



Instructions for Applicants

The San Luis Obispo County Housing Trust Fund (the “Fund”) encourages potential applicants to call and discuss their project with us prior to submitting a formal application. We can advise you of your project’s eligibility for financing over the phone and whether we have sufficient funds to meet your needs. Potential applicants should also refer to our Notice of Funds Available (NOFA), Program Guidelines, Income Limits and other information that is on our website. Please refer to our website – www.sloctf.org/nofa.htm – or call our office at (805) 543-5970 if you have any questions about our loan programs.

The Fund does not have an official application form or specific requirements for applications. We will accept applications in the format that you have used for other lenders or funds. Please review the following checklist to verify that your application package includes sufficient information for us to review and consider. We may request additional information and third-party reports and studies as part of our review of your request.

Application Checklist

A. Application Information

- Name and address of applicant
- Name of contact person
- Telephone, fax number, e-mail and website
- Legal structure of applicant (corporation, partnership, non-profit, government, etc.)
- Federal Employer ID Number
- Financial information for applicant/owner(s)

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 Fund
- Requested terms for the loan from the Fund

C. Project Site Description

- Parcel number
- Zoning and land use classification
- Evidence of site control
- Status of local development reviews and approvals
- A list of any reported or studies completed to date (e.g., soils report, environmental assessment)

D. Project Development Plan

- Site plan: attach site plan showing boundaries and location of proposed buildings, elevation design, and floor plans
- Design features: include any details you feel would make this project attractive and compatible in the neighborhood
- 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.

E. Project Budget / Financial Information

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

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 Fund

Information or Submission

Application packages should be submitted to the address listed below. Additional information is available online at www.sloctf.org or can be obtained by contacting:

Jerry Rioux, Executive Director
San Luis Obispo County Housing Trust Fund
4111 Broad Street, Suite A-6, San Luis Obispo, CA 93401

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