



***FACTOR I***

***CAPACITY OF APPLICANT  
AND RELEVANT  
ORGANIZATIONAL  
EXPERIENCE  
-Alice Henley***

# ***FACTOR I: SUB-FACTORS***

- **Number and Expertise of Staff**
- **Organizational Experience**
- **Performance on Past Projects**

# *Number and Expertise of Staff*

- **Demonstrate capacity**
- **Describe your staffing plan**
- **Provide resumes for all key personnel**

# ***Organizational Experience***



- **Describe your recent projects conducted in the last 3 years**
- **Complete and signed Eligibility form**

# ***EOI –Hispanic Fair Housing Awareness Component***



- **List your bilingual material and services to Hispanics**
- **Identify bilingual staff experience**

# ***EOI –Fair Housing and Minority Homeownership Component***

- **Description of staff's experience in providing fair housing and homeownership awareness**
- **Description of staff's accomplishments in advocating with real estate industry and clients**

# ***PEI OR FHOI APPLICANTS***



- **Describe testing procedures**
- **Provide a general description and overall result of testing**

# *Performance on past projects*



- **Describe your organization's past performance**
- **Discuss your compliance with mandatory referral and reimbursement**

# ***Rating Factor 2***

## ***Need/Distress/Extent Of The Problem***

***-Melody Taylor-Blancher***

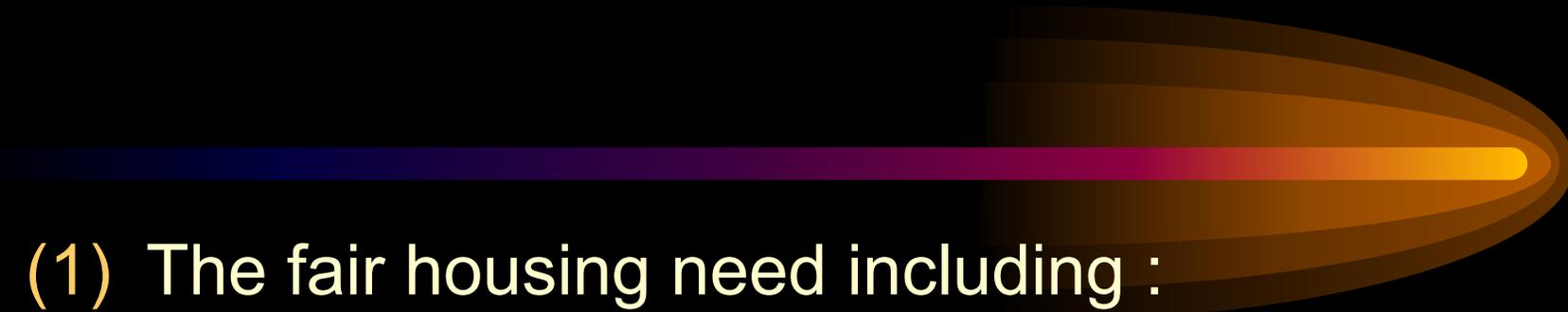


# *NEED/DISTRESS/EXTENT OF THE PROBLEM*

- **Its urgency**
- **Your projects responsiveness to that need**
- **The fair housing need in the geographic area you propose to serve**

*Sub-Factor 1- Documentation  
of Need:*

*PEI/EOI Applicants must  
describe:*



(1) The fair housing need including :

- (i) geographic area to be served;
- (ii) populations that will be served;and
- (iii) the presence of housing  
discrimination in the project area based  
upon all federal protected categories



(2) The urgency of the identified need:

Examples are:

(i) The potential consequences to persons or target areas if your application is not selected

(ii) The extent to which the organizations provide the services identified in the application.



*Other sources that support the  
need and urgency:*

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- References to reports
  - Statistics
  - HUD or Federal government reports/analyses
  - Relevant economic and/or demographic data
  - Studies



*FHOI the sponsoring  
organization must describe  
the following:*

- 
- (i) Populations that will be served as identified by HUD as those projects that will provide fair housing enforcement to underserved areas, rural areas, the Colonias, and areas serving individuals who are immigrants;

- 
- (ii) The presence of housing discrimination, segregation and/or other indices of discrimination in the project area based on the protected classes;



(iii) Why the project area is underserved and why the proposed sponsored organization is needed.

# *Reminders For All Applicants:*



1. If the fair housing needs identified are not covered under the Consolidated Plan (CP) or the Analysis of Impediments (AI) or if your locality does not have either of these documents it should be indicated.

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2. There must be a direct correlation between your proposed activities, community needs and purpose of the program funding.
  3. The data used should be specific to your proposed activities to be carried out.



