



# Jefferson Parish Department of Community Development Affordable Housing Program HOME Developer Application (updated June 2023)

## PROJECT

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

Project Street Address: \_\_\_\_\_

Council District of Proposed Project: \_\_\_\_\_

Municipality: \_\_\_\_\_

Developer Name: \_\_\_\_\_

Partner Entities: \_\_\_\_\_

## APPLICATION CONTACT INFORMATION

Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

EIN: \_\_\_\_\_ DUNS/EIS: \_\_\_\_\_

## FUNDING REQUEST SUMMARY

HOME Funds Request: \_\_\_\_\_ Number of HOME Units: \_\_\_\_\_

Total Other Funds: \_\_\_\_\_ Number of Affordable Units: \_\_\_\_\_

Total Development Cost: \_\_\_\_\_ Total Number of Units: \_\_\_\_\_

*HOME Funds request must be for \$100,000 or more, provide 4+ HOME units, and have at least 50% of units as affordable or meeting a special need. HOME funds should not exceed 40% of the Total Development Cost.*



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**DEVELOPER'S STATEMENT**

The undersigned Developer hereby states that all information provided in this application is, to the best of their knowledge, true and accurate. If Jefferson Parish discovers that any information entered in the application is false, then the Parish shall be entitled to remove the Developer from consideration, or to cancel their selection and any award that has been granted to the Developer.

The undersigned Developer acknowledges and understands that a completed application must be submitted to be considered for funding. An application submitted in part, or with missing required information, may not be considered for review and the Parish has no obligation to review a partial or incomplete application.

By completing and submitting this proposal, the undersigned Developer is thereby agreeing to abide by all terms and conditions, as issued by the Parish. The Developer acknowledges their responsibility to follow all Parish, state, and federal requirements applicable to this program and its funding source for the duration of the project development, construction, and subsequent affordability period.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(Authorized Representative)

Printed Name: \_\_\_\_\_ Title: \_\_\_\_\_



## Section A. Project Overview

1. **Summary:** In the space provided, briefly describe the project including the location, type of development, funding and financing sources, ownership structure and current project status.

2. **Development Type:**      \_\_\_\_\_ Homeownership      \_\_\_\_\_ Rental

3. **Construction Type:**

\_\_\_\_\_ New Construction      \_\_\_\_\_ New Construction with Acquisition  
 \_\_\_\_\_ Rehabilitation Only      \_\_\_\_\_ Rehabilitation with Acquisition  
 \_\_\_\_\_ New Construction & Rehabilitation      \_\_\_\_\_ New Con. & Rehabilitation with Acquisition

4. **Building Style(s):**

\_\_\_\_\_ Single Story Multifamily      \_\_\_\_\_ Townhouse/Duplex  
 \_\_\_\_\_ Multifamily 2-5 stories, elevator      \_\_\_\_\_ Single Family Detached  
 \_\_\_\_\_ Multifamily 2-5 stories, non-elevator      \_\_\_\_\_ Group Home/Institutional  
 \_\_\_\_\_ Other (Please Describe): \_\_\_\_\_

5. **Number of Buildings:** Existing \_\_\_\_\_ Proposed \_\_\_\_\_

6. **Population to be served**

\_\_\_\_\_ Senior Citizens – aged 55 or older      \_\_\_\_\_ Families  
 \_\_\_\_\_ Persons with Disabilities      \_\_\_\_\_ Singles  
 \_\_\_\_\_ Persons Experiencing Homeless      \_\_\_\_\_ Persons Returning from Prison or Jail  
 \_\_\_\_\_ Veterans      \_\_\_\_\_ Persons with Addictions

7. **Affordability Mix**

	Eff.	1-bdrm	2-bdrm	3-bdrm	4-bdrm	5-bdrm+	Total
HOME units							
Other Affordable							
Market Rate							
<b>Total</b>							
Will the HOME rental units be Fixed or Floating?					Fixed / Floating		



## Section B. Project Details

### Project Requirements

Proposed projects must adhere to the following criteria to be considered for HOME funds.

#### **Homeownership**

##### ***Project Size***

JPDCD only accepts applications for the development of between 4 and 11 single-family homeownership units. All homeownership units must be affordable and sold to qualifying households with income below 80% of the area median income.

##### ***Timeline***

Federal regulations require HOME-assisted homebuyer units be sold to an eligible buyer within 6 months of construction completion. If a HOME-funded homebuyer unit cannot be sold to income-eligible buyers within 6 months of construction completion, the unit must either be converted to HOME rental unit or the HOME funds expended on the unit must be repaid.

##### ***Maximum Property Value***

The sales price must not exceed 95% of the area median purchase price.

#### **Rental**

##### ***Project Size***

JPDCD only accepts applications for developments of 10 or more rental units. The project must also provide at minimum of 50 percent of affordable units, or meet a special need identify in the JP Consolidated Plan.

##### ***Number of HOME Units***

Projects must propose a minimum of four HOME units to be considered for HOME funds. The total number of High HOME and Low HOME units required is determined through the Subsidy Layering and Underwriting Review. Project can propose a maximum of 11 HOME units.

### Project Specifics

1. Provide a brief description of development of the site, including any known prior uses of the site. If it is a rehabilitation project, include a brief description of the scope of work to be performed.



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2. Discuss how the project fits into the Parish’s vision, as outlined in the Consolidated Plan<sup>1</sup>.

3. Is the site ready to break ground or is pre-development work required? Describe any pre-development work required or already completed. This includes rezoning, special use permit, utilities access, right of way, engineering and soil testing, environmental study.

**Pre-Development Work**

4. Provide current status of each of the following items. See attachments checklist for what must be provided based on status.

ITEM	STATUS
Do you have ownership or control of the site(s)?	Yes/No
If yes, documentation showing ownership must be included. If no, provide a description status of acquisition.	
Is the property zoned appropriately for the proposed project?	Yes/No
Do you have architectural plans and a site plan for the project?	Yes/No
Has an environmental study of the site been undertaken?	Yes/No
Has a market assessment or study been completed for the project?	Yes/No
Has an appraisal been completed on the project?	Yes/No
Has a development schedule been proposed for the project?	Yes/No
Is the property vacant/unoccupied?	Yes/No



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5. Describe amenities and/or supportive services; including clubhouses, gym, laundry, that the development will include.

