

NH-1

**MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16**

1. **Project Name:** *BUCKELEW-NOVATO HOUSE*
Novato House medication room/office remodel

2. **Total Amount Requested:** \$10,000
 Non-housing proposals must specify the amount requested from each planning area.

3. **Project Sponsor: Buckelew Programs**
Contact Person: Katrin Ciaffa

Title: Development Coordinator

**Mailing Address: 900 Fifth Avenue, Suite 150,
 San Rafael, CA 94901**

Telephone: (415) 526-0409 Ext.
Fax: (415) 721-0281
E-mail: katrinc@bucklelew.org

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$
Novato Planning Area	\$
Richardson Bay Planning Area	\$
San Rafael Planning Area	\$
Upper Ross Valley Planning Area	\$
West Marin Planning Area	\$

Website (optional):

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. **Project Location: (Precise street address).** For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

1333 7th Street, Novato, CA , Parcel #141-120-29 Year built: 1952

5. **Project Description:** Novato House is a group home for 15 adults with mental illness. Buckelew Programs staff provides 24-hour care as needed, including board and care services; independent living skills training, social activities, vocational and educational support, and intensive case management. Funds are needed to complete a necessary remodel of the medication room/office at Novato House, which includes re-carpeting, shelving, painting and furnishings. The medication room/office is where residents access their daily medications and have private meetings with their onsite counseling staff. Staff also stays there over night in case residents have urgent needs.

6. **Total Project Cost:** (Include all costs for this particular project regardless of source.)
 \$10,000

7. Project Budget for CDBG Funds:

Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.

Purchase and install new carpet/ padding -	\$1500
Paint walls	\$500
Repair and scrape all loose paint and any damage	
Prepare and caulk all surfaces for finish	
Primer / Undercoat	
Semi-gloss finish all surface and inside door only	
Replace desk and cabinets for efficiency	\$7,000
Removed all shelves	
Purchase and install new shelves and cabinets	
Remove old desk	
Purchase and install counter tops	
New door with updated lock	\$500
Replace window with energy efficient	\$500
New window	
New molding and sill	
<hr/>	
Total estimated cost:	\$10,000

8. Other Sources of Funds for this Project: Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
None						

9. Project Implementation:

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

The project will be supervised and implemented by Robin Hughes, Site Director. Work can start as soon as funding is received.

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

All residents are referred through Marin County Mental Health and Substance Use Services (MHSUS); they are disabled, have income at or below 30% of median income and meet CDBG income limits. Their income is documented in their resident file. Most have SSI as their only source of income, which currently amounts to approximately \$1,086 monthly – less than 20% of Marin County's median household income, based on 2010 data. Long-term affordability for this project is assured via contract with MHSUS.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800
7	109,900
8	117,000

- B. Project Rationale: *Why is this project needed? Will it assist an especially needy or underserved group?*
 By maintaining homes for the disabled in residential neighborhoods, Buckelew Programs is sustaining a housing pattern that allows low income, mentally disabled residents to live in neighborhoods they would not generally have access to or be able to afford on their own, creating a more fair and balanced residential mix and facilitating community integration of those with severe and persistent mental illness. Many of our residents would be homeless or in an institution if not for Buckelew housing and support services.
- C. Equal Opportunity: *For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)*

Marin County Mental Health and Substance Use Services (MHSUS) monitors the demographics (resident, applicant, census data) of the market area to track race, ethnicity, religion or persons with disabilities for purposes of low-income housing units. They determine if the population least likely to apply for housing is the population identified, then provide advertising most applicable to the demographic groups, and make changes when applicable. According to MHSUS's Mental Health Services Act (MHSA) Community Supports and Services Plan (2006), one of the goals of the MHSA is to increase "outreach and expansion of services to client populations in order to eliminate ethnic disparities and expand access to unserved and underserved individuals". The Latino population has been identified as the largest underserved group in Marin County, and "various strategies such as increased and strategic deployment of bilingual and bicultural staff, cultural competency training and targeted programming have been effective in increasing access to services." For instance, "it is known that many Latinos seek services for mental health problems from primary care health care providers rather than from mental health providers. New strategies such as contracting with Latino-serving organizations for outreach and engagement and providing mental health services within the Latino community, offer promise for better access." Together with its partner MHSUS, Buckelew Programs continues to increase the cultural competence of our workforce through training and targeted job posting for hiring more bilingual/bicultural staff, in order to achieve a higher penetration rate and more adequately serve Latino clients in our housing programs.

(Source:http://www.co.marin.ca.us/depts/HH/main/mh/mhsa_css/CSS_State_version_of_Plan.pdf)

The 2014-2015 Marin County Mental Health Services Act (MHSA) update states:

"A primary goal of MHSA is to better serve un/underserved populations and the County has seen an increase in services targeted at Latinos, older adults, specific geographic parts of the County, and in other respects. Since CSS¹ has been implemented we have seen an increase in services to Latino adults and continued our relatively high level of service to Latino youth. In FY2005-06 Latinos comprised 12.8% of County mental health clients, in FY2010-11 it was 20.4% and in FY2012-13 it is 23.8%. There was not a significant change in rates for other ethnic populations. MHSA has allowed for an increase in bilingual staff across CSS and PEI² programs."

(https://www.marinhhs.org/sites/default/files/files/servicepages/2014_04/mhsa_annual_update_fy14-15.pdf)

If this project involves housing, how will it affirmatively further fair housing?

See above. In addition, by maintaining homes for the disabled in residential neighborhoods, Buckelew Programs is sustaining a housing pattern that allows low income, mentally disabled residents to live in neighborhoods they would not generally have access to or be able to afford on their own, creating a more fair and balanced residential mix and facilitating community integration of those with severe and persistent mental illness. Staff also regularly attend trainings at Fair Housing Marin to stay current on laws and regulations.

¹ Community Supports and Service Program

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people.

No new construction is involved in this project.

D. Accessibility: *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*

100% of Buckelew's clients have mental health disabilities. All efforts will be made to accommodate people with physical disabilities, which may include moving them to fully accessible homes like our Avanti House as needed.

E. Green Building: *For new construction or rehabilitation, what will you do to incorporate "green building" principles?*

Green building techniques will be utilized wherever possible.

- For further information, please call Roy Bateman (473-6698). It's ok to call with any questions at any time.
- The current year's application form must be used.
- Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.
- **Applications sent by fax or e-mail will not be accepted.**
- This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence. If you'd like to download this form as a Microsoft Word document, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.
- Don't forget to fill out the Organization Profile form.
- All County publications are available in alternative formats (Braille, large print, or CD) upon request. Requests for accommodations may be made by calling (415) 473-4381 (Voice), 473-3232 (TDD/TTY), or by e-mail at disabilityaccess@marincounty.org. This form and other County documents are available in alternative formats upon request.

DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: Buckelew Programs

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	99
Low income people	1
People above the low income limits	0

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
Ethnic/Racial Demographics						
Asian-American/Pacific Islander	3	4	2	1		n/a
African-American/Black	7	4	2	2		
Caucasian/White	89	92	95	96	100	
Native American	1		1	1		
Mixed Heritage						
Unknown/other						
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						
Of Latino/ Hispanic Origin	6	2	3	4		
NOT of Latino/ Hispanic Origin	94	98	97	97	100	
TOTAL %	100%	100%	100%	100%	100%	100%
Age						
0-5 years old						
6-17						
18-24	10	2				
25-59	80	94				
60 +	10	4				
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						
Female	40	40	60	60	60	
Male	60	60	40	40	40	
Total %	100%	100%	100%	100%	100%	100%
Disabled %						
	100	100				

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	0 clients but 40% family members
On Advisory Committee	n/a

Organization Profile – 2015-16 Data Collection Pilot

Income Limits

Household Size	Very Low Income Limit (≈50% of Median Income)	Low Income Limit (≈80% of Median Income)
1	38,750	62,050
2	44,300	70,900
3	49,850	79,750
4	55,350	88,600
5	59,800	95,700
6	64,250	102,800

NH-2

**MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16**

- HABITAT - 445 ST.
1. **Project Name:** Mt. Burdell Place
3. **Project Sponsor:** Habitat for Humanity Greater San Francisco

2. **Total Amount Requested:** \$100,000
 Non-housing proposals must specify the amount requested from each planning area.

Contact Person: Stacey Laumann

Title: Project Manager

Mailing Address: 500 Washington St., #250
 San Francisco, CA 94111

Telephone: (415) 625-1044 Ext.

Fax: (415) 625-1815

E-mail: slaumann@habitatgsf.org

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$
Novato Planning Area	\$
Richardson Bay Planning Area	\$
San Rafael Planning Area	\$
Upper Ross Valley Planning Area	\$
West Marin Planning Area	\$

Website (optional): www.habitatgsf.org

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. **Project Location: (Precise street address).** For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

- **Street Address:** 1112 4th Street, Novato, CA 94945
- **Assessor's Parcel Number:** 141-242-29
- **Construction Date:** Habitat for Humanity Greater San Francisco broke ground at this location on September 23, 2014. The construction period is anticipated to be approximately 28 months, with projected completion in December 2016.

5. **Project Description:**

"As a means to building wealth...there is no practical substitute for homeownership."
 – New York Times, 11/30/14ⁱ

Habitat for Humanity Greater San Francisco (Habitat GSF) is requesting HOME funds for Mt. Burdell Place, which is currently under construction in the Novato Planning Area. Mt. Burdell Place is centrally located just two blocks from Grant Avenue where future residents can easily access transportation, shops, local services, parks, and amenities. The approximately 30,000-square-foot (0.69 acre) site sits amidst a residential neighborhood of single- and multi-family residences. For many years, the property has been vacant and unmaintained.

Designed by Novato-based Daniel Macdonald AIA Architects, each Mt. Burdell Place home will have a living area, half-bath, and garage on the lower floor, and three bedrooms and two baths on the second floor. All homes have backyards, and families will also have access to a 2,400-square-foot common green area at the front of the property.



These 10 affordable single-family homes will help sustain the Marin County economy by providing long-term affordable housing options for lower-wage employees like teachers, first responders, and health care workers—earning 55%-80% of the area median income. Additional funding procured by Habitat GSF from public, private, and community sources will allow further reduction of mortgages to our families.

Mt. Burdell Place will allow families build limited equity and bolster their financial security through the Habitat model which offers no down payment and zero-interest loans. These predictable housing payments will never exceed a third of the families' income. In lieu of a monetary down payment, families will work alongside community volunteers and their future neighbors, donating 500 hours of "sweat equity" to build their own community.

The benefits of homeownership will extend beyond these families.

- Homeowners invest **time** in their communities. Compared to renters, they are more likely to vote, live in their neighborhoods for longer, and become involved in community organizations.ⁱⁱ
- Homeowners invest **money** in their communities. In 2013, Habitat GSF homeowners paid \$477,640 in property taxes—providing support for schools, parks, roads, bridges, and police and fire departments.
- A Habitat home means a **healthier community**. Our "green" homes will create a healthier neighborhood—reducing energy use, limiting harmful emissions, and eliminating excessive water usage. And if commute distances to work are reduced by working *and* living in Marin, carbon emissions will also be reduced.

Mt. Burdell Place fulfills several goals set forth in the 2015-2023 draft Housing Elements of the City of Novato and Count of Marin.

1. Mt. Burdell Place uses land efficiently by being an "urban infill" development on a vacant lot.
2. By providing opportunities for affordable homeownership, Mt. Burdell Place helps Marin County meet housing needs through a variety of housing choices.

6. Total Project Cost: (Include all costs for this particular project regardless of source.)

Uses	Budget	% of Project Cost
General Project Requirements	\$ 815,700	13%
Sitework (includes offsite)	\$ 820,809	13%
Concrete	\$ 94,000	2%
Masonry	\$ -	0%
Metals	\$ 3,500	0%
Wood and Plastics	\$ 322,600	5%
Thermal and Moisture	\$ 106,600	2%
Doors and Windows	\$ 120,800	2%
Finishes	\$ 180,200	3%

ORIGINAL

Specialties	\$ 18,750	0%
Equipment	\$ 27,500	0%
Furnishings	\$ -	0%
Special Construction	\$ 125,000	2%
Mechanical	\$ 276,350	5%
Electrical	\$ 129,500	2%
Contingency Reserve	\$ 250,000	4%
Land Acquisition	\$ 852,889	14%
Developer Administration	\$ 585,370	10%
Soft Costs	\$ 1,559,810	25%
Gifts in Kind	\$ (169,625)	-3%
Total Development Budget	\$ 6,119,753	100%

7. Project Budget for CDBG Funds:

Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.

Habitat for Humanity Greater San Francisco respectfully requests a CDBG allocation of \$100,000 to write down the mortgage principal of two homes in this development so that we can serve more families earning on the lower end of the 55-80% AMI range. Habitat will match that \$100,000 through our ability to leverage local private funding in order to serve this low income need, and offer two homes affordable to households earning up to 65% AMI. Despite robust funding secured to date, additional funds are necessary to in order for Habitat to be able to offer homes to the lowest income buyers. A substantive, and CDBG funding will measurably reduce the total principal mortgage to two homebuyers. This objective is consistent with HUD 570201-N guidelines, which allows funds to be used to reduce the first mortgage, serve lower income, and/or reduce funding gaps in the project.

Mortgage affordable to 70% buyer	\$266,000
CDBG \$50,000 principal write-down	-\$50,000
Mortgage affordable to 65% buyer	\$216,000

8. Other Sources of Funds for this Project: *Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?*

Each Habitat Greater SF development brings a significant amount of private and corporate foundation funding to the county in which we build. For the 36 townhomes we most recently completed in Daly City, we raised \$1,123,775 in corporate contributions and another \$360,500 in foundation funding. Mt. Burdell Place will bring the same level of private investment to the City of Novato, and increase Marin donor's awareness of the need and benefits of for affordable housing in this community.

To date, 39% of the money we have raised for Mt. Burdell Place has come from local foundations, corporations and community support of Habitat for Humanity Greater San Francisco, and we estimate that percentage will increase to 70% by project's end.

