

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

**HOMEOWNERSHIP PROJECTS**

<b>THRESHOLD CRITERIA</b>		
<b>Application Deadline</b>	The application was submitted by the deadline.	YES/NO
<b>Nonprofit Documentation</b>	<p>Applicant is a Nonprofit</p> <p>501(c)(3) designation by the IRS</p> <p>Copy of Charter and By-laws</p> <p>Active status with the Tennessee Secretary of State</p> <p>Registration with the Tennessee Secretary of State Office of Charitable Solicitations indicating the organization is currently registered to solicit public funds in the Tennessee as of the date of the application <b>(new requirement)</b></p> <p>Nonprofit Grants Manual Acknowledge Form signed by the Board Chair <b>(new requirement)</b></p> <p>Applicant Certification Statement signed by the applicant's authorized representative</p> <p>Annual audit conducted by an independent CPA in accordance with generally accepted auditing standards for the most recently completed fiscal year or issued within the preceding 12 months of the application deadline</p>	YES/NO
<b>Applicant Certifications</b>	<p>There are no outstanding legal claims, Fair Housing complaints, or claims related to wage payments or OSHA violations against the Applicant.</p> <p>There are no outstanding legal claims, Fair Housing complaints, or claims related to wage payments or OSHA violations against any member of the Development / Project Team.</p>	YES/NO
<b>Developer Fee</b>	The Developer Fee does not exceed 20% of the funding request.	YES/NO
<b>Site Control</b>	The applicant has demonstrated site control in one of the following ways:	YES/NO

	<input type="checkbox"/> Deed <input type="checkbox"/> Minimum 30-year ground lease (or for the term of the affordability period if longer than 30-years is proposed) <input type="checkbox"/> Option Agreement/Signed Sales Contract	
<b>HOUSING SECURITY</b>		<b>42 POINTS</b>
<b>Income Targets</b> (Maximum 8 points)	At least 5% of Barnes Fund homes affordable to ≤60% AMI OR	2 points
	At least 10% of Barnes Fund homes affordable to ≤60% AMI OR	4 points
	At least 15% of Barnes Fund homes affordable to ≤60% AMI OR	6 points
	At least 20% of Barnes Fund homes affordable to ≤60% AMI	8 points
<b>Affordability Term</b> (Maximum 10 points)	Up to 40 Years OR	2 points
	Up to 50 Years OR	4 points
	Up to 60 Years OR	6 points
	Up to 70 Years OR	8 points
	80+ Years	10 points

<b>Special Populations</b> (Maximum 4 points)  Project serves one of the following populations:  -Older adults -Single-parent households -Persons with disabilities -Large families (3+ bedrooms) -Youth exiting Foster Care -Justice Impacted Persons -Persons in recovery	At least 10% of Barnes Fund homes serve one of the listed Special Populations	1 point
	OR At least 15% of Barnes Fund homes serve one of the listed Special Populations	2 points
	OR At least 20% of Barnes Fund homes serve one of the listed Special Populations	4 points
<b>Fair Housing &amp; Affirmative Marketing</b> (Maximum 8 points)	Applicant attends annual Fair Housing Training	1 point
	Applicant has a detailed Affirmative Marketing Plan to provide outreach to groups least likely to apply	3 points
	Program documents are accessible to persons with Limited English Proficiency	4 points
<b>Housing Access Criteria</b> (Maximum 4 points)	Publishes clear and transparent application criteria; describes how applications will be prioritized	2 points
	Directly assists buyers with downpayment assistance and/or obtaining a mortgage	2 points
<b>Anti-Displacement Policies &amp; Education, Counseling &amp; Resource Access</b> (Maximum 8 Points)	All costs & fees associated with participating in the program are provided to the applicant & are affordable	2 points
	Offers post-purchase counseling for 5+ years post-purchase (per each new owner)	3 points
	Offers mortgage, tax, or utility assistance or has partnerships with organizations that offer such programs	3 points