6. Total Unit Breakdown

# of Beds	Eff.	1-bdrm	2-bdrm	3-bdrm	4-bdrm	5-bdrm+	Total
New Construction							
Rehab							
Occupied							
Vacant							
Existing-No Rehab							
<b>Total</b>							

7. Property Management *(For RENTAL projects with 15 or more total units only)*

Has a management plan been completed for the project?	Yes / No/ N/A
If so, does it include a tenant selection plan?	Yes / No/ N/A

8. **Affirmative Marketing Plan:** Please discuss how you will meet HOME’s Affirmative Market Requirements – special outreach to those groups least likely to apply for HOME-assisted housing, such as: information on the target audience; strategies to notify target audience of the availability of units; strategies to ensure non-English speaking audiences are made aware of the availability of units; and strategies to support potential buyers be successful in affording and maintaining as homeowners.

*For affordable rental housing with five or more HOME assisted units, JPDCD requires applicants to develop an Affirmative Marketing Plan and a set of procedures for implementing the plan. See attached guidance and HUD Form.*



## Section B Required Attachments Checklist

Attach the following documents as required for the proposed project. *\*See Appendices for forms and templates.*

### Required for all submissions

- Project location map with site identified
- Site plan
- Proof of site control and zoning, or narrative describing status of acquisition
- Development schedule and timeline
- Section 3 Utilization Plan\*

### Required if proposed project has 5 or more HOME units

- Affirmative marketing plan and form\*

### Required if proposed project has currently occupied units

- Relocation plan

### Required for all HOMEOWNERSHIP projects

- Marketing and Sales Plan
- Sales schedule demonstrating sales within 6 months of construction completion

### Required for all projects before final approval. Submit if available.

*If not available at the time of your application submission, provide a timeline with the attachments for when these will be completed and submitted.*

- Architectural plans and drawings
- Environmental assessment or study of proposed location
- Market assessment\* or independent study of proposed area (for 15 or more units)
- As-Built Appraisal
- Other reports, testing, or permitting related to the project site

### Required for all RENTAL projects before final approval. Submit if available.

*If not available at the time of your application submission, provide a timeline with the attachments for when these will be completed and submitted.*

- Property Management Plan
- Tenant Selection Plan
- 18 Month Lease Up Plan\*



## Section C. Project Financials

The following sections of the HOME Developer Program Policies and Procedures are included as a courtesy. Developers are responsible for reviewing the policies and procedures.

### **All Projects**

#### ***Minimum and Maximum Award Request***

Due to limited funds, JPDCD HOME funds are intended as gap funds. Developers can request up to 40 percent of their Total Development Costs in HOME funds, in proportional share to the number of HOME units. Requests for funds under \$100,000 will not be considered, due to the cost and effort associated with application review and long-term project compliance. Per federal regulations, the minimum amount of HOME funds that must be invested in a project involving rental housing is \$1,000 times the number of HOME-assisted units in the project. Per federal regulations, the maximum amount of HOME funds that can be invested in HOME-assisted unit is established by Section 234-Condominium Housing basic mortgage limits, for elevator-type projects.

#### ***Award Type***

All HOME funds are awarded as forgivable, no-interest loans, and are properties are required to remain affordable for the life of the affordability period. At the end of the affordability period (between 5 and 20 years, depending on the amount of HOME funds and the type of development), JPDCD fully forgives the loan. A mortgage, promissory note, and deed restriction are recorded against the property to enforce the affordability period.

#### ***Affordability Period***

Activity	HOME Investment Per-Unit	Minimum Affordability Period
Rehabilitation or Acquisition of Existing Housing	<\$15,000/unit	5 years
	\$15,000- \$40,000/unit	10 years
	>\$40,000	15 years
New Construction or Acquisition of New Housing	Any \$ amount	20 years

#### ***Developer Fee***

Developers may include a Developer Fee as part of the development budget. This fee may not exceed 15 percent of the total project cost.

#### ***Project Contingency***

Projects must include contingency. The contingency rate should NOT include the developer's fee. When calculating the contingency amount, deduct the developer or management fee from the total project budget before applying the rate.

	Hard Costs	Soft Costs	Contingency Rate
Min Rates	7%	2%	9%
Max Rates	12%	5%	17%





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**Homeownership Projects**

HOME funds can only be requested for development and construction subsidies. If units are expected to need direct homebuyer assistance, the buyer must participate in the Jefferson Parish First Time Homebuyer program.

Total HOME funds in a single unit, including direct homebuyer assistance and direct construction subsidy, must be less than the maximum per unit amount set by Section 234-Condominium Housing basic mortgage limits, for elevator-type projects.

Maximum HOME Investment Per Unit – 2023			
Bedrooms	Base Limit	HUB Percentage (From HOME Fire Vol 12 No.1)	LHC Statewide Limit (For All Areas except the cities of New Orleans and Shreveport)
0	\$72,088.00	270.00%	\$194,638.00
1	\$82,638.00	270.00%	\$223,123.00
2	\$100,490.00	270.00%	\$271,323.00
3	\$130,002.00	270.00%	\$351,005.00
4 or More	\$142,701.00	270.00%	\$385,293.00
Effective April 7, 2023			

HUD sets appraisal and price limits at 95 percent of the median purchase price for the area for new construction and existing housing. New construction for homeownership cannot appraise for more than the limits set by HUD annually.<sup>2</sup> These values are based on Federal Housing Administration (FHA) single family mortgage program data and U.S. Census Bureau data for newly constructed housing. Parish-supported development projects that include homeownership units must abide by the following sales price limits according to the number of units included in a sale.

FY2023 HOME New Homes Purchase Price Limit Jefferson Parish – New Orleans Metro Area			
1-Unit	2-unit	3-unit	4-unit
\$271,000	\$347,000	\$420,000	\$520,000

<sup>2</sup> HUD HOME and HTF Homeownership Value Limits, <https://www.hudexchange.info/news/home-and-htf-homeownership-value-limits/>



**Rental Projects**

***HOME Maximum Rents and Project Rule***

In projects of five or more HOME assisted units, at least 20 percent (or one unit out of every five units) of the HOME assisted rental units must be occupied by families who have annual incomes that are 50 percent or less of median income. These very-low-income tenants must occupy units at or below the Low HOME Rent level.