The table below lists funds received and committed to date.

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
CDBG 2013-2014	Site acquisition	\$ 97,431	December 13, 2012	Yes	May 7, 2013	May 7, 2013
CDBG 2014-2015	Off-site design expenses	\$ 22,850	December 2013	Yes	May 2014	2015
City of Novato Affordable Housing Trust Fund	Second mortgage assistance	\$ 427,438	2012	Yes	November 13, 2012	Early 2015
Marin Community Foundation	Site acquisition	\$ 541,500	2012	Yes	April 4, 2013	Drawn 2013
Marin Workforce Housing Trust	Construction expenses	\$ 595,000	November 13, 2013	No	N/A	2015
CalHome (HCD)	Mortgage assistance	\$ 600,000	2013	Yes	2013	Occupancy (2017)
SHOP (HUD)	Water fees	\$ 111,600	September 12, 2013	Yes	December 2013	2014
Habitat GSF operating budget	Construction expenses	\$1,029,000	N/A	Yes	July 2013	FY 2013-2014
Habitat community support	Construction expenses	\$ 125,000	2014	Yes	2014	Received
Tamalpais Pacific Foundation	Water fees	\$ 50,000	Spring 2014	Yes	Fall 2014	Drawn 2014
PG&E	Solar panels	\$ 100,000	Spring 2014	Yes	Spring 2014	2016
California Advanced Home Energy Program	Energy efficiency	\$ 4,500	Fall 2014	Yes	Fall 2014	2016
Total Committed		\$3,704,319				

9. Project Implementation:

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

As with all our developments, Habitat GSF will serve as the general contractor, developer, and mortgage lender for Mt. Burdell.

- The real estate development department conducted due diligence, secured site control from the seller, coordinated design consultants, finalized site design, secured required permits from municipal agencies, and is facilitating procurement of public and private grant funding.

- Real estate development staff work closely with the fund development team to identify and solicit potential funders.
- Our construction team provides oversight of all construction-related work including finalizing designs in the predevelopment phase, managing the construction schedule, and overseeing all subcontracted and volunteer work.
- Construction staff work closely with the volunteer services team to schedule and utilize volunteer labor efficiently.
- Our homeowner development team will oversee the qualification, approval, and readiness of all homeowners, including a review of their financial status, job history, residency, and other qualifications. This also includes coordinating our Homebuyer Readiness workshops in Marin County.
- Our finance team will handle intake of all mortgage payments.

The development broke ground in late September 2014. Our schedule for project implementation is as follows:

Activity	Start Date	Completion
Purchase offer accepted	9/26/2012	n/a
Close of Escrow	6/13/2013	n/a
Submitted for Final Map and Building Permits	10/31/2013	7/22/2014
Excavation of Land	10/1/2014	3/30/2015 (pending weather)
Infrastructure built	1/15/2015	6/30/2015 (pending weather)
Vertical construction	4/1/2015	12/30/2016
Occupancy by homeowners	1/1/2017	3/1/2017

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800
7	109,900
8	117,000

“Residential segregation in Marin is one particular area of extreme disadvantage for those with few assets: when low-income families end up in neighborhoods with older housing stock and a low tax base, it hampers their ability to build wealth through equity in their homes...it is also a disadvantage in access to quality educational opportunities—which then translate into lower earnings.”

– A Portrait of Marin: Marin County Human Development Report
2012

The families who purchase Mt. Burdell Place homes will be earning 55-80% of the area median income, which is \$58,685-\$88,600 for a family of four. According to the draft of the Marin County Housing Element 2015-2023, workers who fall into this income range include electricians, carpenters, legal secretaries, civil engineering technicians, and child, family, and school social workers. These are members of the county’s essential workforce who are otherwise priced out of the real estate market. In October 2014, the median price of a single-family detached home was \$995,000 and the median price of a condominium or townhome was \$481,000.ⁱⁱⁱ

For applicant families, Habitat GSF requires the following documentation to verify income:

- The most recent two years of federal tax returns (if self-employed, Schedule Cs).
- The most recent three months of pay stubs.

- The most recent three months of bank statements.
- Documentation of other types of income, including AFDC, TANF, food stamps, Social Security, disability, alimony (received), child support (received), unemployment, percentage of liquid (cash) assets over \$15,000, and recurring gifts.

Our volunteer Family Selection Committee (composed of 30 individuals and led by Habitat staff) carefully reviews each application and performs in-home family interviews to determine eligibility for the Habitat program. The Family Selection Committee cross-references the above documents with further information gathered in the official application to determine a family's financial eligibility wherein a steady income is demonstrated, and good credit and low debt-to-income ratio is essential. Habitat also uses standard underwriting guidelines defined by the Federal Housing Authority (FHA).

When a family purchases a home through the Habitat program, their mortgage payments (including taxes and insurance) are never more than 30% of their monthly income, which will keep the home affordable for the family over the long term. Affordability restrictions will be imposed for 55 years, and renew with each property transfer to new owners. Habitat GSF maintains the first right to repurchase the home, thereby ensuring that the homes remain affordable to subsequent first-time homebuyers.

Of the approximately 245 families that Habitat GSF has served in its 25-year history, none have foreclosed on their homes.

B. Project Rationale: Why is this project needed? Will it assist an especially needy or underserved group?

“It’s more than just a home, you know? It’s a future. It’s stability for the kids.” – Amanda Parker (pictured below), who has been living in a Habitat GSF home for one year ¹

“We used to have, like, only one room, so that we couldn’t actually do stuff a lot. We had to eat on our bed.” – Matteo Parker (second from right)

Homeownership has a tremendous impact on families and communities. Compared to families who rent, children of homeowners are 116% more likely to graduate from college.^{iv} Once a home is purchased and occupied, spending by homeowners generates 53 additional jobs and \$743,000 in annual income.^v But for Marin’s low-income families, owning a home is well out of reach. In fact, only 60% of Marin’s workforce can afford to live here.^{vi} Instead, they live the farthest from their jobs of any Bay Area workforce, spending hours commuting, away from their families.^{vii} This geographic dispersion makes them—and their children—much less likely to have income mobility.^{viii}



Even if they aren’t commuting, the region’s teachers, police officers, medical assistants, and construction workers are paying skyrocketing rents, often for substandard and/or crowded housing. Of the county’s low-income (40-80% AMI) families of four who are renting, 80% are spending more than 30% of their income on housing, leaving little for child care, health care, savings and educational opportunities for themselves or for their children.^{ix}

Mt. Burdell Place will help low-income families build financial capital and stability while living close to their jobs and their children’s schools.

C. Equal Opportunity: For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)

Nationwide, there are gaps in white-minority homeownership rates: there are 29.5 percentage points between white and African American homeowners and 27.3 percentage points between white and Latino homeowners for example.^x

According to the Marin County Analysis of Impediments to Fair Housing Choice (AI), black and Latino renters and families with children experience discrimination and differential treatment in the county's housing market. The draft of the Marin County Housing Element 2015-23 states that affordably priced housing for larger families (5+ people) is particularly hard to find, because larger homes are too expensive and there is limited stock of rental units with three or more bedrooms.

Habitat GSF takes several steps to ensure that we are reaching these groups as well as others who may be experiencing discrimination such as families who speak English as a second language.

- HHGSF leverages our advertising, public relations, e-communications, website and social media channels to maximize our reach to qualified potential partner families for each of our developments. Emphasis is placed on recruiting families from diverse backgrounds and ethnic populations through targeted outreach activities and specialized media outlets. Materials are provided in three languages: English, Spanish, and Chinese.
- The outreach for Mt. Burdell Place in Novato will include targeted mailings to interested applicants on our mailing list and churches, schools, neighborhood associations, and community organizations that serve people with low incomes. Specifically, special marketing outreach consideration shall be given to the following underserved populations, as identified in the AI: Canal Alliance and Church of Saint Raphael (Latino), Marin City Community Development Corporation and Marin City Health and Wellness Center (African American), and Asian-owned businesses. A mailing of 1,000 postcards will also be sent to all renters in and around the area of the proposed development site.
- Countywide outreach for the development will be tailored to the ethnic and cultural diversity of the area, and include the following efforts: advertising in local print and online publications, including Sing Tao, El Mensejaro, the Marin Independent Journal, and the Novato Patch, among others. Advertising will also be dispersed across the Marin Transit and Golden Gate Transit fleet of buses, and at local libraries. Emails and mail notifications will be sent to Marin County affordable housing advocates and tenant action groups. Habitat GSF will also contact civic organizations that represent people with disabilities and the elderly.
- We will also continue to conduct Homebuyer Readiness workshops in Marin County in advance of the application process in order to prepare families for a successful application. The most recent series was conducted in San Rafael in September 2014, with another series planned for April 2015 in San Rafael and May 2015 in Novato. The workshops center on the basics of financial literacy and include topics of understanding credit, managing debt, and best practices for money management and savings. These classes are free to participants and are available to prospective Habitat partner families as well as the general public. Participants receive free credit reports—which many will be seeing for the first time—along with our in-depth analysis detailing problem areas and how to resolve them. They also receive six-month follow-up reports and analyses. They will be encouraged to call our expert bilingual staff with their questions. This one-on-one credit counseling is free. Information on the workshops will be/has been sent to the Marin Housing Authority, local agencies, community organizations and libraries. All advertising displays the Equal Housing Opportunity and Equal Access logos.

If this project involves housing, how will it affirmatively further fair housing?

Habitat GSF will not discriminate against any individual or family because of race, color, national origin, religion, sex, disability, familial status, or presence of children in a household. Reasonable accommodations will be offered to all disabled persons who request accommodations due to disability at any time during the application and homeowner selection process. The Equal Housing Opportunity and Equal Access logo and clause will be included in all advertisements, printed materials, applications, and is on our website.

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people.

(1) Construction of Habitat GSF homes utilizes 80% to 90% volunteer labor, including 500 hours from each of our partner families. For the remaining subcontracted work, Habitat will seek three bids on contracts over \$25,000. We will circulate the request for proposals to local women- and minority-owned firms.

Three of our eight construction management staff are women (37%): two of our four construction managers and our electrical site manager. Our AmeriCorps contingent includes people of diverse backgrounds, ages, socio-economic standing, genders, and races (<http://blog.habitatgsf.org/2014/09/15/meet-your-ameri-corps>).

(2) Habitat GSF will be expanding out Construction Internship Program to Novato in the coming year. Our 8 to 12-week internships provide young adults ages 17-24 with transferable skills to help them enter careers as plumbers, electricians, project managers, and carpenters. The five components are General Construction, Residential Plumbing, Residential Electrical, Finish Carpentry, and Construction Leadership. We expect to attract and retain 20 interns who will work at our Mt. Burdell Place site in 2015.

D. Accessibility: *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*

Habitat GSF will work directly with each partner family during the construction process to make sure all their current or future accessibility needs are met. Most Habitat homes are built to universal design standards. However, because this project's design was inherited from a prior developer, homes may require adaptation specific to individual needs. We will make adjustments for reasonable accommodations upon request.

E. Green Building: *For new construction or rehabilitation, what will you do to incorporate "green building" principles?*

Like all Habitat GSF properties, Mt. Burdell Place will be rated through Build It Green's stringent GreenPoint Rated system, which awards points for energy efficiency, resource conservation, indoor air quality, water conservation, and walkable neighborhoods. Mt. Burdell Place will exceed Title 24 standards by at least 15% and have green features including:

- Recycled fly ash in concrete mixes and permeable paving systems to facilitate stormwater management for driveways and walkways.
- Fiber cement siding.
- Low VOC paints, caulks and adhesives.
- Energy Star appliances (bath fans, washer/dryers, dishwashers), solar panels (donated by PG&E and installed by Grid Alternatives), high efficiency HVAC filters, on-demand Rinnai tankless water heaters, Water Sense low-flow toilets and faucets, and water restrictive devices.
- Native, drought-tolerant plants and shade trees.

Mt. Burdell Place is targeting a GreenPoint Rated score of 121 points. Our most recently completed development in Daly City received a GreenPoint Rated score of 119 points. We recycled or reused 43% of the materials generated from the Daly City construction site—more than 65 tons of concrete, drywall, metal, wood, and plant debris.

Thank you for your consideration of our request.

-
- For further information, please call Roy Bateman (473-6698). It's ok to call with any questions at any time.
 - The current year's application form must be used.
 - Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.
 - **Applications sent by fax or e-mail will not be accepted.**

- This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence. If you'd like to download this form as a Microsoft Word document, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.
- Don't forget to fill out the Organization Profile form.
- All County publications are available in alternative formats (Braille, large print, or CD) upon request. Requests for accommodations may be made by calling (415) 473-4381 (Voice), 473-3232 (TDD/TTY), or by e-mail at disabilityaccess@marincounty.org. This form and other County documents are available in alternative formats upon request.

DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

k:\cycle\2015 cycle\applications fy15\2015-16 cdbg application form.doc

ENDNOTES

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- ⁱ The Editorial Board. Homeownership and Wealth Creation. New York Times, November 30, 2014.
 - ⁱⁱ DiPasquale, Denice; Glaser, Edward L. "Incentives and Social Capital: Are Homeowners Better Citizens?" Harvard Institute of Economic Research Working Papers 1815, Harvard – Institute of Economic Research, 1997.
 - ⁱⁱⁱ County of Marin Assessor. Real Estate Sales October 2014.
 - ^{iv} Boehm, Dr. Thomas P., and Schlottmann, Dr. Alan. Wealth Accumulation and Homeownership: Evidence for Low-Income Households. US Department of Housing and Urban Development. December 2004.
 - ^v Schwartz, Alex F. Housing Policy in the United States. New York: Routledge, 2010.
 - ^{vi} La Ganga, Maria. Affordable Housing Is Again a Red Flag in "Green" Marin County. Los Angeles Times, 3/31/13.
 - ^{vii} Miles from Home: The Traffic and Climate Impacts of Marin's Unaffordable Housing. Live Local Marin, February 2011.
 - ^{viii} Pender, Kathleen. How Much Income Do You Need to Buy a Home in the Bay Area? Sfgate.com, 2/18/14.
 - ^{ix} Draft Marin County Housing Element 2015-23.
 - ^x The State of the Nation's Housing 2014. Joint Center for Housing Studies of Harvard University.