## Specific FHIP Initiatives:

- EOI- Disability Component
- EOI- Fair Housing Awareness Component
- EOI-Fair Housing and Minority Homeownership Component



## Sub-Factor 2- Under-Served Areas

Up to 5 points will be awarded when the applicant's location and project area are not served by a State or local FHAP agency.

***SUBFACTOR 3 (15 Points)***



***BUDGET AND STATEMENT  
OF WORK***

***-Walter Ayers***

# **Budget and Budget Information**

- **Reasonable vis-à-vis SOW;**
- **Relates tasks in SOW to budget costs;**
- **Cost effective;**
- **Quantifiable and;**
- **Documents & justifies all cost categories**

# *Budget Narrative*

- **Explain each category of budget**
- **Failure to provide results in 2 pt.  
Deduction**
- **Counts toward 10 page limit for  
Factor 3**

***SUBFACTOR 3  
SOUNDNESS OF  
APPROACH***

***40 POINTS***

***-Annette Corley***

# *Point System*



- Support of HUD Goals  
(7 points)
- Proposed Statement of Work and Information Requirements  
(18 points)
- The Budget Form and the Budget Information  
(15 points)

- 
- **Detailed Project Description**
  - **Support HUD Goals**
  - **Performance Measures/Outcomes**
  - **Current Baseline Conditions, and**
  - **Target Levels of Performance Measures that you Plan to Achieve**

# ***SUBFACTOR 1***



## ***SUPPORT OF HUD GOALS***

***7 POINTS***

***IF YOU ARE A  
FAITH-BASED OR  
COMMUNITY-BASED  
ORGANIZATION  
OR  
PARTNER OR SUBCONTRACT  
WITH FAITH-BASED OR  
COMMUNITY-BASED  
ORGANIZATION***

***Total points 4***

# ***APPLICANT SPECIFICALLY ADDRESSES Discrimination***

- **Against New Immigrant—1 point**
- **In Colonias-1 point**
- **Against Homeless-1 point**

**Total points 3**

## ***Subfactor 2***



# ***STATEMENT OF WORK (SOW)***

***18 Points***



# *Rating Factor 4*

*Leveraging Resources*  
*-Charles Wilson*

*Points Will be Awarded on the  
Basis of the Percentage of  
Non-FHIP Resources You  
Have Identified and How Firm  
the Commitment is for Those  
Resources.*

**\*\*5 Points is the Maximum for This  
Factor**

# *Community Resources May Include:*

- Funding or In-Kind Contributions;
- Workspace or Services; or
- Equipment
- Resources Must be allocated to the Purpose of the Proposal
- Contributions from affiliates or employees of the applicant do not qualify as In-Kind Contributions

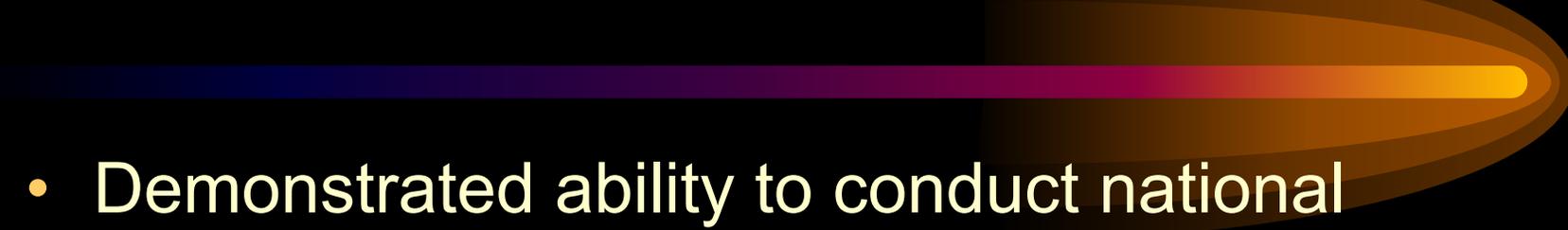
*In Order to Secure Points You  
Must Establish Leveraging by  
Providing Firm Commitment  
Letters That:*

- 
- 1. Identify the Organization or Individual Committing the Resources;
  - 2. Identifying the Source and Amounts of Leveraged Resources;
  - 3. Describe the Use of These Resources in Your SOW;
  - 4. Include the Fair Market Value of the Resources and
  - 5. Describe How the Fair Market Values Were Derived.

