915 Capitol Mall, Room 485 ⦁ Sacramento, CA 95814

(916) 654-6340 ⦁ (916) 654-6033 (Fax)

LOCAL REVIEWING AGENCY (LRA)

**PROJECT EVALUATION FORM**

**2017 Low-Income Housing Tax Credit Application**

(PLEASE USE EXTRA SHEETS AS NECESSARY)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Project Name:** |       |  | Project Number: | CA-17-      |
| **Local Agency:**  |       |
| **Mailing Address:**  |       |
|  |      , CA       |
| **Reviewer’s Name:** |       |
| **Email Address:** |       |
| **Telephone Number:** |       |  | **Fax:** |       |
|  |  |  |  |  |

# Site Information

1). Please confirm the census tract number for the site. Tract #

2). Please list the numbers for the following districts in which the project is located:

|  |  |  |
| --- | --- | --- |
| State Assembly District: |       |  |
| State Senate District: |       |  |
| Federal Congressional District: |       |  |

3). Please describe the existing use of the project site and surrounding area. ***Please attach photos.***

4). Please describe the uses of properties adjacent to the site.

5). Please check the following amenities that are in proximity to the site. Please identify the amenity by name and distance of the amenity from the site in (please indicate if the verification was based on field visit, or mapping information). Distances from project to amenity are measured by a standardized radius from the nearest point of any property line (does not have to be point of ingress/egress), but must not include any physical barriers.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1. ***Bus Rapid Transit Station(s), Light Rail Station(s), Commuter Rail Station(s), Ferry Terminal, Bus Station(s), Public Bus Stop(s):***
 | **Yes** | [ ]  | **No** | [ ]  |
| (Type of stop) | *Distance at or within* | [ ]  ⅓ mile, | [ ]  ½ mile |  |  |
|       |  |  |  |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | ***Any physical barrier(s) present*, *such as freeways and rivers* *that would necessitate a circuitous route to amenity?*** | **Yes** | [ ]  | **No** | [ ]  |
|  | If yes, explain:       |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***b) Public Park(s) or Community Center, Accessible to General Public:*** | **Yes** | [ ]  | **No** | [ ]  |
| (Name/Address) | *Distance at or within* | [ ]  ½ mile, | [ ]  ¾ mile, | [ ]  1 mile | [ ]  1½ miles |
|       |  |  |  |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |
|       |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| (Name/Address) | *Distance at or within* | [ ]  ½ mile, | [ ]  ¾ mile, | [ ]  1 mile | [ ]  1½ miles |
|       |  |  |  |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |
|       |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | ***Any physical barrier(s) present*, *such as freeways and rivers* *that would necessitate a circuitous route to amenity?*** | **Yes** | [ ]  | **No** | [ ]  |
|  | If yes, explain:       |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***c) Book-Lending Public Library(ies):*** | **Yes** | [ ]  | **No** | [ ]  |
| (Name/Address) | *Distance at or within* | [ ]  ½ mile, | [ ]  1 mile, | [ ]  2 miles |  |
|       |  |  |  |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |
|       |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| (Name/Address) | *Distance at or within* | [ ]  ½ mile, | [ ]  1 mile, | [ ]  2 miles |  |
|       |  |  |  |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |
|       |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | ***Any physical barrier(s) present*, *such as freeways and rivers* *that would necessitate a circuitous route to amenity?*** | **Yes** | [ ]  | **No** | [ ]  |
|  | If yes, explain:       |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***d) Public School(s) (elementary, middle, high school), Senior Center or Service Facility(ies) for SRO and Special Needs Population:*** | **Yes** | [ ]  |  **No** | [ ]  |
| (Type of Facility/Name/Address) | *Distance at or within* | [ ]  ¼ mile, | [ ]  ½ mile, | [ ]  ¾ mile, |  |
|  |  | [ ]  1 mile, | [ ]  1½ mile, | [ ]  2 miles |  |
|       |  |  |  |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |
|       |  |  |  |
|       |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| (Type of Facility/Name/Address) | *Distance at or within* | [ ]  ¼ mile, | [ ]  ½ mile, | [ ]  ¾ mile, |  |
|  |  | [ ]  1 mile, | [ ]  1½ mile, | [ ]  2 miles |  |
|       |  |  |  |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |
|       |  |  |  |