<b>PROJECT APPROACH</b>		<b>40 POINTS</b>
<b>Location &amp; Access</b> (Maximum 16 Points)	Project is within 1 mile of transit or all-access corridor	2 points
	OR Project is within 1/2 mile of transit or all-access corridor	4 points
	OR Project is within 1/4 mile of transit or all-access corridor	6 points
	Walk Score $\geq$ 50	2 points
	Sidewalk connection from project to nearest transit stop	4 points
	Project is in UZO or Difficult Development Area	4 points
<b>Neighborhood and Community Benefits</b> (Maximum 7 Points)	Provides passive open space	1 point
	Provides recreational space accessible to residents	2 points
	Creates publicly accessible or multifunctional space, such as greenway connection or community gathering space	4 points
<b>Design Quality</b> (Maximum 8 Points)	Considers character & context of neighborhood	2 points
	Incorporates at least 15 criteria on the Universal Design Checklist	1 point
	OR Incorporates at least 20 criteria on the Universal Design Checklist	2 points
	Broadband/other high-speed internet available	2 points
	Onsite amenities such as gathering spaces, computer rooms, fitness facilities	2 points
<b>Sustainability &amp; Resiliency</b> (Maximum 5 Points)	Incorporates at least 15 elements on Energy Efficiency & Sustainability Checklist	1 point
	OR Incorporates at least 20 elements on Energy Efficiency & Sustainability Checklist	2 points
	OR Incorporates all elements on Energy Efficiency & Sustainability Checklist	3 points
	Educates residents on energy efficiency & sustainability practices	2 points
<b>UNDERWRITING CRITERIA</b>		<b>59 POINTS</b>
<b>Developer Qualifications</b> (Maximum 10 Points)	Applicant/team some experience with projects (1-3) of similar size and scope	1 point
	OR Applicant/team extensive experience with projects (3-5) of similar size and scope	3 points
	OR Applicant/team has extensive experience with projects (6+) of similar size and scope	5 points
	Team/partners have worked together on at least 1 project	2 points

	OR Team/partners have worked together on at least 3 projects	3 points
	Applicant is not partnering with a for-profit OR Applicant is partnering with a for-profit and partnership agreements clearly show nonprofit role in ownership, decision making & long-term stewardship	2 points
<b>Project Readiness</b> (Maximum 25 Points)	Site control demonstrated by sales contract or option agreement	1 point
	OR Site control demonstrated by deed or ground lease for term of proposed affordability period	3 points
	Concept Plans Submitted	1 point
	OR Site Plan & Architectural Drawings Submitted	2 points
	OR Construction drawings & materials submitted	3 points
	Property needs rezoning & process has not started	0 points
	OR Property needs rezoning and process is underway	2 points
	OR Property does not need rezoning	4 points
	Extensive infrastructure improvements required (including off-site)	0 points
	OR No off-site infrastructure required and minimal on-site infrastructure improvements required	2 points
	OR Infrastructure is sufficient (utilities are available)	4 points
	Topographic or other serious site constraints that require extensive mitigation	0 points
OR Site constraints require minimal mitigation	2 points	
OR No site constraints	4 points	
Demonstrated understanding of building codes & permitting processes	1 point	
Solid commitments for at least 20% of remaining balance & realistic plan for remaining funding	2 points	
OR Solid commitments for at least 30% of remaining balance & realistic plan for remaining funding	4 points	
Solid commitments for at least 50% of remaining balance & realistic plan for remaining funding	6 points	
<b>FINANCIAL CAPACITY</b>	Recent financial audit has no outstanding findings	2 points
	Cash flow supports operating expenses	1 point

(Maximum 9 points)	Operating reserve is $\geq 3$ months of operating expenses	1 point
	Nonprofit has $\geq 3$ open contracts OR Nonprofit has 2 open contracts OR Nonprofit has $\leq 1$ open contract	0 points  1 point  2 points
	All open contracts are progressing (at least 1 milestone met and draw request submitted) except Round 15 contract or has no open contracts	3 points
	<b>Funding Need</b> (Maximum 16 points)	
Developer fee $\leq 20\%$ of grant budget OR Developer fee $\leq 15\%$ of grant budget OR Developer fee $\leq 10\%$ of grant budget	1 point  2 points  4 points	
Funding request is less than 50% of total project budget OR Funding request is less than 30% of total project budget OR Funding request is less than 20% of total project budget	2 points  4 points  6 points	
Per unit subsidy is less than 50% of per unit cost/bedroom size OR Per unit subsidy is less than 30% of per unit cost/bedroom size OR Per unit subsidy is less than 20% of per unit cost/bedroom size	2 points  4 points  6 points	
<b>TOTAL POINTS AVAILABLE</b>		<b>138</b>