# *A National Program*

*- Timm Collier*

# *MAJOR CONSIDERATIONS*



- Demonstrated ability to conduct national education and outreach
- Must partner with a disability advocacy group
- Must develop a complaint referral system
- Demonstrated technical expertise in design and construction requirements of the FHA

# *Demonstrated Technical Expertise*

- Conducted training in design and construction requirements of FHA
- Staff are building inspectors, architects, developers, code officials, etc.
- Work experience with one safe harbor documents

# ***Rating Factor One***



***Capacity and Relevant  
Organizational Experience***

# *Capacity and Relevant Organizational Experience*



- Qualifications
- Organizational resources
- Past experience working with code officials
- Fair Housing Act accessibility requirements
- Fair Housing Act accessibility guidelines
- ANSI, A117.1

# ***Rating Factor Two***



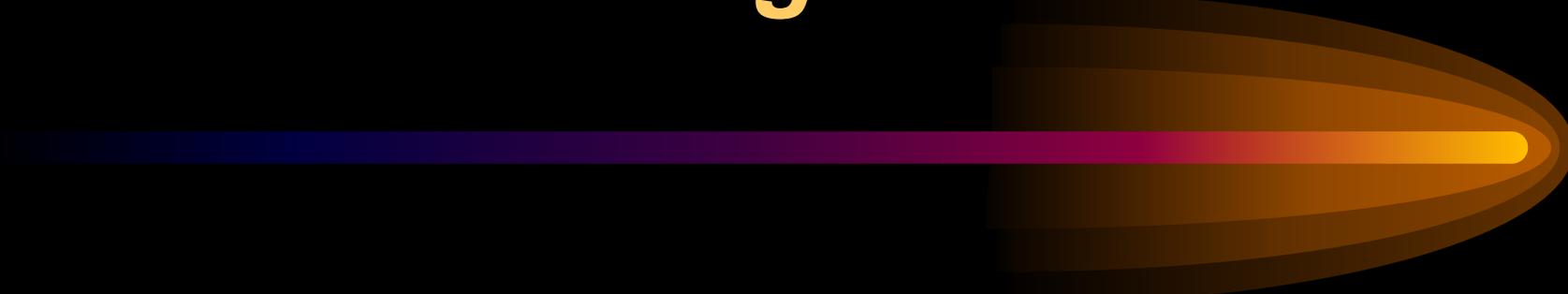
***Need/Approach to the  
Problem***

# *Need/Approach to the Problem*

- Identify areas that show significant amounts of multifamily housing development
- Identify states and local governments that need assistance in developing and modifying language
- Identify State & local jurisdictions with consistent and not consistent with the FHA requirements

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- Identify how to use partners to address needs
  - Identify specific format, methodology and languages needed to assist State & Local jurisdictions

# ***Rating Factor Three***



***Soundness of Approach***

# *Soundness of Approach*



- Identify administrative and program tasks
- Include measurable benefits from project
- Budget document (make sure the math adds up)
- Budget narrative

***Rating Factor Four***

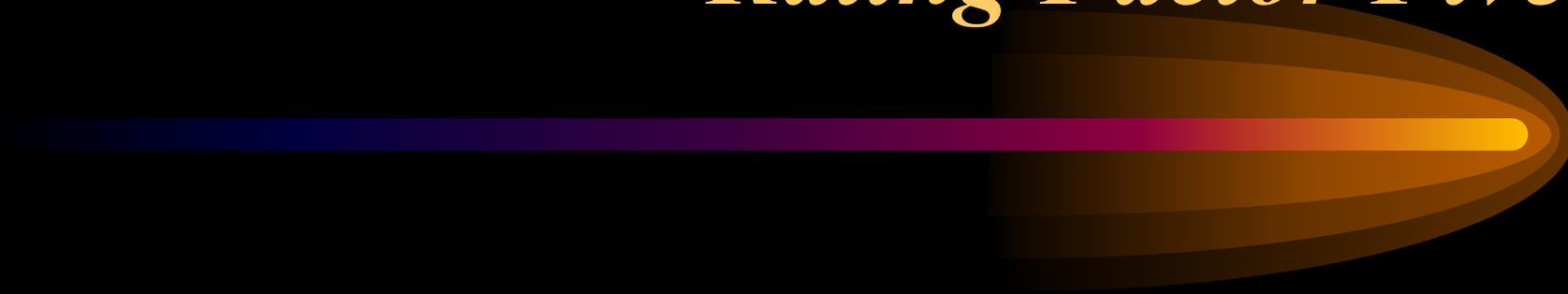
***Leveraging***

# *Leveraging*

- Secure non-FHIP resources
- Can include: \$\$\$ or in-kind contributions
- Letters must include:
  1. Identity of organizations committing funds
  2. Amounts of leveraged resources
  3. Description of how to be used

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- Signed by person legally able to commit resources
  - No points for general support letters

# *Rating Factor Five*



*Achieving Results and Program  
Evaluations*

# *Achieving Results and Program Evaluations*

- Identify projects intended purpose
- Identify methods to evaluate project
- Identify projects' outreach methods
- Identify approaches to encourage adoption of codes