

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: NONPROFIT CIP & HOUSING REHABILITATION (Sustainability)**



Applicant Agency: \_\_\_\_\_

Project Name: \_\_\_\_\_

Reviewer's Name: \_\_\_\_\_

Reviewer's Signature: \_\_\_\_\_

<b>OVERALL SCORE:</b>    
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Category	Criteria	Reviewer Score	Maximum Score	
<b>1. Project Characteristics</b>	<b>a.</b> Applicant provides a clear project summary which includes:		5	
	<b>i.</b> Brief description of the project including resulting activities and/or services to be provided;		5	
	<b>ii.</b> Characteristics of Population(s) to be served; and		5	
	<b>iii.</b> The critical need(s) that will be addressed including how other resources are not available to meet the need(s).		5	
	<i>(Applicant should either answer B. i., ii and iii. OR B. iv, v. and vi.)</i>			
	<b>b.</b> Applicant clearly explains how the proposed project will result in energy efficiency, water efficiency, and/or waste diversion <b>improvements</b> to an existing facility or housing :		5	
	<b>i.</b> <u>Facility Improvements</u> : Describe and quantify the sustainability improvements proposed to the facility; AND			
	<b>ii.</b> Explain the methodology used to quantify the proposed sustainability improvements; AND			
	<b>iii.</b> Describe applicant's reinvestment plan for the "cost savings" or "cost avoidance" resulting from the proposed improvements; <b>OR</b>			
<b>iv.</b> <u>Housing Rehab</u> : Describe and quantify the proposed sustainability improvements proposed for the housing units;				
<b>v.</b> Explain the methodology used to quantify the proposed sustainability improvements; AND				
<b>vi.</b> Describe the anticipated "cost savings" or "cost avoidance" (per household) as a result of the proposed improvements.				
<b>c.</b> Applicant clearly identifies the goal(s) of the project and describes how these goals will be met in relation to the Climate Action Plan.			5	
<b>d.</b> Applicant clearly identifies the results of the project:				
<b>i.</b> Number of unduplicated City of San Diego individuals or households to be assisted; or			5	
<b>ii.</b> Number of unduplicated City of San Diego businesses to be assisted.				
Comments:				
		<b>Total:</b>	<b>Points Possible</b>	
			<b>30</b>	

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Category	Criteria	Reviewer Score	Maximum Score
<b>2. Organizational Capacity</b>	a. Applicant clearly describes their experience in successfully implementing projects of similar scope and of comparable complexity.		5
	b. Applicant has experience in providing services to low and moderate income residents or presumed low and moderate income CDBG beneficiaries such as seniors, illiterate adults, homeless persons, abused children and/or battered spouses.		5
	c. i. Do you collaborate with other service agencies, including organizations that provide similar services and resources?		1
	ii. If so, describe HOW your agency collaborates with other service agencies and with whom.		4
	Comments:		<b>Total:</b>
			<b>15</b>
<b>3. Budget</b>	a. Applicant identifies alternative future sources of funding to support the proposed project and demonstrates that the project will not rely on CDBG funds for maintenance of improvements.		5
	b. Budget for project clearly identifies all sources of funding for the total project costs.		5
	c. Budget clearly details uses of funds (City of SD CDBG funds and non-City of SD CDBG funds) by eligible budget line items.		5
	d. Budget clearly lists all other funding sources secured for project, submits documentation for each source listed, and percent of funds leveraged (calculated by: other secured funding/total project costs) is: <div style="display: flex; justify-content: space-around; margin-top: 5px;"> <div style="text-align: center;">0% – 5% (0 points)</div> <div style="text-align: center;">41% – 60% (3 points)</div> </div> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> <div style="text-align: center;">6% – 20% (1 points)</div> <div style="text-align: center;">61% – 80% (4 points)</div> </div> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> <div style="text-align: center;">21% – 40% (2 points)</div> <div style="text-align: center;">81% – 100% (5 points)</div> </div>	<i>(CDD confirmed: % &amp; points)</i>	5
	Comments:		<b>Total:</b>
			<b>20</b>