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: Habitat for Humanity Greater San Francisco

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	100% (To date, we have served families earning no more than 60% AMI, which covers both low- and very-low income people.)
Low income people	
People above the low income limits	

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
Ethnic/Racial Demographics						
Asian-American/Pacific Islander	22%			15%	4%	
African-American/Black	11%			3%	4%	
Caucasian/White	8%			69%	82%	
Native American	1%			0%	0%	
Mixed Heritage	N/A			N/A	N/A	
Unknown/other	58%			13%	10%	
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						
Of Latino/ Hispanic Origin	54%			10%	5%	
NOT of Latino/ Hispanic Origin	46%			90%	95%	
TOTAL %	100%	100%	100%	100%	100%	100%
Age						
0-5 years old						
6-17						
18-24						
25-59						
60 +						
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						
Female				79%	30%	
Male				21%	70%	
Total %	100%	100%	100%	100%	100%	100%
Disabled %						

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	0%
On Advisory Committee	0%

NH-3

**MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16**

1. **Project Name:** *LIFEHOUSE-* Sunrise I

2. **Total Amount Requested:** \$10,800
Non-housing proposals must specify the amount requested from each planning area.

3. **Project Sponsor:** Lifehouse

Contact Person: Brent Kush

Title: Director of Finance and Administration

Mailing Address:

899 Northgate Drive, Suite 500
San Rafael, CA 94903

Telephone: 415 526-5308 **Ext.**

Fax: 415 472-5739

E-mail: bkush@lifehouseagency.org

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$
Novato Planning Area	\$
Richardson Bay Planning Area	\$
San Rafael Planning Area	\$
Upper Ross Valley Planning Area	\$
West Marin Planning Area	\$

Website (optional):

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. **Project Location: (Precise street address).** For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

Address: 627 Wilson Avenue, Novato, CA 94947

Parcel Number 146-291-10

This is an approximately 60 year old house.

5. **Project Description:**

This is a home that is licensed by Health Care Licensing for six adults with severe and profound developmental disabilities. Several of the residents use wheelchairs for mobility and have very limited mobility. One of the bathrooms is in extremely poor condition due to the wear and tear by residents, most of who are in wheelchairs. The bathroom requires demolition of the existing main shower/main bathroom.

6. **Total Project Cost:** (Include all costs for this particular project regardless of source.) \$ 10,800

7. Project Budget for CDBG Funds:

Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.

1. Tear out the existing bathroom and dispose of materials.
2. Install new fan and recessed lights
3. Install new floated mud deck for floor tile, 2X2 non-spip.
4. Install dense shield drywall in bath enclosure. Tile with 6X6 DalTile.
5. Change shower fixture and install new sink and toilet
6. Install dense shield wall border.
7. Paint bathroom.

8. Other Sources of Funds for this Project: Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
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9. Project Implementation:

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

Lifeshouse administrative staff will work with a contractor to schedule the work. Bids will be obtained and the lowest/most qualified bid will be awarded. The project should take approximately one month to complete.

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800
7	109,900
8	117,000

This is a licensed group home for 6 adults with developmental disabilities who have severe and profound medical and self care needs. . The individuals who live here are considered at the "extremely low income" level. They do receive MediCal. The home is owned by Lifeshouse, a non-profit agency providing residential services to individuals with developmental disabilities

B. Project Rationale: Why is this project needed? Will it assist an especially needy or underserved group?

Funding for all projects has been negatively affected by the economic downturn and also the cuts and frozen rates from the state for the services provided by Lifeshouse. There have not been funds to make needed repairs.

- C. Equal Opportunity: For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)

The residents of this home are referred by the regional center/state of California. Lifehouse has a policy of non-discrimination in who it serves.

If this project involves housing, how will it affirmatively further fair housing?

The individuals who live here all have disabilities and are considered extremely low income. The home will always house people from this population.

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people.

Lifehouse does not discriminate in the selection of contractors. Lifehouse has a policy of non-discrimination when it comes to contracting work. In recruiting contractors, minorities are always considered.

- D. Accessibility: What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?

All the residents of the home have disabilities. Many of them have physical disabilities necessitating the use of wheelchairs. This home will always be designated as a home for people with developmental disabilities.

- E. Green Building: For new construction or rehabilitation, what will you do to incorporate "green building" principles?

A consultant on "green" construction will be consulted and all available materials will be used to accomplish "green" objectives. Lifehouse as the owner is a nonprofit agency.

- For further information, please call Roy Bateman (473-6698). It's ok to call with any questions at any time.
- The current year's application form must be used.
- Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.
- **Applications sent by fax or e-mail will not be accepted.**
- This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence. If you'd like to download this form as a Microsoft Word document, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.
- Don't forget to fill out the Organization Profile form.
- All County publications are available in alternative formats (Braille, large print, or CD) upon request. Requests for accommodations may be made by calling (415) 473-4381 (Voice), 473-3232 (TDD/TTY), or by e-mail at disabilityaccess@marincounty.org. This form and other County documents are available in alternative formats upon request.

DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

Organization Profile - 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: Lifecare, Inc - Sunrise II House, Novato

My organization does not gather demographic data. My organization does not wish to share demographic data.
 For group homes only - not entire organization

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	100%
Low income people	
People above the low income limits	

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
Ethnic/Racial Demographics						
Asian-American/Pacific Islander						
African-American/Black						
Caucasian/White		100%				
Native American						
Mixed Heritage						
Unknown/other						
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						
Of Latino/ Hispanic Origin						
NOT of Latino/ Hispanic Origin		100%				
TOTAL %	100%	100%	100%	100%	100%	100%
Age						
0-5 years old						
6-17						
18-24						
25-59		66%				
60 +		34%				
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						
Female		50%				
Male		50%				
Total %	100%	100%	100%	100%	100%	100%
Disabled %						
		100%				

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	
On Advisory Committee	

NH-4

MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16

1. Project Name: Mackey Terrace

2. Total Amount Requested: \$250,000.00

3. Project Sponsor: EAH Inc.

Non-housing proposals must specify the amount requested from each planning area.

Contact Person: Lynn Berard

Title: Senior Project Manager

Mailing Address:

2169 E. Francisco Blvd., Suite B
San Rafael, CA 94901

Telephone: 415-295-8825 Ext.

Fax:

E-mail: lynn.berard@eahhousing.org

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$
Novato Planning Area	\$
Richardson Bay Planning Area	\$
San Rafael Planning Area	\$
Upper Ross Valley Planning Area	\$
West Marin Planning Area	\$

Website (optional):

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. Project Location: (**Precise street address**). For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

Address: 626 Owens Drive, Novato, CA 94949
Constructed: 1992
APN: 160-150-55 and 160-150-56

5. Project Description:

Mackey Terrace is located on 2.47 acres on Owens Drive in Novato. The property is improved with a 3 story, 50 unit apartment building. The building is wood frame on concrete slab, with solar photovoltaic panels on a portion of the roof to provide electricity for the common areas. Unit mix consists of the following:

Unit Type	No. of Units	Unit SF
Studio	11	428
Studio – H/C Adapted	1	428
1 Bedroom	33	528
1 Bedroom – H/C Adapted	4	528
2 Bedroom (Staff unit)	1	700

The units are interior accessed with two interior stairways and an elevator providing service to the upper floors. The units have gas wall furnaces, electric stoves and refrigerators. Project amenities include an entry lobby/sitting area, a community room with full commercial kitchen and patio, a manager's office, Resource Coordinator's office, maintenance workshop/office and separate maintenance garage, laundry room, back patio area, community garden, patio with BBQ, and on-site surface parking. Onsite staff consists of a full time manager, maintenance person and social services coordinator.

6. Total Project Cost: *(Include all costs for this particular project regardless of source.)*

Please see attached budget.

7. Project Budget for CDBG Funds:

Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.

Please see attached budget which shows the proposed use for each source of funds. EAH proposes to use CDBG funds exclusively for costs associated with the rehabilitation of Mackey Terrace. These items include hard construction costs, third-party consultant studies, architectural and engineering design work as necessary, and other soft costs.

Construction	\$200,000
Construction Consultants	\$ 20,000
Architect/Engineer	\$ 20,000
Construction Inspection	\$ 10,000

The cost estimate was derived from the information provided by the Capital Needs Assessment consultant, Jim Fagler of Gelfand Architects, who is a registered architect with many years of experience in both design and cost estimating. It also incorporates actual unit costs from recent rehabilitation projects with similar scopes of work.

The property was built in 1994, after the use of lead based paint was required to be discontinued. However, a risk assessment will be undertaken to confirm that there is no lead-based paint used in or on the building. Should there be evidence of lead-based paint, residents will be provided a lead hazard information pamphlet and a notice describing the assessment and hazard reduction actions that will be implemented. EAH has established company-wide training regarding the hazards of lead-based paint and appropriate maintenance standards as part of regular building operations.

8. **Other Sources of Funds for this Project:** *Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?*

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
Tax-Exempt Bond Loan	Acq/Const	\$8,017,000	Est. 4/2015	No	Est. 7/2015	At closing-est. 9/2015
Tax-Exempt Bond Loan	Permanent	\$4,621,950	Est. 4/2015	No	Est. 7/2015	At closing-est. 9/2015
Seller Take Back Loan	Acq/Perm	\$3,395,990			2/2015	At closing
Tax Credit Equity-LP	Acq/Const/Perm	\$5,475,486	Est. 4/2015	No	Est. 7/2015	At closing
Tax Credit Equity-GP	Acq/Const/Perm	\$500	Est. 4/2015	No	Est. 7/2015	At closing
Net Op. Income	Permanent	\$315,494			Est. 7/2015	At conversion
Accrued Seller Loan Interest	Permanent	\$2,515			Est. 7/2015	At conversion
Seller Reserves	Acq/Perm	\$109,829			Est. 7/2015	At conversion

9. **Project Implementation:**

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

EAH Real Estate Management staff will be responsible for implementing the project. Principal participants in the process of planning, financing, managing and completing construction include Matt Steinle, VP Real Estate Management and Lynn Berard, Senior Project Manager. EAH Real Estate Management will perform income certifications to assure that all residents, current and future, are within the income limits. This staff will also prepare any necessary notices related to the rehabilitation, including, if necessary, lead-based paint notices, as well as any marketing materials needed. They will provide support to Real Estate Management staff in terms of resident needs and issues during construction.

Proposed Project Schedule	
Lender Commitment Letter	May/June 2015
Equity Letter of Intent	May/June 2015
Permit Plan Check Submittal	June 2015
CDLAC Application - Tax Exempt Bonds	July 2015
TCAC Application (4%)	July 2015
HUD Approval of 202 Prepayment	Aug 2015
CDLAC Award - Tax Exempt Bonds	Sept 2015
TCAC Application (4%)	Sept 2015
Permits Ready	Sept 2015
Tax Credit/Bond Closing (Loan and Acquisition)	Oct 2015
Construction Start	Nov 2015

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800
7	109,900
8	117,000

The project will benefit individuals and small families who are 62 or older and who have income that is at or below 60% of the area median income for the household size. The primary population that is currently being served by the property, and which will continue to be served during and after the rehabilitation, are people who are at 50% AMI or less. All units are rent-subsidized under a project-based Section 8 HAP contract from HUD. Prior to transaction closing, HUD will provide a new 20 year Section 8 contract.

It is intended that the units will be financed with a combination of tax-exempt bonds, 4% Low Income Tax Credits, along with the CDBG funds applied for in this application, and possibly HOME funds, which are being applied for, also. The tax credits will incorporate a 55-year affordability term in a recorded Regulatory Agreement. The use of tax-exempt bonds also requires the incorporation of affordability terms in Regulatory Agreement for the term that the bonds are outstanding. In addition, since the prepayment of the existing 202 loan requires HUD's approval, in exchange for such approval, HUD requires the execution of a 20 year Use Agreement that restricts the use of the property to residents that are low and very low income and who are at least 62 years old. The multiple layers of restrictions ensures the ongoing affordability of the property, with the most restrictive requirement being 55 years.

B. Project Rationale: *Why is this project needed? Will it assist an especially needy or underserved group?*

The Marin County Consolidated Plan for 2010-2014 states that there continues to be a serious shortage of affordable housing in the County for seniors, frail elderly, and people with disabilities. The cost of housing in the City of Novato and Marin County in general has increased so dramatically that many people, are unable to afford housing in the area, or are encumbered with high rent burdens (>30% of their income is spent on housing). The Consolidated Plan estimates that there are 1,000 units needed in the County for elderly people and 500 units needed for frail elderly. Addressing housing needs of the elderly who are extremely low and very low income, and frequently severely rent burdened, is a high priority in the Plan. In addition, preservation of existing affordable housing is also a high priority for the County. The Plan states that the County places highest priority on projects that meet the housing needs of extremely low income and very low income individuals and families, including renters in elderly households. The County's strategy is to leverage resources in order to fund acquisition, rehabilitation, new construction and rental assistance.

The City of Novato states in its draft 2015 Housing Element that the 2008-2010 American Community Survey of Novato estimated approximately 6.3% of the Novato senior population lives in poverty, highlighting the need for providing and maintaining affordable housing. In addition, there are an estimated 2,259 persons 65 and older with a disability living in Novato. The Housing Element notes that the provision of rent subsidized homes and appropriate site design and barrier free-design are recognized as necessities for housing in the City. The Housing Element includes implementing policies to maintain and protect existing affordable housing, to strive to ensure that affordable housing will remain affordable over time, to intervene when possible to help preserve such housing, and to provide support to obtain funding commitments from governmental programs and assist in the rehabilitation of housing for extremely low-income households.