|       |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | ***Any physical barrier(s) present*, *such as freeways and rivers* *that would necessitate a circuitous route to amenity?*** | **Yes** | [ ]  | **No** | [ ]  |
|  | If yes, explain:       |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***e) Grocery Store/Supermarket*** (where staples, fresh meat and fresh produce are sold and the interior gross square feet exceed 25,000): | **Yes** | [ ]  | **No** | [ ]  |
| (Name/Address) | *Distance at or within* | [ ]  ½ mile, | [ ]  1 mile | [ ]  1½ miles |  |
|       | [ ]  2 miles | [ ]  3 miles |  |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |
|       | *Approx. Gross Interior Square Footage:* |       |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| (Name/Address) | *Distance at or within* | [ ]  ¼ mile, | [ ]  ½ mile | [ ]  1 mile |  |
|       | [ ]  1½ miles | [ ]  2 miles | [ ]  3 miles |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |
|       | *Approx. Gross Interior Square Footage:* |       |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | ***Any physical barrier(s) present*, *such as freeways and rivers* *that would necessitate a circuitous route to amenity.*** | **Yes** | [ ]  | **No** | [ ]  |
|  | If yes, explain:       |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***f) Neighborhood Market***(where staples, fresh meat and fresh produce are sold gross square feet exceed 5,000): | **Yes** | [ ]  | **No** | [ ]  |
| (Name/Address) | *Distance at or within* | [ ]  ¼ mile, | [ ]  ½ mile, | [ ]  1 mile |  |
|       |  |  |  |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |
|       | *Approx. Gross Interior Square Footage:*       |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | ***Any physical barrier(s) present*, *such as freeways and rivers* *that would necessitate a circuitous route to amenity.*** | **Yes** | [ ]  | **No** | [ ]  |
|  | If yes, explain:       |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***g) Farmers’ Market*** (certified by the California Federation of Certified Farmers’ Markets): | **Yes** | [ ]  | **No** | [ ]  |
| (Name/Address) | *Distance at or within* | [ ]  ½ mile, | [ ]  1 mile, |  |  |
|       |  |  |  |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |
| *List months of operation per calendar year:* |       |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | ***Any physical barrier(s) present*, *such as freeways and rivers* *that would necessitate a circuitous route to amenity.*** | **Yes** | [ ]  | **No** | [ ]  |
|  | If yes, explain:       |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***h) Medical Clinic or Public Hospital:*** | **Yes** | [ ]  | **No** | [ ]  |
| (Name/Address) | *Distance at or within* | [ ]  ½ mile, | [ ]  1 mile, | [ ]  1½ miles |  |
|       |  |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |
|       |  |  |  |
| (Name/Address) | *Distance at or within* | [ ]  ½ mile, | [ ]  1 mile | [ ]  1½ miles |  |
|       |  |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |
|       |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | ***Any physical barrier(s) present*, *such as freeways and rivers* *that would necessitate a circuitous route to amenity.*** | **Yes** | [ ]  | **No** | [ ]  |
|  | If yes, explain:       |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***i) Pharmacy***(can be part of other site amenity, i.e. within a grocery store): | **Yes** | [ ]  | **No** | [ ]  |
| (Name/Address) | *Distance at or within* | [ ]  ½ mile, | [ ]  1 mile | [ ]  2 miles |  |
|       |  |  |
|       |  | [ ]  Field Visit | [ ]  Mapping Method |
|       |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | ***Any physical barrier(s) present*, *such as freeways and rivers* *that would necessitate a circuitous route to amenity.*** | **Yes** | [ ]  | **No** | [ ]  |
|  | If yes, explain:       |

**Land Use/Planning**

### 6). Does the site seem appropriate for the proposed project? Yes [ ]  No [ ]

*If no, please explain:*

### 7). Does the exact parcel exist? Yes [ ]  No [ ]

### 8). Are there any environmental/toxic concerns with the site? Yes [ ]  No [ ]

If yes, please explain, including any environmental studies that have been conducted or clearances that will need to be obtained:

### 9). Are there any other environmental or land use issues associated with the site?

*If yes, please explain:* **Yes** [ ]  **No** [ ]

10). What is the current zoning and maximum number of units allowed for the site?