2023 HOME Program Rent Limits							
Rent Limit	EFFICIENCY	1 BED	2 BED	3 BED	4 BED	5 BED	6 BED
Low HOME Rent Limit	\$717	\$768	\$922	\$1,066	\$1,190	\$1,312	\$1,435
High HOME Rent Limit	\$848	\$980	\$1,178	\$1,352	\$1,489	\$1,624	\$1,760
50% RENT LIMIT	\$717	\$768	\$922	\$1,066	\$1,190	\$1,312	\$1,435
65% RENT LIMIT	\$914	\$980	\$1,178	\$1,352	\$1,489	\$1,624	\$1,760
Effective July 1, 2023							

***Rent Limits and Utility Allowance***

The above rent limits assume all utilities are included in the cost of rent. If a project includes tenant-paid utilities, the developer must calculate the allowance for each tenant-paid utility (electric, sewer, water, gas, garbage, etc.) and by unit size and provide the allowance calculations to JPDCD with appropriate supporting documentation. Projects that are proposing to use LIHTC should use the LHC allowance. The utility allowance is deducted from the maximum allowable rent to determine the effective tenant rent.

***Initial Occupancy Income Restrictions***

During the first year of occupancy, 90 percent of the HOME units must be rented to households below 60 percent AMI. HOME units must always assist households under 80 percent AMI.

***Debt Service Coverage Ratio***

To be considered for HOME funds, projects must support a Debt Service Coverage Ratio (DCSR) above 1.10 throughout the affordability period. The desired range for debt service coverage is between 1.10 – 1.30 over the affordability period.

- Projects that have a debt service coverage ratio below 1.00 are not eligible for HOME funds.
- Projects with a consistent DCSR above 1.30 will be required to reduce HOME rents or increase project reserves with additional cash to endure they fall within the desired range.
- Awarded projects that do not maintain the required debt service coverage ratio during the life of the affordability period may incur penalties by JPDCD on grant funds received.



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***Equity Contribution***

Developers are required to invest a certain percentage of equity into the proposed project based on the total development cost.

<b>Total Development Cost</b>	<b>Required Equity Contribution</b>
Under \$2,500,000	10%
Between \$2,500,000 - \$15,000,000	5%
Above \$15,000,000	3%

***Property Management Fees or Administration/Staffing Expenses***

The industry standard charged for an outside firm to complete property management tasks is between 5 – 15 percent of rents collected. If the fee charged is above 15 percent, there should be additional documentation to justify the need for more intensive management.

***Operating Reserves***

Developers are required to include an operating reserve equal to at least six months of the anticipated annual operating expenses for the first year of full occupancy. Developers may have up to 12 months of operating reserves. This calculation is based on the entire project's operating expenses.

***Replacement Reserves***

Developers are required to include replacement reserves equal to one month's rent in the first year of occupancy, per unit, per year. Replacement reserves are required for all units, not just the HOME units.

***Investor Fees (LIHTC Only)***

JPDCD adheres to the industry standard is five percent of rents collected to cover the cost of LIHTC compliance. If the investor fee is greater than five percent, the developer must provide justification for why a high fee is necessary.



## Section C Required Attachments Checklist

Attach the following documents.

### Workbook - Required for all projects

- Total development costs
- Sources and uses

### Workbook – Required for RENTAL projects

- Rent schedule, by bedroom size, construction type, and affordability restriction
- Utility allowance, by bedroom size
- Operating expenses
- 20-year Operating proforma

### Supporting Documentation - Required for RENTAL projects

- Evidence of other funding, including term sheets
- Supporting documentation for utility allowance calculations
- Additional documentation to justify expense or rates outside of the ranges stipulated

### Supporting Documentation - Required for HOMEOWNERSHIP projects

- Evidence of other funding, including term sheets
- Revenue reinvestment schedule for additional units (if applicable)
- Per unit budget, including anticipated sales price



## D. Development Team Experience and Qualifications

1. **Name of Developer(s):** \_\_\_\_\_

2. **Type of Organization:**

\_\_\_\_\_ Individual                      \_\_\_\_\_ Corporation                      \_\_\_\_\_ Non-Profit  
\_\_\_\_\_ General Partnership                      \_\_\_\_\_ Limited Liability Corp.                      \_\_\_\_\_ Limited Partnership  
\_\_\_\_\_ Other (Explain): \_\_\_\_\_

3. **Developer Experience:**

Number of years in operation: \_\_\_\_\_

Number of Employees: Full time: \_\_\_\_\_ Part Time: \_\_\_\_\_

Number of housing projects completed: \_\_\_\_\_

Number of housing projects completed with Federal, State or Parish funds: \_\_\_\_\_

Number of projects completed with HOME funds: \_\_\_\_\_

Number of housing projects currently under construction: \_\_\_\_\_

How many projects in your portfolio are in predevelopment? \_\_\_\_\_ Of these, how many do you anticipate beginning construction within the next three years? \_\_\_\_\_

Number of completed housing projects in which developer(s) or its affiliate is the managing general partner/managing member: \_\_\_\_\_

4. **Development Team**

Partner/owner: \_\_\_\_\_

Years in operation: \_\_\_\_\_ number of employees: \_\_\_\_\_

# of completed housing projects: \_\_\_\_\_ # of HOME projects: \_\_\_\_\_

# of projects under development: \_\_\_\_\_ # of projects under ownership: \_\_\_\_\_

Builder: \_\_\_\_\_ License #: \_\_\_\_\_

Years in operation: \_\_\_\_\_ Number of employees: \_\_\_\_\_

# of completed housing projects: \_\_\_\_\_ # of HOME projects: \_\_\_\_\_

# of projects currently under construction: \_\_\_\_\_

Property manager/Sales Team: \_\_\_\_\_

Years in operation: \_\_\_\_\_ Number of employees: \_\_\_\_\_

# of affordable developments under management/sold: \_\_\_\_\_

# of HOME projects under management/sold: \_\_\_\_\_

# of projects using Part 5 income verification method \_\_\_\_\_

*Note: if the developer is acting as property manager/sales team, this information is still needed.*



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**5. CHDO Narrative:**

**For CHDO applicants only** – Provide a brief narrative that describes the roles and responsibilities of your organization on this project (e.g. as the developer, sponsor and/or property owner).



