



## Instructions for Applicants

The San Luis Obispo County Housing Trust Fund (the “HTF”) encourages potential applicants to call or send an email concerning their project prior to submitting an application. We can advise you of your project’s eligibility for financing and whether we have sufficient funds to meet your needs. Potential applicants should also refer to our loan webpage ([www.sloctf.org/loans.htm](http://www.sloctf.org/loans.htm)) for our Guidelines, Income Limits, Notice of Funds Available (NOFA) and other information prior to contacting us.

The HTF has a short application form, which is available at [www.sloctf.org/files/application.docx](http://www.sloctf.org/files/application.docx) or [www.sloctf.org/files/application.pdf](http://www.sloctf.org/files/application.pdf). This form acts as a cover sheet for your application. Listed below are 1) specific instructions for some of the questions in the application form and 2) a checklist of the various things that we may want you to include as part of your application. Not everything on this checklist is required for every application. Please review this checklist to verify that your application package includes sufficient information for us to review and consider your request. We will accept these items in the format that you have used for other lenders. We may request additional information and third-party reports and studies as part of our review of your application.

**Specific Instructions.** The following information is provided as clarification for items on the application form. Please call or email if you have any questions regarding the application.

Ownership / Site control:	Site control means how you control the site and may include a purchase contract, option, lease or other agreement with the current owner.
DUNS #:	If you have a DUNS number from Dunn and Bradstreet please enter it. Otherwise, enter “None.”
# of Special Needs Units:	See <a href="http://www.sloctf.org/files/special-needs.pdf">www.sloctf.org/files/special-needs.pdf</a> for our definition of Households with Special Needs and indicate how many units will be restricted for households with special needs. Also indicate what special needs group will be served.
# of Jobs to be Created:	Estimates are acceptable.
# of Jobs to be Retained:	Estimates are acceptable.
Incomes to be Served:	See our income limits at <a href="http://www.sloctf.org/files/income-limits.pdf">www.sloctf.org/files/income-limits.pdf</a> and indicate either how many units or what percentage of units will be restricted for households at these income levels. If units will not be restricted, list the units as market rate.
Environmental Status:	Please indicate 1) any environmental studies that have been completed or ordered, 2) whether the project is subject to CEQA or NEPA and the status of such review, and 3) any other environmental information that may be relevant.

### Application Checklist

#### A. Applicant and Owner Information

- Name and address of applicant and owner, if different
- Name of contact person
- Telephone, e-mail and website
- Legal structure of applicant/owner (corporation, partnership, non-profit, government, etc.)
- Organizational documents for applicant/owner (articles, bylaws, partnership agreement, etc.)
- Federal Employer ID Number
- Financial information for applicant/owner (two years taxes/audits plus year to date)

**B. Summary Project Information**

- Description of project (construction, rehab, reuse, rental, transitional, for sale, etc.)
- Number of units (total and affordable)
- Property location (please include a map)
- Amount requested from the HTF
- Requested terms for the loan from the HTF
- Status of local development reviews and approvals
- If a property other than the project site will be used for collateral, also include information on that property

**C. Project Site Description**

- Parcel number
- Zoning and land use classification
- Evidence of site control (ownership, purchase contract, option, etc.)
- A list of any reports or studies completed to date (e.g., soils, environmental assessment, etc.)

**D. Project Development Plan**

- Site plan: attach site plan showing boundaries and location of proposed buildings, elevation design, and floor plans
- Affordability: state the number and percentage of affordable units in the project, including the level of affordability or specified affordability standard
- Information on any special design features such as energy efficiency, sustainability (green design), accessibility or visitability (universal design) or smart growth principle

**E. Project Budget / Financial Information**

- Development pro forma
- Overall sources and uses of funds
- Proposed use(s) for requested funds
- Operating budget (for rental housing projects)
- Projected sales prices and sales schedule (for ownership housing)

**F. Project Schedule / Timeline**

- Overall project schedule or timeline (e.g., site acquisition, pre-development, financing, construction, occupancy, sale, etc.)
- Projected schedule for use and repayment of the loan from the HTF

**G. Management Plans**

- For rental properties that will be placed in service before the HTF loan will be repaid, also include information on the management of the property, including the name and experience of the management staff or agent, and a management plan, if available

**Information or Submission**

Application packages should be submitted to the address listed below. Emailed applications are preferred. Additional information is available online at [www.sloctf.org/loans.htm](http://www.sloctf.org/loans.htm) or can be obtained by contacting Jerry or Kathy by phone or email.

San Luis Obispo County Housing Trust Fund  
71 Zaca Lane, Suite 130, San Luis Obispo, CA 93401

phone: (805) 543-5970  
email: [jerry@sloctf.org](mailto:jerry@sloctf.org) or [kathy@sloctf.org](mailto:kathy@sloctf.org)