11). Does the project currently comply with all applicable local land use and zoning ordinances?

*If no, please explain:*  **Yes [ ]  No [ ]**

12). For 9% applications and competitive 4% applications **only**, please complete the following table and confirm (1) all necessary public or tribal approvals subject to the discretion of local or tribal elected officials, and (2) site plan approval and all local land use environmental review clearances (CEQA, NEPA, and applicable tribal land environmental reviews) necessary to begin construction are either finally approved or unnecessary by **June 28, 2017** with appeal periods, if any, expired by **July 28, 2017**.

|  |  |  |
| --- | --- | --- |
| **Action** | **Requirement**(Check if Applicable) | **Date of Approval** |
|  | **Yes** | **No** |  |
| Article 34 of State Constitution |       |       |       |
| Site/Plot Plan Review |       |       |       |
| Design/Architectural Review |       |       |       |
| Parcel Map |       |       |       |
| Conditional Use Permit |       |       |       |
| Variance |       |       |       |
| Change of Zone |       |       |       |
| General Plan Amendment |       |       |       |
| CEQA Review |       |       |       |
| NEPA Review\* |       |       |       |
| Coastal Commission |       |       |       |
| Phase I (Environmental Assessment) |       |       |       |
| Soils Report |       |       |       |
| Other:       |       |       |       |
| Other:       |       |       |       |

\* The “Date of Approval” for NEPA Review represents when the Request for Release of Funds (HUD Form 7015.15) or equivalent was submitted to the federal entity.

13). Are you aware of any state/local approvals still required from the Planning Commission, City Council, or Board of Supervisors for this project? **Yes** [ ]  **No** [ ]

*If yes, please list:*

### 14). For 9% applications and competitive 4% applications only, have all the appeal periods been exhausted for any recent approvals? Yes [ ]  No [ ]

If no, will all appeal periods expire by **July 28, 2017** (The “appeal periods expiring” for NEPA Review represents when the Authority to Use Grant Funds (HUD Form 7015.16) or equivalent was issued)? **Yes** [ ]  **No** [ ]

*If no, please explain:*

### Housing Need & Neighborhood Revitalization and Balanced Communities

15). Is this type of affordable housing needed within the community or region in which it is located? **Yes [ ]  No [ ]**

*Please explain:*

16). Is there a greater need for other types of housing? **Yes [ ]  No [ ]**

*Please explain, including a determination of how need is measured in your community:*

17) Do you believe this project will have a negative impact on the affordable projects in the market area? **Yes [ ]  No [ ]**

*Comments:*

1. Is the market study for this project reasonably accurate in it’s assessment of the demand for this project?  **Yes [ ]  No [ ]**

*Comments:*

19) Is the market study for this project reasonably accurate in its assessment of the projects’ market-rate rent advantage? **Yes [ ]  No [ ]**

*Comments:*

20). Are the building design, outdoor space, landscaping, and amenities proposed appropriate for the community and population targeted? **Yes [ ]  No [ ]**

*Comments:*

21). Is the project located in a Neighborhood Revitalization Area (a federally defined Qualified Census Tract, Empowerment Zone, Enterprise Community or an area that has been designated by a local agency to be the focus of revitalization or similar efforts)?

*Please describe:* **Yes [ ]  No [ ]**

22). If the project is located in a Neighborhood Revitalization Area, have specific efforts towards achieving the plan’s goal occurred?

*Please describe:*

23). Has your jurisdiction adopted an inclusionary zoning ordinance or other initiatives to encourage affordable housing in new growth or high-income areas? **Yes [ ]  No [ ]**

*If yes, please describe:*

24). Will the project benefit the neighborhood? **Yes [ ]  No [ ]**

*Comments:*

### Development Costs and Local Assistance

25). Are the project’s estimated total development costs reasonable for this type of development in your jurisdiction? **Yes [ ]  No [ ]**

*If no, please explain:*

26). Are the real estate taxes in the development budget consistent with local rates?