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6. **Developed Projects:** Provide a list of recent projects of similar size and budget for each party in the development team.

**Developer**

Name of Development	City & State	Development Type – Senior, Family, etc.	Total # of Units	# of Aff. Units	Funding Source – HOME, LIHTC, etc.	Year Comp.	Occ. Rate

**Partner/Owner**

Name of Development	City & State	Development Type – Senior, Family, etc.	Total # of Units	# of Aff. Units	Funding Source – HOME, LIHTC, etc.	Year Comp.	Occ. Rate

**Property Manager / Sales Team**

Name of Development	City & State	Development Type – Senior, Family, etc.	Total # of Units	# of Aff. Units	Funding Source – HOME, LIHTC, etc.	Year Comp.	Occ. Rate



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7. **Project References:** Provide a list of professional references that Jefferson Parish may contact.

**Developer**

Name of Reference	Name of Development	Project Role	Phone	Email

**Partner/Owner**

Name of Reference	Name of Development	Project Role	Phone	Email

**Property Manager/ Sakes Team**

Name of Reference	Name of Development	Project Role	Phone	Email





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8. **Federal Requirements Experience:** Provide a list of which Development Team members have compliance and reporting experience with the following federal requirements. Briefly describe the experience. Use blank spaces for additional team members. Use an additional page if needed.

Federal Requirement	Member Name	Project Role	Description of Experience
Section 3			
Davis-Bacon & Certified Payroll			
Uniform Relocation Act			
Lead-Based Paint Standards			
Fair Housing & Equal Opportunity Laws			
ADA			
Section 504			

9. **HOME Training:** Provide a list of any trainings on HOME or HOME-rental completed by members of the Development Team. Use additional pages if necessary.

Training Name & Provider	Date & Location	Member Name	Project Role



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10. **Financial Interest:** Is there an ownership interest between any of the members of the development team? If so, please explain:

11. **Audit:** Disclose any non-compliance, unresolved audit or monitoring findings.

12. **Incomplete Projects:** Has the developer(s), under its present name or any previously-used name, or any of its principals, ever commenced construction of a project that it has not completed, except those currently under construction? If yes, provide details. Use extra sheets if necessary.

13. **Litigation:** Is there any litigation (past, pending, active or resolved) against the developer, member of the development team, or project? If so, please provide a brief explanation.



## Section D Required Attachments Checklist

Attach the following documents for all firms of the Development Team to demonstrate the business is operational and in good standing.

### Required for all firms included in the application as part of the Development Team

- Resumes for each member of the Development Team involved in the proposed project
- Louisiana Secretary of State Business Filing print out showing status
- Sam.gov print out with DUNS/EIS number
- Organizational chart, including names of senior management and board members

### Required for the Lead Development Firm

- Bylaws
- Articles of Incorporation or Charter
- Two of the most recent Financial Audits (must be from 2016 or later)
- If a new LLC is being formed, audits or audited financials for each partner firm or individual*
- Documentation to demonstrate 10 percent of total development costs in net assets

### Required for CHDO Certification\*

- CHDO Requirements Checklist
- Articles of Incorporation or Bylaws
- 503(c)(3) or (c)(4)
- Affidavit of Standards of Financial Management Systems
- Organizational Chart
- Certification of Board Status and Affidavit of Board Representation demonstrating governing board consists of not less than one-third low-income persons and not more than one-third public officials
- Statement signed by the Board President that details at least one year of experience serving Jefferson Parish

\*Certification documentation required if not submitted prior to application period to JPDCD



## Appendix

### HOME Developer Program Key Terms and Definitions

**Acquisition** – The purchase of property. All acquisitions must comply with the requirements of [49 CFR Part 24](#) and the Uniform Relocation Assistance Act and Real Property Acquisition Policy of 1970, as amended (URA).

**Affordability** - The requirements of HOME that relate to the cost of housing both at initial occupancy and over established timeframes. The homebuyer's written agreement requires housing assisted with HOME funds to meet the affordability requirements of [24 CFR Part 92.252](#) or [24 CFR Part 92.254](#), as applicable, and requires repayment of the funds if the property owner does not meet the affordability requirements for the specified time period.

**Affordability Period** - The minimum period of time during which income-eligible households must occupy a HOME-assisted unit (rental or purchased) and comply with the HOME rules and regulations. To ensure that HOME investments yield affordable housing over the long term, HOME imposes occupancy requirements for rental and homebuyer units for a set time period based on the amount of HOME funds invested in the unit. For homebuyer projects, the length of the affordability period requirements varies depending upon the amount of HOME funds provided.

**Area Median Income (AMI)** - The median income of the region, established by HUD, which is adjusted for family size and used to determine the maximum income for households targeted in assisted projects. This is provided by HUD on an annual basis.

**Community Housing Development Organization (CHDO)** - A private nonprofit, community-based service organization with qualified staff that is receiving HOME funds as the owner, developer or sponsor of affordable housing for the community it serves.

**CHDO Set-Aside Funds** - HOME allocated funds set aside by the Parish (*a minimum of 15 percent*) from each annual HOME allocation for homebuyer or rental housing which is owned, developed, or sponsored by certified CHDOs.

**Developer Fee** - Compensation for the developer's time and for taking on the risk of developing a commercial or residential construction project. This fee can be up to 15 percent of the total project cost.

**Direct HOME Subsidy** - The amount of HOME assistance, including any program income, that is invested in a project. In addition, direct subsidy includes any assistance to a homebuyer that reduces the purchase price from fair market value to an affordable price.

**Director** - The Director of Jefferson Parish Department of Community Development or any other person(s) that may be designated to perform the various functions assigned to the Director.



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**Environmental Review** - An environmental review is the process of reviewing a project to determine its potential environmental impacts and whether it meets federal, state, and local environmental standards.

**Hard Costs** - Expenses to develop housing that are invested in the physical property, generally including all construction costs. For additional details see [24 CFR Part 92.206](#).

**HOME-Assisted Units** - The HOME Program distinguishes between the units in a project that have been assisted with HOME funds and those that have not -- hence the term **HOME-assisted** unit. This distinction between HOME-assisted and unassisted units allows HOME funds to be spent on mixed-income projects while still targeting HOME dollars only to income-eligible households.