Mackey Terrace provides 49 units of much-needed housing affordable to low-, very low-, and extremely low income seniors, including those with disabilities. Under the project's Section 8 contract, 49 units are affordable at or below 50% of the Marin County Area Median Income (AMI). Moreover, the Section 8 contract requires income targeting so that at least 40% of vacant units are rented to households earning no more than 30% AMI. The financing that will be used to rehabilitate the property will require long term (55 years) affordability, with the rents paid by the residents limited by HUD and the Low Income Housing Tax Credit program. The 20 year Section 8 Housing Assistance Payment Contract (with the ability to renew for an additional 20 years) that will come with the new financing limits the amount of rent paid by the residents to 30% of their income.

The project will preserve 49 units of affordable housing in a highly desirable location (one unit is reserved for onsite management staff and is not income restricted). The rehabilitation will make the capital improvements which are necessary to extend the useful life of the project as well as improve living conditions for current and future residents. The upgrading and addition of accessibility and universal design features will greatly enhance the quality of life for residents. The proposed improvements which will reduce energy usage in the units will benefit the residents, also.

C. Equal Opportunity: *For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)*

The vision of EAH Housing and Mackey Terrace is of balanced communities comprised of people of many income levels, educational backgrounds, job skills, religions, and races, with attractive and affordable housing. We believe this balance enhances the quality and richness of all our lives. Mackey Terrace monitors the demographics (resident, applicant, census data) of the market area to track race, ethnicity and persons with disabilities for purposes of determining those least likely to apply for housing. According to Mackey Terrace's AFHMP, the Hispanic or Latino population has been identified as least likely to apply for housing. Several strategies were implemented to make Mackey Terrace more welcoming and comfortable to groups least likely to apply, such as collaborating with Hispanic and Latino-serving community organizations to assist in outreach, contracting with Language Line to provide oral interpretation, providing documents such as leases, house rules, applications and announcements of vacancies or open waiting lists in non-English languages, providing Fair Housing and Section 504 training to all employees and providing beneficial resources and services for residents.

EAH prepares a marketing plan specific to each development. The marketing plan for the subject project details steps needed to comply with affirmative marketing requirements for the development, including such steps as advertising in non-English-language media and notifying public agencies and community groups, particularly those that serve and support people of low income in the targeted groups, of the rental opportunity.

Mackey Terrace will review the AFHMP annually to determine if the population least likely to apply for housing is still the population identified on the AFHMP, whether current advertising sources still exist, whether the advertising and publicity cited in the AFHMP are still the most applicable or whether sources should be changed or expanded. To determine if our marketing strategies are successful in attracting individuals least likely to apply, applications will be reviewed to track race, ethnicity, persons with disabilities and marketing referral sources. Marketing sources that applicants list as a referral source will be deemed "successful" and those marketing sources not listed in two (2) consecutive years, will be deemed "unsuccessful" marketing sources. Mackey Terrace will contact and collaborate with other community service organizations that assist individuals least likely to apply for housing.

If this project involves housing, how will it affirmatively further fair housing?

Please see response above regarding affirmative marketing steps. Mackey Terrace will affirmatively further fair housing by ensuring that staff attend Fair Housing and Section 504 training every two years and AFHMP training annually. Mackey Terrace maintains records of any analysis conducted as well as actions taken to address any identified issues (if applicable). One goal is to meet regularly with community organizations to encourage dialogue regarding fair housing issues within the County.

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people.

The construction contract will comply with applicable regulations, including federal WBE/MBE rules and Section 3 requirements and the contractor's subcontract must include the same requirements for all subcontractors. We will require the contractor to reach out to minority and women owned businesses and businesses owned by low income people during the bidding process. This could include working with trade groups that are dedicated to supporting such businesses and

placing requests for bid notices in non-traditional trade publications and with organizations such as Hispanic Chambers of Commerce and women's professional groups.

We will solicit proposals from engineering and service companies that are women- and minority owned, such as civil engineers and inspectors.

D. Accessibility: *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*

The property has 5 units that were designed for residents with physical disabilities. These units, along with all common areas within the building will be evaluated with the current accessibility codes in mind and improvements made as much as is financially feasible. We plan to make at least 2 additional units either adaptable for accessibility or fully accessible. The laundry room will be renovated to make it fully accessible. Accessible paths of travel will be provided to appropriate accessible parking spaces and the community garden and all patio areas. Proper signage will be installed to indicate accessible paths of travel. Signage within the building, including plaques with unit numbers will be provided that meet accessibility requirements such as height, lettering and braille. Doors will have hardware that is universal/accessible in design. An elevator provides access to the upper two stories of the building, providing those with disabilities with more options.

E. Green Building: *For new construction or rehabilitation, what will you do to incorporate "green building" principles?*

EAH strives to utilize materials and implement programs that incorporate green building and sustainability principles in all its work. For Mackey Terrance, the Capital Needs Assessment prepared to identify the scope of rehabilitation also includes recommendations for improving energy efficiency and reducing energy usage within both the units and the common areas. Materials will be specified by the architect to include, among other things, no VOC paints and stains and no urea formaldehyde in cabinets and glues to minimize toxicity and gas emissions, "green label" flooring that incorporates recycled materials and low VOC emissions, low flow (1.28 gpf) toilets and low flow faucets and showerheads, Energy Star appliances, energy efficient lighting (fluorescent or LED), high efficiency water heaters with on demand recirculating pumps, drought tolerant, native plants and drip irrigation for landscaping. The contractor will be required to recycle a minimum % of unused materials and materials removed as part of the rehab work. The property already has solar photovoltaic panels on the roof that provides almost 100% of the electricity used by the common areas, including the office and laundry room.

We will provide residents with informational packages that will explain the green aspects of the improvements and help them to incorporate the use of "green" materials and conservation attitudes and behaviors into their daily lives.

EAH has developed and implemented "green" maintenance and operations policies and procedures that are incorporated into a Green Manual used by all properties.

- For further information, please call Roy Bateman (473-6698). It's ok to call with any questions at any time.
- The current year's application form must be used.
- Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.
- **Applications sent by fax or e-mail will not be accepted.**
- This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence. If you'd like to download this form as a Microsoft Word document, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.
- Don't forget to fill out the Organization Profile form.

- All County publications are available in alternative formats (Braille, large print, or CD) upon request. Requests for accommodations may be made by calling (415) 473-4381 (Voice), 473-3232 (TDD/TTY), or by e-mail at disabilityaccess@marincounty.org. This form and other County documents are available in alternative formats upon request.

DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

Section 5 - Project Description - Scope of Work

Mackey Terrace Apartments
626 Owens Drive
Novato, California

REHABILITATION ITEMS	COMMENTS / BRIEF DESCRIPTION OF THE PROPOSED REHABILITATION	NUMBER OF UNITS	PERCENTAGE TO REPAIR
SITE			
Drainage	Add site drainage at asphalt areas	1	5%
Fencing	New fence installation	1	0%
Irrigation	Repair/upgrade system	1	5%
Landscaping/Topography	Clear and grub, new planting various locations, incl new entry ramp, pruning	1	20%
Lighting	Upgrade security & parking lot lighting	4	15%
Parking/Roadways	Revise ADA spaces	3	100%
Sidewalks/Pedestrian Areas	Sidewalk accessibility (separate from ped. Entry)	1	20%
Signage	Provide accessible signage throughout	75	100%
Utilities	Clear existing laterals	1	100%
Pedestrian Entry	Remove and replace with Accessible path from street to property	1	100%
Garden	renovate for accessibility	1	100%
STRUCTURE FRAMES AND ENVELOPES			
Doors and Frames	Misc repairs	5	25%
Facades/Siding/Exterior Walls	Replace all existing masonite siding	1 bldg	100%
Foundation/Substructure	No work assumed	1 bldg	0%
Structural repair	Assume existing dryrot	1 bldg	5%
Insulation	Assume water damaged insulation	1	100%
Painting	Exterior	1	100%
Roofing	Remove and replace all sloped asphalt roofing	1 blg	100%
Windows and Frames	Replace all existing windows	1	100%
Replace Trellis at front	Front trellis needs new roof	1	100%
COMMON AREAS			
Community Room	Replace existing flooring	1	100%
Interior corridors/stairs/lobby	Replace existing flooring	1	100%
Laundry Facilities	Flooring, accessibility	1	100%
Management Office	Remodel office, RC office, maint. Room	1	100%
Accessibility compliance	upgrade to current code	1	0%
MECHANICAL / ELECTRICAL / PLUMBING			
Electrical Systems	Misc electrical repairs	1	100%
Electrical at unit	LED lighting at interior	50	100%
Exterior Lighting	Replace existing with new	1	0%
Fire Alarm/Supression	Repair as necessary	3 floors	10%
Arc fault breakers at units	If required by Building Department	50	100%
Elevator	replace or renovate	1	100%
Smoke alarm upgrades	Upgrade as necessary	1	100%
Upgrade for AC system	Upgrade panels if AC system is added	36	100%
HVAC/Heating/Cooling	Replace Wall furnace and portable AC	50	100%
HVAC repairs	Repair existing radiators in units	50	100%
Water Heaters	Replace water heater boilers	3	100%
Solar Thermal	Provide for pre-heat for HVAC Option system		
Comm. Bldg HVAC upgrade	Replace condensing units and fans	1	100%
Fans in unit bathrooms	Replace Unit exhaust fans	50	100%
Low flow shower heads	Replace shower heads with low flow heads	50	100%
Replace unit toilets	Replace with low flow 1.28 or 1.0 gpf	50	100%

Mackey Terrace Apartments
626 Owens Drive
Novato, California

REHABILITATION ITEMS	COMMENTS / BRIEF DESCRIPTION OF THE PROPOSED REHABILITATION	NUMBER OF UNITS	PERCENTAGE TO REPAIR
UNIT INTERIORS			
Stoves	Replace per matrix poor/fair	40	80%
Range Hoods	Replace per matrix, provide new at lower units	50	100%
Refrigerators	Replace per matrix poor/fair	50	100%
Cabinets	Upper/lower per matrix poor/fair	30	25%
Carpeting	Replace poor and fair carpeting per matrix	40	80%
Vinyl	Replace poor and fair carpeting per matrix	40	80%
Ceilings/Walls	Patch gyp board	1	20%
Countertops	Replace pl lam ctops per matrix poor	50	100%
Doors	Entry, closet, bath doors repl. in poor/fair condition	25	50%
Painting	Paint all units, all areas except recent turnover	50	50%
Sinks/Faucets	Replace kit/bath sinks/faucet in poor/fair cond.	50	50%
Tub surrounds	Replace tubs/surrounds of poor or original tile	4	8%
Window Coverings	Replace damaged blinds	50	50%
Bathtubs	Refinish existing tubs	5	10%
Bathroom Accessories	towel & shower curtain bars, toilet paper holder; med cabinets	25	50%

ACCESSIBILITY / ADA COMPLIANCE

Public Area Accessibility	Unit door & common area door hardware	1	100%
Unit Accessibility	Misc repairs to accessible units	4	100%
Unit Accessibility	Create new fully accessible units	4	8%
Provide comm room access	See common area work above	1	0%
Unit upgrade for visual/hearing needs	Add strobes/horns for minimum of 2% of units besides ADA units	1	2%

Mackey Terrace, Novato, California
Sources & Uses - Basis

Funding Uses (Development Budget)

	Adjust Factor	TOTAL
ACQUISITION & LAND COSTS		
Purchase Price of Land		20,000
Purchase Price of Improvements		8,354,931
Extension Fees not in price		0
Title/Recording/Escrow		5,000
Buyer paid Transfer Taxes		9,190
Destructive Testing		5,985
Demolition		0
Acquisition of Seller Reserves		0
Subtotal, Acquisition		8,395,106
GENERAL DEVELOPMENT COSTS		
Building Hard Costs in CNA		2,509,850
Site Improvements in CNA		384,000
Additional Discretionary Improvements		0
General Conditions & Contractor Insurance	8.0%	231,508
Contractor Overhead and Profit	6.0%	187,521
Construction Security		50,000
Insurance	2.0%	65,007
Photovoltaic System		0
GC Contract Contingency	2%	66,308
Hard Cost Estimating Contingency	5.0%	144,693
Const Period Change Order Contingency	12.0%	422,710
Subtotal, Construction Hard Costs		4,061,597
Local Impact Fees		0
Local Permits/Fees		41,055
Utility Installations PG&E_Water		0
Public Improvement Bonds		0
Subtotal, Permits & Fees		41,055
Initial Property Assessments / Diligence		22,260
Architectural & Engineering		166,207
Phase I& II Reports/Toxic		2,500
Civil Engineer		40,300
Geotech Analysis		5,000
Construction Consultants		38,000
Construction Testing and Inspection		25,000
Subtotal, A&E and Consulting		299,267
FINANCING		
Appraisal		28,131
Market Study/Rent Comp Study		8,000
Construction Loan Inspection, DD fees		17,950
Construction Loan Origination and Misc Fees		65,000
Construction Loan Interest		107,597
Interest on Predevelopment Loans		7,324
Interest on Seller Take Back Loan		2,515
TEB Costs of Issuance		129,000
Permanent Loan Fees		84,219
AHP Consultant		0
CDLAC Deposit-refundable (app. fee incl. in Costs of Issuance)		40,000
TCAC App/Monitr/Reserve Fee		40,359
Subtotal, Financing		530,095
Legal - Acquisition		5,000
Legal - Formation and Syndication		30,000
Legal - Construction Closing (Borrower)		30,000
Legal - Construction Closing (Lender)		65,000
Legal - Permanent Closing (Borrower) & Organization		10,500
Legal - Permanent Closing (Lender)		5,000