*Comments:*       **Yes [ ]  No [ ]**

27). Please review Attachment 18(A), the Local Development Impact Fees, in Tab 18. Are they accurate? **Yes [ ]  No [ ]**

*Comments:*

28). A*cquisition and/or Rehabilitation projects:*

a) Does the relocation plan (see Tab 9) address all requirements of state and local law?

*If no, please explain:* **Yes [ ]  No [ ]**

b) If households must permanently relocate, is there adequate alternative housing in the

 immediate area? **Yes [ ]  No [ ]**

*If no, please explain:*

c) Is the budget for paying relocation costs overstated/understated? **Yes [ ]  No [ ]**

*If yes, please explain:*

29). Is your agency providing financial assistance to the project? **Yes [ ]  No [ ]**

If so, do the amounts in the application (page 12-15) reflect the municipality/agency’s contract/commitment amount?  **Yes [ ]  No [ ]**

*If no, please explain:*

If your agency is providing assistance, what is the actual dollar amount and percent of funds to total development cost?

30). Please check the following sources of funds that will be used to assist the project. For non-competitive tax-exempt bond financed (4%) applications, please disregard the “As-of” specified date for the questions below, but still provide a response to each question:

[ ]  HOME Funds

As of June 28, 2017, did the municipality have control of these funds? **Yes [ ]  No [ ]**

*If no, please explain:*

[ ]  CDBG

As of June 28, 2017, did the municipality have control of these funds? **Yes [ ]  No [ ]**

*If no, please explain:*

[ ]  Redevelopment Funds

As of June 28, 2017, did the municipality have control of these funds? **Yes [ ]  No [ ]**

*If no, please explain:*

Did the municipality commit the funds to the project prior to January 1, 2011?

 **Yes [ ]  No [ ]**

*If no, what date were the funds committed?*

Did the municipality have the funds on hand prior to January 1, 2011 **Yes [ ]  No [ ]**

*If no, what date were the funds on hand?*

[ ]  Other *(please identify):*

As of June 28, 2017, did the municipality have control of these funds? **Yes [ ]  No [ ]**

*If no, please explain:*

31). Did any of the above-listed funds come, directly or indirectly, from the applicant or anyone associated with the applicant? **Yes [ ]  No [ ]**

*Comments:*

32). Are the state or federal prevailing wages listed in the development budget accurate?

*Comments:* **Yes** [ ]  **No** [ ]

33). If the municipality is donating land for this development, when did the municipality acquire the land and for what cost?

*Comments:*

Did money for the land, or any financial or other consideration, come to the municipality from the applicant or anyone associated with the applicant? **Yes [ ]  No [ ]**

*Comments:*

34). As of June 28, 2017, were there any outstanding approvals required from the Redevelopment Agency, City Council, or Board of Supervisors for the financial assistance?

*If yes, please explain:*  **Yes [ ]  No [ ]**

###### Developer Experience

35). Are you aware of other projects this developer (See application, page 7) has built in your community? **Yes [ ]  No [ ]**

*Comments:*

Was the developer’s performance satisfactory? **Yes [ ]  No [ ]**

*Comments:*

36). Has the applicant been involved in projects in your community? **Yes [ ]  No [ ]**

*Comments:*

Was the sponsor’s performance satisfactory? **Yes [ ]  No [ ]**

*Comments:*

37). Are you aware of any project the management company (see application, page 7) is currently managing in your community? **Yes [ ]  No [ ]**

*Comments:*

Has the management company’s performance been satisfactory? **Yes [ ]  No [ ]**

*Comments:*

**Other Comments:**

38). Are you aware of any discrepancies between the proposed application and the tax credit regulations?

*Comments:*

39). Additional Comments: (If your agency is reviewing more than one application in the locality, please compare the merits of each application)

*Comments:*

40). What is the LRA’s Recommendation of this project?

**[ ]**  Strongly support **[ ]** Support **[ ]** No position **[ ]** Oppose **[ ]** Strongly oppose

*Please explain:*

|  |  |  |
| --- | --- | --- |
| **Signature:**  |  |  |
| **Print Name:** |       |  |
| **Title:** |       |  |
| **Date:** |       |  |
| **Email:** |       |  |
| **Phone:** |       |  |