**Income-Eligible Household** - Households with incomes at or below 80 percent of the median income, adjusted for family size.

**Low-Income Families** – Families whose annual incomes do not exceed 80 percent of the median income for the area, as determined by HUD, with adjustments for smaller and larger families. An individual does not qualify as a low-income family if the individual is a student who is not eligible to receive Section 8 assistance under [24 CFR Part 5.612](#).

**Net Proceeds** -The sales price of the home minus superior loan repayment (other than HOME funds) and any closing costs.

**Program Funds** - Funds that have been duly appropriated or allocated to the Developer Program.

**Program Income** - Gross revenue received by a subrecipient generated from activities supported by HOME funds or matching contributions.

**Project** – A site or sites together with any building (including manufactured housing unit) or buildings located on the site(s) under common ownership, management and financing, to be assisted with HOME funds as a single undertaking. The “project” includes all of the activities associated with the site and building.

**Project Funding** - Any governmental and private funds, used to pay for hard and soft costs to carry out the construction or rehabilitation of housing under the Developer Program as described in [24 CFR §92.206](#).

**Property Owner** – Refers to the responsible individual that owns HOME-assisted housing and must meet HOME requirements and affordability period for the unit. This includes both owners of rental units and homebuyers.

**Recapture** - The mechanism for JPDCD to collect all or a portion of the direct HOME subsidy if the HOME recipient decides to sell the property within the affordability period at whatever price the market will bear.

**Soft Costs** - Expenses related to the development of affordable housing that are not direct construction. For additional details see [24 CFR Part 92.206](#).



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**Special Flood Hazard Area (SFHA)** – A National Flood Insurance Program (NFIP) area where NFIP floodplain management regulations must be enforced due to high risk of localized flooding and for which mandatory purchase of flood insurance applies.

**Subsidy Layering** - A financial review to ensure the project has long-term viability based on its investments, revenue sources, expenditures, and expected rate of return. A subsidy layering review calculates the gap of funds needed for the project to be completed, which is used as part of the determination for a HOME funding award.

**Uniform Physical Condition Standards (UPCS):** HUD adopted property standards for acquisition and rehabilitation of existing housing and ongoing standards for rental projects separate from local code standards.



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## Application Submittal Guidelines

### **Submission**

Applicants should submit two copies of the applications: one electronic and one hard copy (original). All applications must be typed, and faxed applications will NOT be accepted. Excel workbooks must be submitted electronically as Excel workbooks. Please do not send videotapes, audio cassettes or materials other than the required attachments.

Electronic Submission: Applicant organizations **must** email one (1) complete digital (PDF, with Excel for Workbook) application package to the Jefferson Parish Department of Community Development Programs. The complete application package should be emailed to JPDCD at [homedevelopers@jeffparish.net](mailto:homedevelopers@jeffparish.net).

Original Submission: All hard copies of the application(s) should be mailed to the JPDCD Office listed below.

Jefferson Parish Department of Community Development  
Attn: JPDCD HOME Developer Program  
1221 Elmwood Park Blvd., Suite 605  
Jefferson, LA 70123

### **Submission Reviews**

JPDCD accept applications on an ongoing basis during each Fiscal Year until all funds are awarded. Applications are reviewed collectively every sixty (60) days. All applications must be complete by the time of the review period to be included in the round for consideration. Scheduled review periods are as follows, and may be updated as necessary:

- October 1 of the current fiscal year
  - Review for all submissions received between August 1 and September 30
- December 1 of the current fiscal year
  - Review for all submissions received between October 1 and November 30
- March 1 of the current fiscal year
  - Review for all submissions received between December 1 and February 28 (extra time due to winter and Mardi Gras holidays)

Acceptance of an application for consideration does not obligate Jefferson Parish to commit any funding or other support. Projects that are approved are contingent upon availability of funds, and only those projects approved may be notified of a conditional funding award.

Once JPDCD has received an application, either a hard or electronic copy, it will review the materials to ensure that the application is substantially complete. Incomplete applications will not be reviewed. JPDCD is not obligated to pursue missing information or to consider supplemental materials that are provided after the application submission. Applicants should ensure that their applications are complete and ready for review and scoring at time of submittal. If the Parish determines the



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application is incomplete and insufficient to review, the applicant will be notified, and materials may be returned. So long as the Parish determines that the application is substantially complete, it may allow applicants to submit additional materials. In addition, JPDCD reserves the right to request additional information, not required on the application, on a case by case basis.

### **Trainings and Submitted Questions**

Prepared instructions are included with the application to assist Developers in completing each section. Developers may submit questions on the application, submission, or the review process to [homedevelopers@jeffparish.net](mailto:homedevelopers@jeffparish.net). JPDCD provides a response to all questions received and maintains a log of submitted questions and responses on the website along with the application materials.

### **Accessibility and Non-Discrimination**

Jefferson Parish does not discriminate based on race, creed, color, gender or national origin.

In accordance with provisions of the American with Disabilities Act Amendments Act of 2008, as amended, Jefferson Parish shall not discriminate against individuals with disabilities on the basis of disability in its services, programs or activities.

If you require auxiliary aids or devices, or other reasonable accommodation under the ADA Amendments Act, please submit your request to the ADA Coordinator at least forty-eight (48) hours in advance or as soon as practical. A seventy-two (72) hour advanced notice is required to request Certified ASL interpreters.

ADA Coordinator / Office of Citizens with Disabilities  
(504) 736-6086  
[ADA@jeffparish.net](mailto:ADA@jeffparish.net)





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## Section 3 Plan

Section 3 is a mechanism for HUD to foster economic development on a neighborhood level, by encouraging hiring practices that target low-income individuals that may live close to a HUD-funded project site. Any project that receives \$100,000 or more in HUD funding must comply with Section 3 and provide a Section 3 plan by completing the **Section 3 Utilization Plan form**. Section 3 goals may be determined by each project.

The Section 3 Utilization Plan form can be found on the JPDCD website at <https://www.jeffparish.net/departments/community-development/section-3>

If a project is awarded and moves to construction, monthly Section 3 reporting will be required by the Developer, contractors, and subcontractors with awards greater than \$100,000.