Title/Recording/Escrow - Construction		30,500
Title/Recording/Escrow - Permanent		9,000
Subtotal, Legal & Title		185,000
Real Estate Taxes & Carrying Costs		28,968
Builder's Risk and Owner Liability Insu		25,000
Subtotal, Tax & Insurance		53,968
Furniture & Equipment		75,000
Temporary Relocation Costs	2000	100,000
Voluntary Move Incentive Payments		0
Marketing/Income Cert for Section 42		20,000
Subtotal: Relocation, Marketing, F&E, Other Soft		195,000
Capitalized Operating Reserves (# months per 'Finance Assumpt')	6	351,193
Capitalized Replacement Reserves		50,000
Capitalized Partnership Reserve	0	0
Subtotal, Capitalized Reserves		401,193
Soft Cost Contingency		100,000
Subtotal, Soft Contingency		102,550
Syndication Financial Consultant		45,000
Audit and Cost Certification		20,000
Subtotal, Syndication Costs		65,000
Repay Seller Take Back Loan		0
Developer Fee		2,012,945
TOTAL DEVELOPMENT COSTS		16,342,776

Construction Sources of Funds:

Source	Amount
Assumed Debt	
None	
New Debt	
Const/Perm Loan (Base Rent Tranche)	4,010,723
Const/Perm Loan (Section 8 Tranche)	611,227
TE Construction Loan - Const-Period-Only Increment	3,384,357
Seller Cash Reserves Loan	109,829
Other	
Property Reserves as Source	0
AHP	0
HOME/CDBG	250,000
0	0
Seller Take Back Loan	5,567,004
Seller Reserves as source to fund Rehabilitation	
General Partner Equity	500
Initial Limited Partner Capital	547,549
Total Construction Sources:	14,481,188
SURPLUS (GAP)	\$0.00

Permanent Sources of Funds:

Source	Amount
New Debt	
None	
Const/Perm Loan (Base Rent Tranche)	4,010,723
Const/Perm Loan (Section 8 Tranche)	611,227
Seller Cash Reserves Loan	109,829
Seller TakeBack Loan	5,567,004
Accrued Seller Take-Back Loan Const Period Interest	2,515
Loan of Seller Cash at Closing at Conversion	0
Other	
AHP	0
HOME/CDBG	250,000
0	0

9:55 AM 12/8/2014

		0
General Partner Equity		500
Deferred Developer Fee		0
LP's Tax Credit Equity		5,475,486
Net Operating Income to Conversion		315,494
Total Permanent Sources:		16,342,776
SURPLUS (GAP)		\$0

MACKEY TERRACE
Budget

Description of Account	Acct No.	Stabilized Budget
		Proposed Stabilized CY 2017
Revenue - 5000		
Rent	5120	898,514
Tenant Assistance Payments	5122	0
Income from Commercial	5124	0
Garage and Parking Spaces	5992	0
Miscellaneous Rent Revenue	5995	0
Total Rent Revenue - Potential at 100% Occupancy	5100T	898,514
Vacancies - 5200		
Apartments	5220	(44,926)
Stores and Commercial	5240	0
Garage and Parking Spaces	5270	0
Concessions	5250	0
Total Vacancies	5200T	(44,926)
Net Rental Revenue (Rent Revenue less Vacancies)	5152N	853,588
Other Revenue - 5900		
Laundry and Vending Revenue	5910	2,815
NSF & Late Charges	5920	0
Damages and Cleaning Fees	5930	0
Forfeited Security Deposits	5940	0
Cable Income	5990	13,863
Other Income	5999	0
Miscellaneous Tenant Charges		0
Total Other Revenue	5900T	16,678
Total Revenue	5000T	870,267
Percentage Change		2.00%

Expenses - 6000		
Administrative Expenses - 6200/6300		
Advertising	6210	424
Renting Expense	6250	0
Office Salaries	6310	1,591
Office Supplies	6311	2,652
Office Rent Free Unit	6312	0
Computer Licensing Fees	6313	4,758
Computer Charges	6314	1,591
Office Equipment Rental/Service Contracts	6315	0
Management Fees	6320	42,012
Managers Salaries	6330	41,729
Manager Rent Free Unit	6331	19,618
Legal Expense	6340	0
Audit Expense	6350	7,373
Bookkeeping/Accounting Service	6351	6,047
Compliance Monitoring Fee	6353	0
Telephone/Answer Service Exp	6360	7,511
Social Service Coordinator	6361	48,194
Social Service Contract	6361	0
Social Service Supplies	6363	1,273
Bad Debts	6370	0
Conventions Meetings	6378	1,316
Misc Admin Expense (Specify)	6390	6,471
Seminars	6391	1,485
Computer Learning Center Instructor	6393	0
Computer Learning Center Program Supplies	6394	0
Transportation	6396	0
Total Administrative Expenses	6263T	194,047

Description of Account	Acct No.	Proposed Stabilized CY 2017
Utilities - 6400		
Fuel	6420	0
Cable	6430	18,141
Electricity Conservation	6440	7,396
Electricity	6450	1,142
Water	6451	13,480
Gas	6452	4,845
Sewer	6453	
Total Utilities Expense	6400T	45,003
Percentage Change		3.00%
Operating and Maintenance Expenses - 6500		
Janitor & Cleaning Supplies	6515	1,305
Exterminator Contract	6519	1,273
Operating/Maintenance Rent Free Unit	6592	0
Garbage/Trash Removal	6525	9,858
Pool Contract	6532	0
Security Payroll	6530	2,546
Grounds Supplies	6536	1,379
Grounds Contract	6537	21,197
Repairs Payroll	6540	51,539
Repairs Materials	6541	6,919
Repairs Contracts	6542	9,929
Elevator Maint./Contract	6545	5,305
HVAC Repairs & Maintenance	6546	0
Decorating Payroll/Contract	6560	2,606
Decorating Supplies	6561	1,591
Vehicle & Maint. Equip. Oper. and Repair	6570	0
Miscellaneous Maintenance Expense	6590	1,591
Total Operating & Maintenance Expenses	6500T	117,037
Taxes & Insurance - 6700		
Real Estate Taxes	6710	28,368
Payroll Taxes (Project's share)	6711	12,350
Misc Taxes & Licenses	6719	1,340
Property and Liability Insurance (Hazard)	6720	12,052
Workmen's Compensation	6722	6,460
Health Insurance & Other Employee Benefits	6723	38,521
D & O Insurance	6729	887
Total Taxes & Insurance	6700T	99,978
Replacement Reserve Annual Deposit	9328	17,500
Total Operating Expenses (with R&R)		473,566
Total Operating Expenses (without R&R)		456,066
Net Operating Income		396,701
Financial Expenses - 6800/9300		
Bond Issuer Fee	6897	4,622
Trustee Fee		5,000
Mortgage Principal and Interest Payment	9321	305,000
Total Financial Expenses	6800T	314,622
Expenses - 6900		
Debt Service Ratio		1.26
Total Cost of Operations Including Prin. & Int.		788,188
Cash Flow (Deficit) (before Capital Improvements)		82,079

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: EAH Inc. (California)/Mackey Terrace

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	74
Low income people	16
People above the low income limits	10

Percentages (%)	Clients Your Organization Serves (CA)	Clients for this Project	Support Staff (Mackey Terrace)	Professional Staff (Mackey Terrace)	Board (Mackey Terrace)	Advisory Committee
Ethnic/Racial Demographics						No Adv. Com.
Asian-American/Pacific Islander	20	15				
African-American/Black	15			50		
Caucasian/White	33	85	75	50	100	
Native American	2					
Mixed Heritage	11		25			
Unknown/other	19					
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						
Of Latino/ Hispanic Origin	22	13	50	25	0	
NOT of Latino/ Hispanic Origin	78	87	50	75	100	
TOTAL %	100%	100%	100%	100%	100%	100%
Age						
0-5 years old	10					
6-17	19					
18-24	17					
25-59	33	4	75	100	50	
60 +	21	96	25		50	
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						
Female	56	75	50	50	75	
Male	44	25	50	50	25	
Total %	100%	100%	100%	100%	100%	100%
Disabled % Not tracked						

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board (California properties only)	10%
On Advisory Committee	N/A

MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16

NH-5

1. **Project Name: New Beginnings Center, Floor** 2. **Total Amount Requested:** \$89,672
3. **Project Sponsor: Homeward Bound of Marin**
Non-housing proposals must specify the amount requested from each planning area.

Contact Person: Paul Fordham

Title: Deputy Director

**Mailing Address: 1385 N. Hamilton Parkway
Novato, CA 94949**

Telephone: (415) 382-3363 Ext. 211

Fax: (415) 382-6010

E-mail: pfordham@hbofm.org

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$
Novato Planning Area	\$
Richardson Bay Planning Area	\$
San Rafael Planning Area	\$
Upper Ross Valley Planning Area	\$
West Marin Planning Area	\$

Website (optional): www.hbofm.org

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. **Project Location: (Precise street address).** For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

Street Address: 1399 N. Hamilton Parkway, Novato, CA 94949
Year Building: 2000
APN: 157-970-01

5. Project Description:

Completed at Hamilton Airfield in 2000, the New Beginnings Center (NBC) is an 80-bed emergency shelter facility aimed at helping homeless adults transition to long-term housing and employment. Residents of NBC have a variety of on-campus vocational and training programs, including Fresh Starts Culinary Academy, Janitorial and Building Maintenance, and Landscaping and Garden Maintenance. While staying at NBC, residents learn to identify job skills and participate in job search workshops, job training programs, apprenticeship opportunities, employment search, and retention goal setting. NBC also provides basic healthcare, around-the-clock counseling, an on-site 12-step program, relapse prevention groups, and other services as necessary to help residents move into and maintain long-term housing.

Homeward Bound has recently resurfaced the worn floors in public areas of NBC, but has not yet done so in private dormitory areas. The concrete floors in the dormitory rooms and rest rooms are in great need of replacement for the following reasons: worn out slippery surface, chipped areas, and expanding concrete seams pose urgent safety, wheelchair access, and sanitation concerns. The funding requested will be used to replace the worn floors in the dormitories and bathrooms with a safe, seam-free, easy-to-sanitize, and durable tile surface. The work will help extend the life of the facility and will help create a positive environment that is conducive to ending homelessness.

6. Total Project Cost: (Include all costs for this particular project regardless of source.)

\$89,672.00 based upon the secured estimate from Grima Tile and Stone for all costs to furnish and install new tile floors.

7. Project Budget for CDBG Funds:

Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.

Item	Cost
1. Furnish and install in dormitory rooms 13" x 13" Emser Bombay Salsette tiles with matching 6" cove base	
2. Furnish and install in restrooms 7" x 7" Bombay Salsette tiles with matching 6" cove base	
Total Cost	\$89,672

8. Other Sources of Funds for this Project: Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
Not applicable. No other funds needed.						

9. Project Implementation:

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

A project team with Paul Fordham, Homeward Bound's Deputy Director, and Paula Jones, Homeward Bound's Maintenance Team Leader, will be responsible for the project. The project team will work closely with and oversee Grima Tile and Stone on the project. The project is ready and will begin as soon as CDBG funding is secured and available.

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800
7	109,900
8	117,000

All of the residents and recipients of services at NBC operated by Homeward Bound of Marin are homeless adults and thereby qualify as low and very low-income individuals. Many have no income source at all when they first approach Homeward Bound for shelter. Each resident's income is documented as part of the application process and is tracked throughout his or her stay. Homeward Bound's Hamilton lease and funders require that the property remain affordable for the long-term.

B. Project Rationale: Why is this project needed? Will it assist an especially needy or underserved group?

The funding requested will be used to replace the damaged floors with a durable tile surface. Replacing the floors in dormitories and restrooms is an urgent priority for the following reasons: (1) **Safety:** The current floors are concrete and their coating is deteriorating and becoming very slippery. Adding new tile with grout lines would greatly reduce the potential for slip-and-fall accidents and injuries among residents, staff, volunteers, and visitors. (2) **Disability Access:** The pronounced seams (concrete expansion joints) in the current floors hamper the operation of wheelchairs. Setting tile would eliminate this problem, and ensure that the facility remains fully wheelchair accessible. (3) **Sanitation:** Tiles are very easy to clean and sanitize which is essential for maintaining a positive environment for living and ending homelessness. NBC provides 80 shelter beds and a range of employment and supportive services for homeless adults. Replacement of damaged flooring is a high priority maintenance item, and will help to ensure that this critical facility will remain safe and available to serve homeless people in the long run.

C. Equal Opportunity: For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)

NBC program participants come from a diverse range of racial and ethnic backgrounds (63% White, 22% Black, 7% Latino, 4% Native American, 2% Hawaiian, 1% Asian, 1% Multi-racial) and are members of one or more protected classes, such as, non-English speaking persons, and persons with disabilities (80% of NBC guests are disabled). Homeward Bound has an Equal Opportunity and Non-Discrimination Policy, which promotes equality of opportunity and establishes a protocol to address complaints of discrimination and provide for reasonable accommodations. Demographic groups least likely to apply for this shelter are non-English speaking persons. As this program is targeted for persons who are homeless, affirmative marketing is through word of mouth and through close collaboration with local providers. Steps to reach non-English speakers will include direct outreach to qualified adults in this demographic group to encourage them to apply for Homeward Bound shelter and services; translating shelter and service information into Spanish and Vietnamese; providing bilingual services or translation where needed, making available written information regarding shelter policies and services (e.g., Fair Housing of Marin).

If this project involves housing, how will it affirmatively further fair housing?

Homeward Bound affirmatively furthers fair housing by having in place an Equal Opportunity and Non-discrimination policy which establishes proactively the commitment of Homeward Bound to provide equality of opportunity and to not discriminate in its policies and practices. Homeward Bound also has a policy for Reasonable Accommodation and a Section 504 Coordinator to ensure compliance and track reasonable accommodation requests. Homeward Bound also posts all Equal Opportunity policies on site and has an established compliant policy to address any concerns related to discrimination. Homeward Bound will also establish an affirmative marketing campaign to evaluate access to its programs and to continue to take proactive steps to reach those groups least likely to apply to the program.

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people.

N/A

D. Accessibility: What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?

Homeward Bound has a Reasonable Accommodation policy to ensure persons with physical or other disabilities can equally enjoy the benefits of the program. Homeward Bound also has a Section 504 coordinator to support compliance with requests. NBC has reviewed its physical accessibility and information can be found in its Self Evaluation plan which address physical accessibility and program policies. NBC facilities meet ADA specifications for wheelchair accessibility, provides for TDD/relay service for hearing impaired and has raised tactile signage for persons with sight impairment. Other reasonable modifications can be made upon request.