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Category	Criteria	Reviewer Score	Maximum Score
4. Project Benefits	<p><b>Non-profit Capital Improvement Projects, including Housing Activities</b></p> <p><i>(Applicant should either answer a., d. and e., b., d. and e., or c. d. and e.)</i></p> <p><b>a.</b> Applicant clearly describes how the project will provide services to high need populations and provides the references used for this determination. Public Projects must be considered a Low and Moderate Income Limited Clientele Activity (LMC) by serving one of the following populations:</p> <ul style="list-style-type: none"> <li>i. Presumed Benefit low income clientele as defined by HUD*; or</li> <li>ii. Direct Benefit to Low Income Persons based on compliance with HUD* income limits through documented family size and income.</li> </ul> <p><b>OR</b></p> <p><b>b.</b> Low and Moderate Income Housing (LMH): Units occupied by low and moderate income persons.</p> <p><b>OR</b></p> <p><b>c.</b> Low and Moderate Income Area Benefit (LMA): Facility or improvements will provide activities that are available to benefit all the resident of an area which is primarily residential <b>and</b> that has a service area that qualifies with a majority of HUD eligible census block groups*.</p>		9
	<p><b>d.</b> Geographic Targeting: Proposed facility or housing improvements are located in at least one of the Community Planning areas identified as high need: Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern, City Heights*.</p>		1
	<p><b>e.</b> Geographic Targeting: Applicant has presented clear service delivery to clients located at or near one of more of the six Community Planning areas identified as high need: Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern, City Heights*.</p>		3
	<p>Comments:</p>		
		<b>Total:</b>	<b>Points Possible</b>
			<b>13</b>

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<b>5. Project Specifics</b>	<b>a. Applicant clearly describes Contract Execution Readiness: Extent to which a project is ready to proceed by detailing that:</b>		
	<b>i.</b> Total amount of CDBG funds requested is justified by accurate cost estimations; <i>-If the facility has received CDBG funds for improvements/expansions in the past, applicant must explain the outcome and justification for the request of additional CDBG funds.</i>		4
	<b>ii.</b> The level of Environmental Review (City, State and Federal) needed has been identified and planned for, as demonstrated by HUD Programs staff verification; and	<i>(CDD confirmed score: __)</i>	2
	<b>iii.</b> Clearly describe all applicable permits have been identified, planned for, and/or secured. If permits not needed, applicant clearly describes basis of that determination.		2
	<b>b. Project Scope &amp; Schedule</b>		
	<b>i.</b> The Scope of Work and Budget, in its entirety, demonstrates compliance CDBG eligibility requirements	<i>(CDD confirmed score: __)</i>	1
	<b>ii.</b> The eligible Scope of Work and Budget demonstrates compliance with meeting National Objectives and other HUD requirements; and	<i>(CDD confirmed score: __)</i>	1
<b>iii.</b> Applicant has clearly described how the project will be completed and funds expended within the required 24-month timeline specifying key milestones: <ul style="list-style-type: none"> <li><b>a.</b> Permitting and design completion</li> <li><b>b.</b> Project will be released for bid</li> <li><b>c.</b> Construction contract awarded</li> <li><b>d.</b> Anticipated Construction Timeline</li> <li><b>e.</b> 100% expenditure level</li> <li><b>f.</b> Project completion, beneficiaries reported (National Objective met), and close out report approved by HUD Programs staff</li> </ul>		12	
Comments:			
		<b>Total:</b>	<b>Points Possible</b>
			<b>22</b>

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Category	Criteria	Reviewer Score	Maximum Score
<b>6. Performance Indicators</b>	<p>City of San Diego Track Record: Rating based on past performance of applicant agency on projects previously funded by the City of San Diego under the CDBG programs*. <i>These are subtractive points from maximum 100 point score, designed by documented performance levels:</i></p> <ul style="list-style-type: none"> <li>• Minor deficiencies (-1)</li> <li>• Moderate deficiencies (-2)</li> <li>• Significant deficiencies (-3)</li> </ul> <p><b>Performance Indicator data collected from FY 2015/FY 2016 for FY 2018 evaluations</b></p>	<p><i>(CDD confirmed score: __)</i></p>	<p align="center">-3</p>

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