More information on Section 3 may be found at <https://www.govinfo.gov/content/pkg/FR-2020-09-29/pdf/2020-19185.pdf>



## Market Assessment Form

*This assessment is to be completed by an independent third party and will not be accepted if completed by the project developer or project staff. Refer to the attached form directions and definitions for guidance.*

<b>1) MARKET AREA</b>	
a) Describe the targeted Market Area and identify the Council district used to define boundaries	
b) Number of renter occupied households in the market area:	
c) Average household size in the Market Area:	
d) Vacancy rate in the Market Area:	
e) Median household Income of Market Area:	\$ 0.00
f) Number of households at 80% AMI or less in the Market Area:	
g) Number of households with cost burden in the Market Area:	
Provide Source(s)/date: <a href="https://egis.hud.gov/cpdmaps/">https://egis.hud.gov/cpdmaps/</a> ;	
<i>Parish-wide Comparison</i>	
Source: U.S. Census Bureau, 2021 ACS 1-Year Estimates	
h) Number of renter occupied households within Parish:	65,264
i) Median household Income of Parish:	\$ 56,282.00
j) Number of renter households at 80% AMI or less in the Parish:	38,935 (60%)
k) Number of renter households with cost burden in the Parish:	30,850 (47%)
l) How are the needs of the Market Area similar to the needs of the Parish? How are they different? Explain.	
m) What are the benefits to developing in this area? What resources and infrastructure will be available to potential residents?	



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n) Is additional evidence of demand provided as an attachment (i.e. rental waitlists, voucher/rental assistance, or Continuum of Care data)?		YES	NO	
<b>2) COMPARABLE PROJECTS REVIEW</b> <i>Provide a minimum of 3 properties for comparison and provide details on each development as an attachment. Supporting documentation required – see instructions for details. Use HUD Form 92273, which can be found on HUD’s website at <a href="https://www.hud.gov/sites/documents/92273.PDF">https://www.hud.gov/sites/documents/92273.PDF</a>, for detail.</i>				
<b>Summary of Comparable Projects</b>				
<b><u>Comparable Development #1</u></b>		Federally Funded?		
Name:		YES	NO	
Address:		Affordable	Rental	
Developer:		Units?		
Property Manager:		YES	NO	
<b><u>Comparable Development #2</u></b>		Federally Funded?		
Name:		YES	NO	
Address:		Affordable	Rental	
Developer:		Units?		
Property Manager:		YES	NO	
<b><u>Comparable Development #3</u></b>		Federally Funded?		
Name:		YES	NO	
Address:		Affordable	Rental	
Developer:		Units?		
Property Manager:		YES	NO	
Average household size of prospective renters:				
Average vacancy rate of comparable properties:				
<b>RENTS</b>	1 bd unit	2 bd unit	3 bd unit	4 bd unit
Average rent of Comparable Projects				
Estimate rents of Proposed Project				
HUD Fair Market Rents (FY2023)	\$1,002.00	\$1,182.00	\$1,524.00	\$1,770.00
<b>3) Estimated capture rate for Market Area:</b>	_____ % or # of units per # of applicants			
<i>Capture rate is a percentage calculated by the proposed project’s units divided by the expected applicant pool (households in market area that are assumed to meet criteria for affordable housing)</i>				



**INDEPENDENT (3<sup>RD</sup> PARTY) ASSESSMENT COMPLETED BY:**

\_\_\_\_\_  
*Name*

\_\_\_\_\_  
*Organization*

\_\_\_\_\_  
*Date*

**4) ASSESSMENT REVIEW (Jefferson Parish Staff ONLY)**

Does analysis provided indicate HOME assisted units can be reasonably expected to be leased within 18 months of construction? If additional space is needed, include the market study summary as an attachment.

Yes

No

*Reviewed By:* \_\_\_\_\_  
*Name*

\_\_\_\_\_  
*Title/Department* *Date*

Comments:



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## Market Assessment Form Guidance

### Definitions

**Market Assessment** – Analysis to assist Parish with identifying the current market demand in the area the project will be located, based on [HOME Rule 92.250\(b\)\(2\)](#).

**Market Area** – A defined area surrounding the project site, and preferably bounded by a reliable data source, such as a council district, zip code, or census tract.

**Cost Burden** – A household experiences cost burden if the costs for housing (rent, utilities, etc) exceed 30 percent of a household's total income.

**Parish-wide Comparison** – Values provided by Parish based on most recent data available from HUD and U.S. Census.

**Comparable projects** – Projects similar in size and scope to the proposed, ideally that were either similarly funded and/or provided affordable rentals. Documentation for comparable projects should provide details for each development, including year built, address, point of contact, number and types of units, occupancy rate, and current rental rates. Complete HUD Form 92273 for support, which can be found on HUD's website at <https://www.hud.gov/sites/documents/92273.PDF>.

**Fair Market Rent** – As calculated by HUD to determine the rental values for voucher and housing assistance programs.

**Capture Rate** – The percentage of likely eligible and interested households living near or in the market area who need to apply for rental units in the proposed project to fully occupy it.

**Completed by** – The third-party individual and/or organization responsible for completing the form

**Market Study** – Completed by a third-party to provide a review of the data included on the assessment form and an objective evaluation of the potential performance of the development based on the location, market conditions, and demographic and economic trends in the market area.

### Instructions

**This assessment is to be completed by a third party for the developer to include in the application for JPDCD's consideration. Developers may not submit an assessment completed by their own staff.**

1. Define the Market Area for the proposed project
  - a. Identify and define the Market Area by a clearly defined boundary area (i.e. Council District, Zip Code, census, etc.). A neighborhood radius could be used as well if data is available and sources can be provided. Data used should be no more than five years old. List data sources on form or provide as attachment.

*b-g Complete household details, using and citing recent and reliable data sources for household information and income levels.*

*CPD Maps is a HUD data and mapping site that may provide Market Area data at the census tract level. This can be used as a source for market area data, but local sources should also be referenced.*

TO USE CPD MAPS,

- Go to <https://egis.hud.gov/cpdmaps/>
- In upper left corner, search for "Jefferson Parish, LA".
- In the pop-up box select "JEFFERSON PARISH-CDBG" and click *Finish*. Close the next pop-up box.