E. Green Building: For new construction or rehabilitation, what will you do to incorporate "green building" principles?

Green building principles incorporated include: (1) Extended life cycle: the durable new tile floor will last significantly longer than other materials, thereby preserving resources and reducing waste; and (2) Easily maintained: this surface can be easily cleaned without use of toxic chemicals.

- o For further information, please call Roy Bateman (473-6698). It's ok to call with any questions at any time.
- o The current year's application form must be used.
- o Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.
- o **Applications sent by fax or e-mail will not be accepted.**
- o This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence. If you'd like to download this form as a Microsoft Word document, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.
- o Don't forget to fill out the Organization Profile form.
- o All County publications are available in alternative formats (Braille, large print, or CD) upon request. Requests for accommodations may be made by calling (415) 473-4381 (Voice), 473-3232 (TDD/TTY), or by e-mail at disabilityaccess@marincounty.org. This form and other County documents are available in alternative formats upon request.

DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.



GRIMA TILE & STONE

CA License 826537

1325 Airport Road Cotati, CA 94931

Office Phone 707-792-1889 Fax 415-962-4151

Tile & Stone Proposal Exhibit A

Date 12-10-13

TO : Paula
Homeward Bound

Project : Phase 2 Dormitory Tile

Dormitory Flooring	\$89,672
Furnish and install new tile floors. Tile to be 13x13 Emser Bombay Salsette at all floors except restrooms. Restrooms to be 7x7 Bombay Salsette with matching 6 inch cove base. Tile to be installed over Tec Primer and grouted with Laticrete Permacolor grout. Grout to be sealed upon completion with Miracle 511.	
Total	\$89,672

Qualifications:

All tile to be set straight with a 3/16 inch grout joint.

Removal of existing base, doors, toilets and partitions shall be the responsibility of the buildings owner.

All work to be done during normal business hours

Terms:

All tile to be approved by owner and paid for upon delivery to jobsite.

Any contract issued pursuant to this proposal must list this proposal as an exhibit.

Proposal based on Tile setter & finisher wage rates per the Federal Davis -Bacon Act

X _____ Date _____
Proposal Acceptance

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: Homeward Bound of Marin

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	100%
Low income people	0%
People above the low income limits	0%

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
Ethnic/Racial Demographics						N/A
Asian-American/Pacific Islander	3%	9%	0%	0%	0%	
African-American/Black	21%	24%	36%	5%	15%	
Caucasian/White	56%	43%	57%	76%	77%	
Native American	2%	0%	0%	0%	0%	
Mixed Heritage	18%	24%	7%	19%	8%	
Unknown/other	0%	0%	0%	0%	0%	
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						N/A
Of Latino/ Hispanic Origin	17%	23%	8%	18%	8%	
NOT of Latino/ Hispanic Origin	83%	77%	92%	82%	92%	
TOTAL %	100%	100%	100%	100%	100%	100%
Age						N/A
0-5 years old	10%	38%	0%	0%	0%	
6-17	4%	17%	0%	0%	0%	
18-24	4%	5%	3%	0%	0%	
25-59	68%	40%	82%	71%	77%	
60 +	14%	0%	15%	29%	23%	
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						N/A
Female	37%	58%	51%	59%	69%	
Male	63%	42%	49%	41%	31%	
Total %	100%	100%	100%	100%	100%	100%
Disabled %	42%	16%	0%	0%	8%	N/A

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	8%
On Advisory Committee	N/A

Organization Profile - 2015-16 Data Collection Pilot

Income Limits

Household Size	Very Low Income Limit (≈50% of Median Income)	Low Income Limit (≈80% of Median Income)
1	38,750	62,050
2	44,300	70,900
3	49,850	79,750
4	55,350	88,600
5	59,800	95,700
6	64,250	102,800

MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16

NH-6

1. **Project Name: Oma Village:
Housing for Working Families**

2. **Total Amount Requested: \$50,000**

Non-housing proposals must
specify the amount requested
from each planning area.

3. **Project Sponsor: Homeward Bound of Marin**

Contact Person: Paul Fordham

Title: Deputy Director

**Mailing Address: 1385 N. Hamilton Parkway
Novato, CA 94949**

Telephone: (415) 382-3363 Ext. 211

Fax: (415) 382-6010

E-mail: pfordham@hbofm.org

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$
Novato Planning Area	\$
Richardson Bay Planning Area	\$
San Rafael Planning Area	\$
Upper Ross Valley Planning Area	\$
West Marin Planning Area	\$

Website (optional): www.hbofm.org

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. **Project Location: (Precise street address).** For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

Street Address: 5394 Nave Drive, Novato, CA 94949

APN: 155-020-46

Year Built: N/A because the project involves new construction. The building date of earlier buildings that have been demolished is uncertain because the Novato Planning Department misplaced the records according to the appraisal.

5. **Project Description:**

Homeward Bound of Marin is very pleased to request additional funding for costs relating to development of the Oma Village - Housing for Working Families project. Oma Village is a critically needed permanent supportive housing project for homeless families in Marin County. When complete, this project will transform what used to be a disparate collection of run-down buildings formerly housing an alcohol and drug rehabilitation program into a thriving, eco-friendly community of 14 compact one- and two-bedroom family homes. Groundbreaking occurred in July 2014. When completed in December 2015, for a total cost of \$4.93 million, the new homes will house low-income families who are all working their way out of homelessness through employment, job training, and/or education. At full capacity, the site will house approximately 35 parents and children, depending upon the size of families. The project will not only provide sorely needed stable homes for families from Homeward Bound's emergency and transitional housing programs; it will also help address the high community priorities of ending homelessness and providing needed workforce housing in Marin.

6. Total Project Cost: (Include all costs for this particular project regardless of source.)

\$4,935,266 is the estimated total project cost. This includes \$1,088,820 for the site acquisition phase (already complete) and \$3,846,446 for the development phase, which includes construction, predevelopment/project planning, and finance fees and costs.

7. Project Budget for CDBG Funds:

Budget must include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.

The \$50,000 requested will be used only for allowable costs, relating to allowable site demolition, project design, and projected-related pre-development, and off-site improvements. Please see the detailed cost estimate attached for details.

8. Other Sources of Funds for this Project: Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?

Source	Use	Amount	Date You Applied	*Are Funds Committed?	Date Funds Were Committed	When Available
Dominican Sisters	Acquisition	\$100,000	Fall 2011	Yes	Fall 2011	Now
MCF	Acquisition	\$300,000	Fall 2011	Yes	Spring 2012	Now
Marin County	Acquisition	\$250,000	Fall 2011	Yes	Spring 2012	Now
Private Donors	Acquisition	\$103,115	Fall 2011	Yes	Fall 2011	Now
MCF Loan	Acquisition	\$200,000	Fall 2011	Yes	Spring 2012	Now
Novato CDBG	Development	\$78,000	Wint. 2011	Yes	Spring 2012	Now
County CDBG	Development	\$31,879	Wint. 2011	Yes	Spring 2012	Now
County HOME	Development	\$530,538	Wint. 2011	Yes	Spring 2012	Now
Novato CDBG	Development	\$155,000	Wint. 2012	Yes	Spring 2013	Now
Novato CDBG	Development	\$22,850	Fall 2013	Yes	2014	Now
County HOME	Development	\$416,542	Fall 2013	Yes	2014	Now
HOME	Development	\$510,759	Fall 2014	No	Pending	Pending
Novato Housing	Development	\$400,000	Spr. 2012	Yes	Fall 2012	Now
Marin County	Development	\$300,000	2012	Yes	2012	Now
MWH Trust	Development	\$410,000	Fall 2013	Yes	2014	Now
Bank of Marin	Development	\$25,000	2012	Yes	2012	Now
1 st Republic Bank	Development	\$10,000	2012	Yes	2012	Now
MCF	Development	\$600,000	Fall 2012	Yes	Fall 2012	Now
Tam. Pacific	Development	\$200,000	2013	Yes	2013	Now
C. Porter Hale Fdn.	Development	\$100,000	2013	Yes	2013	Now
Peter Haas Fdn.	Development	\$100,000	2013	Yes	2013	Now
Pell Fdn.	Development	\$25,000	2013	Yes	2013	Now
Raab Fdn.	Development	\$2,000	2013	Yes	2013	Now
Corp/Priv Donors	Development	\$337,698	2013-14	Yes	2013-14	Now
HomeAid N. CA	Development	\$397,832	2014	Yes	2014	Now

*Note: All funding commitments are firm.

9. Project Implementation:

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

Homeward Bound is the owner and developer of the Oma Village project. The agency has demonstrated its capacity for these roles by having successfully self-developed the New Beginnings Center and Next Key Center. Deputy Director Paul Fordham oversees the project, interfacing with all the key players, including Novato planning officials. In addition, Doug Elliott, a principle at Pacific Rim Partners, has been retained to act as the project manager/fee developer for the project. In this capacity, Mr. Elliott is coordinating key aspects of project development, including the design, permitting, and construction and construction processes. Mr. Elliott, a Marin resident, has been a builder and project developer for 35 years, and previously assisted Homeward Bound in the development of the New Beginnings and Next Key Centers.

The project has two phases: property acquisition and housing development as follows:

Phase 1: Property Acquisition, Completed in 2012:

Homeward Bound has raised the needed funds for and acquired the 5394 Nave Drive property.

Phase 2: Housing Development, 2012 – January 2016:

The housing development phase is now well underway. The dilapidated buildings that formerly occupied the site were demolished in March 2013, and the site cleared. Fundraising is moving forward (see above) with \$4.5 million secured to date. The City of Novato approval process has been completed and a ceremonial groundbreaking held in July 2014.

Responding to neighbors' input gathered over the course of three public work shops, the design was changed from one- to

two-story homes, which impacted the cost effectiveness of the project's original Blu Home design. As a result, the Kevin Stephens Design Group has been retained for architectural services, and a lower cost design was prepared. CSW Stuber-Stroeh has worked on the civil engineering side and SWA on landscaping design. Messrs. Fordham and Elliott are working with closely with the above professionals and other sub-contractors to complete the pre-development process and prepare for housing construction, expected to last 12 months, from January 2015 to December 2015.

The project plan for the ¾ acre site that encompasses a village of 14 two-story homes, a community center, communal open space, and parking. All told, the site will house approximately 35 parents and children, depending upon the sizes of the families. The community center will include a meeting space, a computer learning and tutoring center, and laundry facilities. The communal spaces separating buildings will encourage children's play and family social interaction, and there will be nine parking spaces, as well as on-street parking (only 35% of the families have cars). A sound wall will limit noise from nearby Highway 101.

The project is on track for completion in December 2015 and a Grand Opening in January 2016. The timeline is:

- August 2012 – Selected original architect, project manager/fee Developer, contractor
- August 2012 – Conducted environmental review, formed capital campaign committee
- March 2013 – Demolished pre-existing dilapidated structures on the site
- August 2013 – Secured city approvals (design, re-zoning of site, environmental, etc.)
- December 2013 – Completed value engineered drawings
- March 2014 – Obtained building permit
- July 2014 – Held ceremonial groundbreaking
- September 2014 – Secured city approval of project management plan
- January 2015 – Start construction
- December 2015 – Complete construction
- January 2016 – Obtain Certificate of Occupancy and hold Grand Opening

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800
7	109,900
8	117,000

This housing is a continuum of Homeward Bound's programs and thus will serve homeless families who are leaving or graduating from Homeward Bound-operated emergency shelters or transitional housing programs, such as the Family Emergency Center and Family Resource Center. In recent years, Homeward Bound has served an average of 120 homeless families per year, so there should be no shortage of families in need of the homes. Most of the families served will fall within the extremely low-income range (30% or less of AMI) with the remainder within in the low-income range (50% or less of AMI). Families selected for these homes will come from the group of homeless families whose adults are actively engaged in employment or job training, job placement, and/or career-related education. These will encompass families who are striving to improve economically and become fully self-sufficient. Thus, in addition to job training and placement assistance all the families will have access to Homeward Bound asset-building and income support programs, including financial literacy and savings programs, tax benefit assistance, and public benefits counseling. For such upwardly mobile families, a home of their own will be a critical step forward that will help to catalyze their family and personal successes. Each resident's income will be documented as part of the application process and will be tracked throughout his or her stay. Homeward Bound intends to maintain long-term project affordability and will provide any affordability restrictions requested by project funders.

B. Project Rationale: Why is this project needed? Will it assist an especially needy or underserved group?

This project is needed to help meet very high priority community goals relating to ending homelessness, increasing the overall supply of affordable housing, and increasing the supply of workforce housing. In addition, the project will promote a smart growth approach to development because it is close to a number of Golden Gate Transit bus lines; it is positioned within an existing mixed area needing redevelopment; and it will incorporate green design. All of the above priorities are highlighted in key Marin County planning documents, as follows:

- County of Marin 2010-2014 Consolidated Plan, prioritizes increasing the supply of affordable housing for low income, homeless, and workforce households.
- Marin Community Foundation 2010-2014 Strategic Plan, prioritizes increasing the supply of affordable housing, including for homeless persons, and ending the cycle of poverty for low-wage workers and other low-income persons.
- County of Marin Homeless Continuum of Care Plan (submitted to HUD), prioritizes ending homelessness by providing more permanent affordable and supportive housing and reducing the number of homeless households with children

- Marin County's Ten Year Homeless Plan, prioritizes all efforts to end homelessness and provide permanent affordable and supportive housing for low-income and homeless households.
- Novato Housing Element, prioritizes increasing the supply of affordable housing, including for homeless households and the workforce.

C. Equal Opportunity: *For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)*

Most of the families served by this project will be members of one or more protected classes, such as minority families, single parent-headed families, and non-English speaking families, under County of Marin's Analysis of Impediments to Fair Housing Choice Implementation Plan, thus forwarding fair housing in Marin. Homeward Bound has an Equal Opportunity and Non-Discrimination Policy, which promotes equality of opportunity and establishes a protocol to address complaints of discrimination and provide for reasonable accommodations. Demographic groups least likely to apply for this shelter are non-English speaking persons. As this program is targeted for persons who are homeless, affirmative marketing is through word of mouth and through close collaboration with local providers. Steps to reach non-English speakers will include direct outreach to qualified families in this demographic group to encourage them to apply for Homeward Bound housing; translating housing and service information into Spanish and Vietnamese; providing bilingual services or translation where needed, making available written information regarding housing policies and services.

If this project involves housing, how will it affirmatively further fair housing?

Homeward Bound affirmatively furthers fair housing by having in place an Equal Opportunity and Non-discrimination policy which establishes proactively the commitment of Homeward Bound to provide equality of opportunity and to not discriminate in its policies and practices. Homeward Bound also has a policy for Reasonable Accommodation and a Section 504 Coordinator to ensure compliance and track reasonable accommodation requests. Homeward Bound also posts all Equal Opportunity policies on site and has an established compliant policy to address any concerns related to discrimination. Homeward Bound will also establish an affirmative marketing campaign to evaluate access to its programs and to continue to take proactive steps to reach those groups least likely to apply to the program.

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people.

Homeward Bound is committed both to recruiting women- and minority-owned development partners and to providing employment opportunities to low-income persons and businesses. The existing development partners are all committed to equal opportunity in hiring and sub-contracting practices. For example, the architects, Kevin Stephens Design Group, have a staff composed of a majority of both women and minorities. At Homeward Bound's request, Mr. Elliot is explicitly advertising for and encouraging qualified local Marin women- and minority-owned firms to bid on all future design and development work. Finally, when Oma Village is operational Homeward Bound residents will receive paid positions in on-site janitorial and maintenance operations, as they do in other Homeward Bound sites.

D. Accessibility: *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*

Homeward Bound is committed to equal access to all of its programs for people with physical and other disabilities (who are disproportionately represented in the homeless population). Homeward Bound has a Reasonable Accommodation policy to ensure persons with physical or other disabilities can equally enjoy the benefits of the program. Homeward Bound also has a Section 504 coordinator to support compliance with requests. The project will be designed and built in accordance with applicable ADA disability access guidelines, including fully accessible ground floor units and common areas.

E. Green Building: *For new construction or rehabilitation, what will you do to incorporate "green building" principles?*

These small eco-friendly homes will be environmentally conscious in a variety of ways. Inspired by the innovative designs of Blu Homes, they will be designed for maximum energy efficiency and have zero emissions from paint and other toxic materials. The use of high performance materials and systems – for example Energy Star appliances and sustainably forested or reclaimed wood and recycled steel – will help to save resources and energy and to reduce construction waste and landfill use. Drought tolerant or native plant landscaping will be utilized to create water savings and reduce garden maintenance costs. Homeward Bound hopes to incorporate solar electricity and solar hot water heating into the project design, and our goal is to have Oma Village certified as Net Zero Buildings.

- For further information, please call Roy Bateman (473-6698). It's ok to call with any questions at any time.
- The current year's application form must be used.
- Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.
- **Applications sent by fax or e-mail will not be accepted.**
- This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence.

If you'd like to download this form as a Microsoft Word document, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.

- Don't forget to fill out the Organization Profile form.

- All County publications are available in alternative formats (Braille, large print, or CD) upon request. Requests for accommodations may be made by calling (415) 473-4381 (Voice), 473-3232 (TDD/TTY), or by e-mail at disabilityaccess@marincounty.org. This form and other County documents are available in alternative formats upon request.

DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

OMA VILLAGE MASTER BUDGET

ADDRESS : 5394 NAVE DRIVE, NOVATO

DESCRIPTION: 12-2 bdrm units, 2- 1 bdrm units, Community Building

PREPARED BY: ELLIOTT ASSOCIATES

UPDATED: December 3rd, 2014

HARD COSTS - See attached cost detail tab

SITE WORK	951,700	
VERTICAL CONSTRUCTION	1,622,630	
DECKS, STAIRCASES, RAMPS & AWNINGS	276,061	
SAVINGS FROM HOMEAID NORTHERN CALIFORNIA	(397,832)	
TOTAL CONSTRUCTION COSTS		2,452,559

SOFT COSTS

BLU HOMES CONSULTING ENGINEERS	118,566	
ARCHITECTURE, PROJECT OVERSIGHT & INSURANCE	415,397	
ENGINEERING & ENERGY & OTHER CONSULTANTS	169,818	
AGENCY & CITY FEES	690,106	
TOTAL SOFT COSTS		1,393,887

LAND, DEMOLITION & OTHER COSTS **1,088,820**

TOTAL PROJECT COSTS 4,935,266

**OMA VILLAGE CONSTRUCTION BUDGET
 A HOME AID NORTHERN CALIFORNIA SPONSORED PROJECT
 RICHMOND AMERICAN HOMES & THE NEW HOME COMPANY, JOB CO-CAPTAINS**

UPDATED: December 3rd, 2014

TOTAL SQUARE FOOTAGE - Including Community Building

15,345

SITE WORK & LANDSCAPING

OFF SITE WORK

65,300

ON SITE WORK- Grading, drainage, underground utilities

652,500

LANDSCAPING-Planting, irrigation & exterior lighting

115,200

FLAT WORK

65,500

SOUND WALLS

53,200

TOTAL SITE WORK

951,700

PROJECT COSTS

**HOME-AID
DONATION**

BID/BUDGET

VERTICAL CONSTRUCTION

FOUNDATION

158,105

FRAMING

383,625

TERMITE TREATMENT

3,100

WINDOWS

57,544

ROOFING

49,460

SOLAR

63,200

HVAC

146,500

PLUMBING

69,053

ELECTRICAL

38,363

ELECTRICAL FIXTURES

9,150

FIRE SPRINKLERS

23,018

INSULATION

40,664

DRYWALL

91,600

PAINTING

35,600

TRIM & DOORS

30,690

TUB & SHOWER ENCLOSURES

20,160

(14,650)

(17,263)

(38,363)

(3,850)

(11,509)

(17,800)

(30,690)

(10,080)

(38,363)

CABINETS	57,544	(57,544)
APPLIANCES	37,700	(37,700)
COUNTER TOPS	86,500	(86,500)
SURROUNDS BATHS & VANITIES	22,447	(22,447)
MIRRORS & SHOWER	16,100	
FLOORING	83,558	(11,074)
SPECIAL INSPECTIONS	13,950	
GENERAL REQUIREMENTS	85,000	
	1,622,630	(397,832)
TOTAL VERTICAL CONSTRUCTION		

EXTERIOR SITE IMPROVEMENTS

Exterior Decks, Staircases, Ramps, Railings & Site Features
Awnings & Carport Roofs

205,500	
70,561	276,061

TOTAL DECKS, STAIRCASES, RAMPS & AWNINGS

TOTAL CONSTRUCTION COST 2,850,391

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: Homeward Bound of Marin

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	100%
Low income people	0%
People above the low income limits	0%

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
Ethnic/Racial Demographics						N/A
Asian-American/Pacific Islander	3%	9%	0%	0%	0%	
African-American/Black	21%	24%	36%	5%	15%	
Caucasian/White	56%	43%	57%	76%	77%	
Native American	2%	0%	0%	0%	0%	
Mixed Heritage	18%	24%	7%	19%	8%	
Unknown/other	0%	0%	0%	0%	0%	
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						N/A
Of Latino/ Hispanic Origin	17%	23%	8%	18%	8%	
NOT of Latino/ Hispanic Origin	83%	77%	92%	82%	92%	
TOTAL %	100%	100%	100%	100%	100%	100%
Age						N/A
0-5 years old	10%	38%	0%	0%	0%	
6-17	4%	17%	0%	0%	0%	
18-24	4%	5%	3%	0%	0%	
25-59	68%	40%	82%	71%	77%	
60 +	14%	0%	15%	29%	23%	
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						N/A
Female	37%	58%	51%	59%	69%	
Male	63%	42%	49%	41%	31%	
Total %	100%	100%	100%	100%	100%	100%
Disabled %						N/A

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	8%
On Advisory Committee	N/A

Organization Profile – 2015-16 Data Collection Pilot

Income Limits

Household Size	Very Low Income Limit (≈50% of Median Income)	Low Income Limit (≈80% of Median Income)
1	38,750	62,050
2	44,300	70,900
3	49,850	79,750
4	55,350	88,600
5	59,800	95,700
6	64,250	102,800

MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16

NH-7

1. Project Name: **Novato**
Residential Rehabilitation Loan Program

2. Total Amount Requested: \$ **530,000**

3. Project Sponsor: *Housing Authority of the County of Marin*

Non-housing proposals must specify the amount requested from each planning area.

Contact Person: *Carmen Hall Soruco*

Title: *Homeownership Programs Manager*

Mailing Address: *4020 Civic Center Drive
San Rafael, CA 94903*

Telephone: *(415) 491-2532* Ext.

Fax: *(415) 472-2186*

E-mail: *csoruco@marinhousing.org*

Website (optional): *www.marinhousing.org*

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$ 45,000
<i>Novato Planning Area</i>	\$ 90,000
Richardson Bay Planning Area	\$ 55,000
San Rafael Planning Area	\$ 140,000
Upper Ross Valley Planning Area	\$ 35,000
West Marin Planning Area	\$ 15,000
Countywide Housing	\$ 150,000

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. Project Location: (**Precise street address**). For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

The Residential Rehabilitation Loan Program provides home repair and property improvement loans throughout Marin County to low-income owner occupants of single family homes, floating homes docked in approved berths, mobile homes located within mobile home parks and non-profit-sponsored group homes serving special populations.

5. Project Description:

The Rehabilitation Loan Program underwrites and funds low-interest home repair loans of up to \$35,000 to very low income homeowners who reside in their homes, and non-profit group home sponsors, to undertake and complete necessary home repairs, correct substandard housing conditions and eliminate health and safety hazards.

Types of repairs and improvements that may be undertaken include the repair or upgrading of existing plumbing, heating and electrical systems, roof repair or replacement, correction of foundation, drainage, dry rot and termite-related problems, emergency and/or storm-related repairs, energy and water conservation measures such as window replacement, and ADA improvements for wheelchair accessibility such as ramps and roll-in showers.

Borrowers receive technical assistance from staff in determining the scope of needed repairs, consultation with local building departments, development of cost estimates, obtaining of bids and contracting for the repairs, monitoring and inspecting the work under construction and issuing progress payments for labor and materials. The specific repayment terms of each loan are tailored to fit the homeowner's individual financial circumstances and can be deferred payment loans, due upon sale of the property.

Over the past 39 years, the Residential Rehabilitation Loan Program has processed 1426 applications and funded 716 loans totaling \$12,991,693 as well as 75 further advances on existing loans totaling \$535,078. In Novato, 127 loans, including many for mobile homes, have been funded for a total of \$2,437,321.

6. Total Project Cost: (Include all costs for this particular project regardless of source.)

Total CDBG funds requested are \$530,000. Of this amount \$150,000 is requested from the Countywide Housing allocation for loans to be made available throughout the County, and a combined total of \$380,000 (including \$90,000 for Novato) requested from individual Planning Areas for additional loans to be made within each Planning Area.

7. Project Budget for CDBG Funds:

Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.

Individual rehabilitation loans range from \$5,000 to a maximum of \$35,000. The funds requested will provide loan funds for approximately 21 new loans at an average loan amount of \$25,000. Administrative costs to run the program average \$22,000 per month.

8. Other Sources of Funds for this Project: Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
Marin Comm. Fdn.	Gates Coop	\$1,303K	1996	Yes	1996	1996

9. Project Implementation:

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

Marin Housing Authority administers the Residential Rehabilitation Loan Program and is responsible for its implementation throughout the county. Program staff includes the Homeownership Programs Manager, the Homeownership Programs Specialist, and the Homeownership Programs Services Coordinator, all at half-time, with support provided by General Services and Accounting staff. The program has been operating successfully for many years and is continually evolving to adapt to current situations, building codes, etc.

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800

Since 2001, the program has specifically benefited very low-income homeowners and non-profit-sponsored group homes serving very low income special populations. Every household assisted through the program has income well below 80% of median with the majority (90%) below 50% of median. The average household income is 35% of median. Eligibility is documented in a personal interview conducted with each applicant in which original tax returns, pay stubs, assistance payments and all other sources of income are reviewed and copied to the file. All loan applications are then presented for approval by the Rehab Loan Committee.

The program ensures long term affordability in two ways: 1) by providing low-cost financing that enables a low-income homeowner to repair and maintain his/her home in order to continue to reside in it; and 2) by providing the option of deferred principal and interest repayment, thereby allowing the borrower to avoid unaffordable loan payments. Staff works closely with other social service agencies in identifying and assisting clients who include:

Elderly and Disabled: The program assists elderly and disabled homeowners on fixed (often minimal) incomes to repair unsafe conditions in their home, catch up on critical deferred maintenance, and install accessibility improvements, so that they may "age in place". In many cases the ability to install building accommodations makes the critical difference in enabling a homeowner to remain in his/her own home.

Female Head of Household: Families with only one head of household often face an insurmountable financial obstacle when faced with urgently needed home repairs. In some cases having to sell and relocate out of the County may be the only alternative.

Special Populations: The program is available to non-profit-sponsored group homes serving special populations such as the developmentally disabled and mentally ill, most of whom only receive SSI

B. Project Rationale: Why is this project needed? Will it assist an especially needy or underserved group?

With the ever-rising cost of real estate in Marin County, one of the highest-priced areas in the country, and the diminishing amount of affordable housing, the Rehab Loan Program is the only way for low-income homeowners, often elderly citizens on fixed incomes who purchased their homes many years ago, to maintain their property in a safe and livable condition so they can remain in their homes and age in place.