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- On top menu bar, click *Map Query*.
  1. Select buttons for “Grantee Jurisdiction” and “Tract”, click *Next*.
  2. Check the boxes related to the housing data needed, for example
    - a. **For Vacancy Rate:** Scroll down. Under Housing Supply, check the box for Vacancy Rate
    - b. **For Cost Burden:** Scroll down. Under Housing Needs, check the boxes for % of households with cost burden and % of households with severe cost burden, click *Next*.
    - c. **Limit is three variables per search.** Recommend searching one at a time.
  3. The Min/Max values should be preset, then click *Finish*.
- Zoom in on the map to find the census tract that includes the market area for your project. When you click on a tract, the data will show in a pop-up box.
  - b. Number of renter occupied households in the market area: the total number of rental households in the defined market area that are currently under lease
  - c. Average household size in the Market Area: the average number of people within households in the market area
  - d. Vacancy rate in the Market Area: the percentage of rental households within the market area that are currently available
  - e. Median household Income of Market Area: the middle value for annual income of all households within the market area (not the average)
  - f. Number of households at 80% AMI or less in the Market Area: the total number of households within the market area that have annual incomes at or below 80 percent of the median household income
  - g. Number of households with cost burden in the Market Area: the total number of households within the market area that spend 30 percent or more on housing costs each month
  - h-m *Parish-wide household details provided for comparison to the selected market area.*
    - h. Number of renter occupied households within Parish: the total number of rental households in the parish that are currently under lease
    - i. Median household Income of Parish: the middle value for annual income of all households within the parish (not the average)
    - j. Number of renter households at 80% AMI or less in the Parish: the total number of renter occupied households within the parish that have annual incomes at or below 80 percent of the median household income
    - k. Number of renter households with cost burden in the Parish: the total number of renter occupied households within the parish that spend 30 percent or more on housing costs each month
    - l. Needs of the Market Area: Provide an assessment comparing the Market Area to Parish data
    - m. Resources and Infrastructure: Identify the resources within the Market Area that would benefit potential residents, such as transportation routes, grocery stores, schools, and other community resources. Provide maps and other relevant detail as an attachment.



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- n. Additional evidence of demand: May provide applications/waiting lists from similar projects, voucher/rental assistance pipelines, or Continuum of Care data for homeless/special needs projects, etc. to demonstrate need in an attachment to the assessment.
2. Provide a review of at least 3 comparable projects to the proposed development. The comparable properties should be developments available in or near the market area.

On this form: Include the name, address, developer, point of contact (property manager), and whether it used federal funds and/or provides subsidized or affordable rents. Follow the instructions below for (a) through (g).

On the HUD Form 92273 (download from the HUD website<sup>3</sup>): Directly compare the properties' current rates and amenities. On an additional page describe why the comparable projects were selected and include details for each development.

    - a. Comparable properties that were federally funded (development names and addresses): List which of the comparable properties selected used federal funding for development and construction. Details provided on developments should include information on the type of funding and how it was used, if available.
    - b. Comparable properties that provide affordable rental units (development names and addresses): List which of the comparable properties selected provide subsidized or lower rental rates for at least some units. Provide the number of units with affordable rents. Details provided on developments should include information on affordable rent programs.
    - c. Average household size of prospective renters: Based on the unit sizes of the comparable properties, and average household size of the market area, determine the expected average household size of renters for the proposed development
    - d. Average vacancy rate of comparable properties: Provide the overall average rate of available units from all comparable properties
    - e. Average rents of comparable bedroom units: Provide the overall average rates of each unit type from all comparable properties
    - f. Estimated rents of proposed development: Provide an estimate of market rental rates for each unit type that will be available in the proposed development
    - g. HUD Fair market rents: The set rental rates determined by HUD for voucher and housing assistance programs
  3. Calculate the estimated capture rate for the proposed development based on the completed market analysis and comparable projects analysis.
  4. Assessment Review: When the Market Assessment form is completed and submitted to JPDCD as part of a development project application, JPDCD staff will complete the Assessment Review section as part of the full application review and will use the data provided to determine the best reasonable outcome for proposed project.

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<sup>3</sup> Comparable Properties HUD Form 92273, <https://www.hud.gov/sites/documents/92273.PDF>



## Affirmative Marketing Plan Guidance

Applicants planning affordable rental housing projects with five or more HOME assisted units are required to develop an Affirmative Marketing Plan and a set of procedures for implementing the plan. Applicants must also complete the corresponding HUD Form (single-family or multi-family) with the plan. Both are submitted to JPDCD for review and the form is submitted to HUD for approval if the project is selected.

Affirmative marketing plans must include the following information:

1. Commitment to complying with federal and state fair housing laws, including the use of the Fair Housing logo, and equal opportunity language, and other JPDCD policies. Describe how the project will maintain compliance with federal and state fair housing laws.
2. Describe what methods will be used for informing the public and potential tenants about fair housing laws.
3. Describe the overall efforts the developer will take to affirmatively market the HOME-assisted housing project, including types and sources of advertising and outreach.
4. Describe efforts the developer will take to market to and inform persons not likely to apply for affordable housing without outreach.
5. State if a residency preference is made and provide an explanation for the preference (*Multi-family only*). A residency preference is a preference for selection of persons who reside or work in a specified geographic area (24 CFR 5.655(c)(1)(ii)).
6. Provide a list of community contacts to be used for marketing and outreach, including name, organization, address and phone number.
7. Describe how outreach will be evaluated, including corrective measures to be taken if the assessment shows outreach has not been effective.
8. A summary of staff responsible for marketing and tenant selection, and any Affirmative Marketing or Fair Housing trainings they have attended.

HUD Forms required for Affirmative Marketing Plans are available as fillable PDFs.

- **Single-family** (1-4 units): <https://www.hud.gov/sites/documents/935-2B.PDF>
- **Multi-family** (5+ units): <https://www.hud.gov/sites/documents/935-2A.PDF>





## HOME Lease Up/Rental Marketing Plan for Developers

### Project Details

**Project Name and Location (including City, State and Zip code)**

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Number of Units and Type of Units (number of beds/baths)	Monthly Rent and List of Utilities included in Rent

**Approximate Starting Dates (mm/dd/yyyy)**

Advertising	Occupancy

**Leasing Agent's Name, Address & Contact (including City, State and Zip Code, Phone & Email)**

--

**Plan Submitted by: X** \_\_\_\_\_

**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_



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HOME Lease Up/Rental Marketing Plan for Developers

**Marketing Plan**

**Commercial Media Advertising:** *(use additional pages as needed)*

Name of Newspaper, Radio, TV Station or Social Media	Size/Duration of Advertising	Frequency of Advertising	Date of First Advert



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**Community Contacts:** *(use additional pages as needed)*

Name of Group/Organization	Name, Phone and Email for Contact Person	Description of Advertising (brochure, presentation, etc.)	Frequency of Advertising	Date of First Advertisement or Action



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HOME Lease Up/Rental Marketing Plan for Developers

**Schedule of Activities**

**Pre-Leasing Plan: Marketing Tasks Before and During Construction** *(use additional pages as needed)*

**Months 1-3 of Construction**

Task	Date of Completion	Responsible Party

**Months 4-6 of Construction**

Task	Date of Completion	Responsible Party

**Months 6-9 of Construction**

Task	Date of Completion	Responsible Party

**Goal for Pre-Leasing of Units before Construction is Complete**

Number of Interested Tenants	Number of Signed Leases	Number of People on Waitlist	Number of Available Units



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HOME Lease Up/Rental Marketing Plan for Developers

**Leasing Plan: Marketing Tasks Once Units are Available** *(use additional pages as needed)*

**Months 1-2**

Task	Date of Completion	Responsible Party
Provide Update on leases to JPDCD	End of each month	Developer

**Months 3-4**

Task	Date of Completion	Responsible Party
Provide Update on leases to JPDCD	End of each month	Developer

**Months 5-6**

Task	Date of Completion	Responsible Party
Provide Update on leases to JPDCD	End of each month	Developer



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HOME Lease Up/Rental Marketing Plan for Developers

**Leasing Strategy – 6 months after project completion** *(use additional pages as needed)*

**Leasing Strategy – 12 months after project completion** *(use additional pages as needed)*

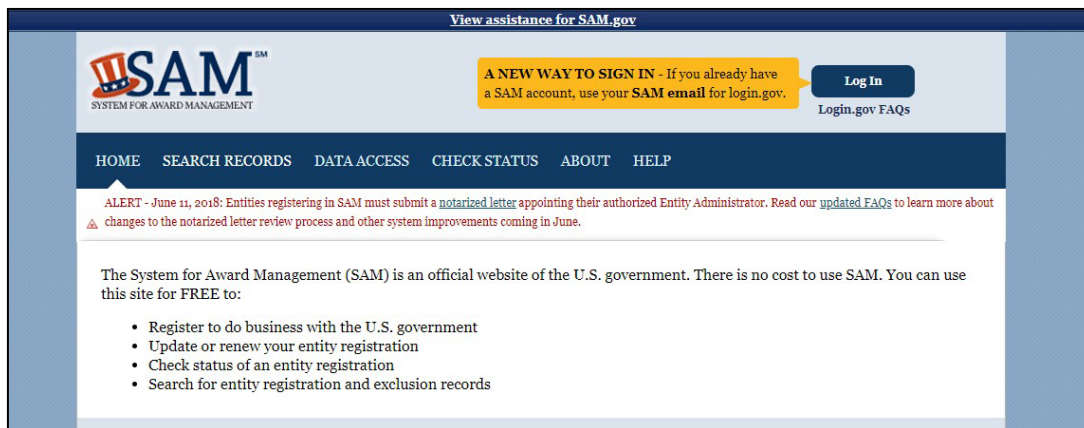
**If HOME units have not been leased 18 months after the project is complete, the project will be in default and the HOME investment must be repaid.**



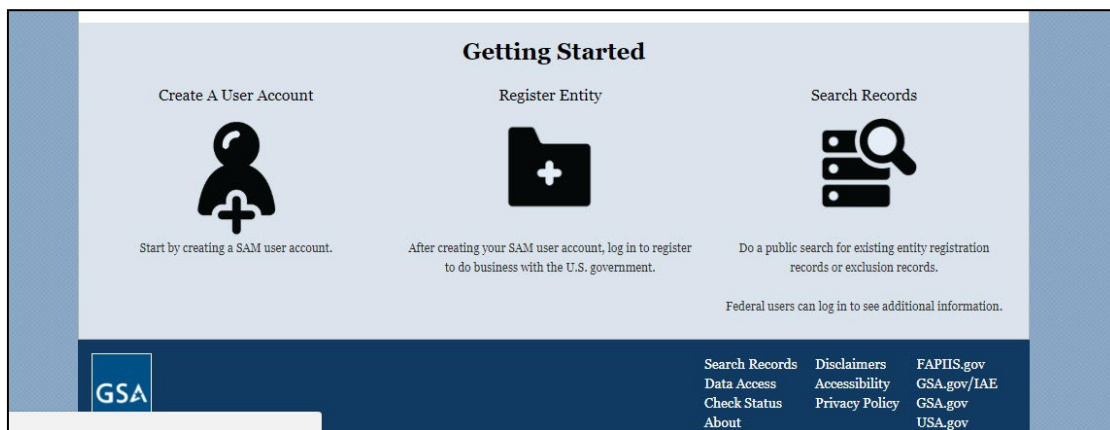
## Sam.gov Registration

### Registration with Sam.gov

1. In your web browser, type [www.sam.gov](http://www.sam.gov). This will bring you to the home page for registration (see screen shot below).



2. You must register as a SAM USER. On the home page, scroll down to the “Getting Started” section and click the first icon on the left. Follow the prompts and submit the required information to create your User ID.



3. Once you have a SAM USER ID, come back to the sam.gov home screen and **select Register Entity** (middle icon under “Getting Started”).
  - a. Follow the prompts and submit the required information for your business. If documents must be submitted in hard copy, send as soon as possible to prevent delays in registration.
  - b. If you need assistance registering on sam.gov, contact the Federal Service Desk at [www.fsd.gov](http://www.fsd.gov), or by telephone at 866-606-8220.
4. Please be aware - you must **renew and revalidate** your registration at least every 12



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months from the date you last certified to and submitted the registration in SAM - and sooner, if your entity's information changes. The primary point of contact email address will receive a message for each entity registration that they have access to in SAM, providing an alert for the renewal requirements at 60 days, 30 days and 15 days prior to expiration. If you do not renew your registration, it will expire. You must have an active SAM registration in order to be eligible to receive contract awards or payments from the Parish on grant-funded projects.