Most low-income homeowners are unable to qualify for conventional property improvement loans and cannot perform the maintenance required to preserve their homes in good condition. In addition, many lenders do not lend on mobile homes and floating homes. The Rehab Loan Program is the only recourse for all of these owners when faced with home repair emergencies. It can also be used to install accessibility improvements and energy efficiency measures to lower energy costs which can be prohibitive for low-income homeowners.

C. Equal Opportunity: For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)

Racial and ethnic minorities are underrepresented in the Rehab Loan Program which reflects their overall underrepresentation as homeowners in Marin County. Low-income homeowners who are able to purchase property do so predominantly in the areas where real estate prices are the lowest, namely the Canal Area in San Rafael and Marin City. In order to reach this demographic group, a search of homeowners in these census tracts was conducted through Old Republic Title Company which yielded over 900 names. We have begun mailing out Rehab Loan information to these individual owners spread out over several months.

Program applications and brochures are available in Spanish and Vietnamese as well as English and are disseminated through senior centers, community centers, Hispanic agencies, social service agencies, lawyers for the elderly, senior resource directories, mobile home and floating home site management offices, public libraries and workshops. Interpreters are also available on MHA staff.

If this project involves housing, how will it affirmatively further fair housing?

By serving low-income households who are underrepresented as homeowners in this high-priced real estate market of Marin County, the Program furthers fair housing by providing the means for them to remain in their homes. This means that the majority of borrowers are elderly who were able to buy their homes years ago when they were not low-income but who are now living on fixed low incomes.

For current low-income prospective buyers it is next to impossible to buy into this market unless it is by purchasing a Below-Market-Rate housing unit and tapping into the mortgage assistance programs available through MHA. In order to reach this demographic of younger low-income households, the income guidelines for the Rehab Loan Program were expanded from very-low (50% AMI) to low (80% AMI) for BMR owners and a fully amortized repayment plan required. Several such Rehab Loans have been made to BMR owners to cover the cost of special assessments for exterior repairs as well as other necessary home repairs and upgrades.

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people.

A list of contractors who have worked successfully on past rehab loan projects is maintained by staff and continually updated. RFPs have been sent out in the past to attract women and minority construction companies to add to the list which is handed out borrowers upon request. We recommend that they solicit three bids before signing a contract. The final choice of contractor, however, is up to the homeowner. For small non-technical projects under \$500, homeowners may use unlicensed low-income laborers.

- D. Accessibility: *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*

Accessibility to the Rehab Loan Program for applicants with physical disabilities is ensured by meeting on-site in the clients' homes to complete the application and make a physical inspection of the property. We are also able to have our own traveling notary accompany us to notarize loan documents after a loan is approved. Our office building is also fully ADA compliant if and when clients wish to make office visits.

Most importantly, the Rehab Loan Program is ideal for installing accessibility improvements for clients who require them such as grab bars, ramps, electric stair lifts, handicapped showers, door widening and kitchen modifications. Even elevators have been installed when feasible and cost-effective.

- E. Green Building: *For new construction or rehabilitation, what will you do to incorporate "green building" principles?*

Whenever and wherever feasible, "green building" principles will be applied and implemented to assure the highest possible energy efficiency of the dwelling and the use of methods and materials least disruptive to the environment. Typical improvements include installation of high-efficiency windows and appliances, insulation in walls, ceilings and floors, low-flow toilets and shower heads, and weather-stripping.

- For further information, please call Roy Bateman (473-6698). It's ok to call with any questions at any time.
- The current year's application form must be used.
- Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.

Applications sent by fax or e-mail will not be accepted.

- This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence. If you'd like to download this form as a Microsoft Word document, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.
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DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: HOUSING AUTHORITY OF THE COUNTY OF MARIN

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	98%
Low income people	2%
People above the low income limits	(Only in the BMR Program which is NOT included in this report)

Percentages (%)	Clients Your Organization Serves (4800)	Clients for this Project (316) Rehab	Support Staff	Professional Staff	Board	Advisory Committee
Ethnic/Racial Demographics						
Asian-American/Pacific Islander	12%		7%	20%		
African-American/Black	23%	7%	18%	13%	14%	61%
Caucasian/White	59%	93%	75%	67%	86%	39%
Native American	1%					
Mixed Heritage	1%					
Unknown/other	4%					
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						
Of Latino/ Hispanic Origin	20%	6%	1%	13%		5%
NOT of Latino/ Hispanic Origin	80%	94%	99%	87%	100%	95%
TOTAL %	100%	100%	100%	100%	100%	100%
Age						
0-5 years old	5%					
6-17	19%					
18-24	11%					
25-59	40%	36%	89%	80%	71%	39%
60 +	25%	64%	11%	20%	29%	61%
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						
Female	64%	72%	79%	73%	57%	61%
Male	36%	28%	21%	27%	43%	39%
Total %	100%	100%	100%	100%	100%	100%
Disabled %	30%	28%	0%	0%	0%	10%

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	30%
On Advisory Committee	85%

Organization Profile – 2015-16 Data Collection Pilot

Income Limits

Household Size	Very Low Income Limit (≈50% of Median Income)	Low Income Limit (≈80% of Median Income)
1	38,750	62,050
2	44,300	70,900
3	49,850	79,750
4	55,350	88,600
5	59,800	95,700
6	64,250	102,800

NS-1

**MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16**

1. **Project Name: Family Law Legal Services for Low income Marin Families**

Total Amount Requested: \$27,500

3. **Project Sponsor: Family & Children's Law Center**

2.

Non-housing proposals must specify the amount requested from each planning area.

Contact Person: Shawna Hoch

Title: Administrative Coordinator

**Mailing Address:
30 North San Pedro Road, Suite 245
San Rafael, CA 94903**

**Telephone: 415-492-9230 Ext. 214
Fax: 415-479-2553
E-mail: shoch@faclc.org**

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$7,000
Novato Planning Area	\$7,000
Richardson Bay Planning Area	\$2,500
San Rafael Planning Area	\$7,000
Upper Ross Valley Planning Area	\$4,000
West Marin Planning Area	\$0

Website (optional): www.faclc.org

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. **Project Location: (Precise street address).** For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number. **30 North San Pedro Road, Suite 245, San Rafael, CA 94903**

5. **Project Description:**

Founded in 1985, FACLC is dedicated to helping low-income children and families in Marin County by providing sliding scale family law legal services to the working poor. FACLC strives to provide access to justice for low-income families and children who due to financial constraints and complex family transitions, would have no other means for representation in the courts. The overwhelming complexity of the legal system is compounded when financial barriers are present. Hit hardest by the recent downturn in our economy are low-income families – especially children. During such times, financial pressures can become unbearable and the home environment begins to or more precipitously unravel, causing their legal needs to skyrocket. Last year, FACLC provided over 1350 client appointments and the demand for such services only keeps growing. To serve more families and children in these times of great need, we need your help and support. Our goal is to break down barriers to allow access for all to the justice system.

6. **Total Project Cost:** (Include all costs for this particular project regardless of source.) **\$265,000.00**

7. **Project Budget for CDBG Funds:**

Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.

<u>POSITION</u>	<u>TOTAL COST</u>	<u>CDBG COST</u>	<u>COST PAID BY OTHERS</u>
Staff Attorney1.0	\$72,000	\$6,000	\$66,000
Staff Attorney1.0	\$51,000	\$5,000	\$46,000
Legal Director 1.0	\$91,000	\$6,000	\$86,000
Program Assistant 1.0	\$51,000	\$10,500	\$40,500

8. **Other Sources of Funds for this Project:** Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
MCF	CORE	\$85,000	7/1/13	Yes	12/1/13	Now
Special Event	CORE	\$32,500	10/18/14	Yes	10/18/14	Now
County of Marin	CORE	\$20,000	8/15/14	Yes	9/1/14	Now
Client Fees	CORE	\$100,000	N/A	Yes	Ongoing	Now

9. **Project Implementation:**

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

CDBG Funds will support the services of two Staff Attorneys, one Legal Director, and one Program Assistant. The Legal Director will continue to implement an outreach program that will provide increased awareness of the Family & Children's Law Center and its services in the community. The Legal Director will supervise the staff attorneys and oversee the day-to-day implementation of the legal program. The Program Assistant will screen all potential clients for eligibility identifying their fee rate and schedule them for an appointment to meet with a staff attorney. The Staff Attorneys will implement the legal program by meeting with an average of six clients per day and attending an average of three court hearings per week. The Program Assistant will provide administrative support to the Staff Attorneys, Legal Director and the legal program. Brochures and other informational materials will be distributed to various additional agencies and made readily available to potential clients.

10. **Need for the Project:**

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800
7	109,900
8	117,000

FACLC uses CDBG income guidelines and completes an income eligibility worksheet for each client. All Clients are required to provide written verification of income in the form of tax returns and pay stubs. The low income population is one with particular needs as they are disenfranchised due to low income, minimal resources and misinformation regarding the legal system. By providing low cost, high quality legal services the Family and Children's Law Center increases access to justice for a significant portion of the Marin County community.

B. Project Rationale: *Why is this project needed? Will it assist an especially needy or underserved group?*

The Family Law Legal Services for Low Income Marin County Families Project is critical to the well-being and functionality of the low income families in our community. Equal access to justice is a basic right that should be afforded to all, regardless of income level. Without the services of the Family and Children's Law Center, low income individuals will be left to navigate a complex and overwhelming legal system on their own, leaving them to fend for themselves to obtain domestic violence restraining orders, child custody and support orders, and other court orders that ultimately provide security for at risk families. Most self represented litigants do not have the resources or knowledge necessary to successfully represent themselves in court. Many of the issues faced in family law courts can be volatile and have long standing repercussions and implications that can negatively impact families and children who are forced to proceed without legal representation for many years to come. A report on our services prepared by the Marin Community Foundation indicates that from 2009-2012 our services had an economic impact of \$7.5 million in child support payments and a \$1.8 million reduction in domestic violence and its associated costs.

C. Equal Opportunity: *For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)*

We have found that in many cases Latino immigrants are reluctant to seek court intervention for family law matters as they are concerned that any involvement in the legal system may bring their legal status into question. We always share information about our organization including intake forms and brochures with agencies that target their services to this population, and explain to them that in the family law courts, a parties legal status is never brought into question.

If this project involves housing, how will it affirmatively further fair housing?

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people.

D. Accessibility: *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*

We are conveniently located across from the Civic Center and the Courts. Our building and offices are wheelchair accessible. If a client is unable to come to the office we can arrange for telephone/mail services. We can also arrange for home visits when special circumstances apply. We can arrange for sign language interpreters for hearing impaired clients.

E. Green Building: *For new construction or rehabilitation, what will you do to incorporate "green building" principles?*

- For further information, please call Roy Bateman (473-6698). It's ok to call with any questions at any time.
- The current year's application form must be used.
- Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.
- **Applications sent by fax or e-mail will not be accepted.**
- This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence. If you'd like to download this form as a Microsoft Word document, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.
- Don't forget to fill out the Organization Profile form.
- All County publications are available in alternative formats (Braille, large print, or CD) upon request. Requests for accommodations may be made by calling (415) 473-4381 (Voice), 473-3232 (TDD/TTY), or by e-mail at disabilityaccess@marincounty.org. This form and other County documents are available in alternative formats upon request.

DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: Family & Children's Law Center

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	79
Low income people	14
People above the low income limits	7

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
Ethnic/Racial Demographics						
Asian-American/Pacific Islander	3	3	0	0	10	n/a
African-American/Black	4	4	0	0	0	n/a
Caucasian/White	83	83	100	66.6	90	n/a
Native American	1	1	0	0	0	n/a
Mixed Heritage	0	0	0	33.3	0	n/a
Unknown/other	9	9	0	0	0	n/a
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						
Of Latino/ Hispanic Origin	39	39	0	0	0	n/a
NOT of Latino/ Hispanic Origin	61	61	100	100	100	n/a
TOTAL %	100%	100%	100%	100%	100%	100%
Age						
0-5 years old	0	0	0	0	0	n/a
6-17	0	0	0	0	0	n/a
18-24	10	10	0	0	0	n/a
25-59	88	88	100	100	80	n/a
60 +	2	2	0	0	20	n/a
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						
Female	72	72	100	100	70	n/a
Male	28	28	0	0	30	n/a
Total %	100%	100%	100%	100%	100%	100%
Disabled %						

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	0
On Advisory Committee	n/a

NS-2

**MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16**

1. **Project Name: HIV/AIDS Benefits Counseling**

2. **Total Amount Requested:** \$ 7,835
Non-housing proposals must specify the amount requested from each planning area.

3. **Project Sponsor: Marin AIDS Project**

Contact Person: Jennifer Malone

Title: Executive Director

**Mailing Address: 910 Irwin Street
San Rafael, CA 94901**

Telephone: 415 457-2487 Ext. 104

Fax: 415 457-5687

E-mail: jennifer@marinaidsproject.org

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$ 1,000
Novato Planning Area	\$ 2,335
Richardson Bay Planning Area	\$ 1,000
San Rafael Planning Area	\$ 2,500
Upper Ross Valley Planning Area	\$ 1,000
West Marin Planning Area	\$

Website (optional):

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. **Project Location: (Precise street address).** For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

910 Irwin Street, San Rafael, CA 94901

5. **Project Description:** Provide benefits counseling to very low income Marin residents living with HIV/AIDS linking them with benefits/supports to which they are entitled.

6. **Total Project Cost:** (Include all costs for this particular project regardless of source.)

\$108,000.00

7. **Project Budget for CDBG Funds:**

*Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.*

Personnel

Benefits Specialist	\$5,000
Case Manager	1,500
Benefits & Payroll taxes	1,335

TOTAL **\$7,835**

8. Other Sources of Funds for this Project: *Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?*

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
Ryan White/County of Marin	For Benefits Counseling	100,000		Yes	March 2014	Have a contract through 2/28/15

9. Project Implementation:

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

The project is part of existing Benefits Counseling services and will be implemented by our Program Manager, Leslie Gallen working with the Benefits Specialist, David Mon and the program's case manager, Bobby Moske. The funds will cover work not currently funded. Implementation will be immediate.

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800
7	109,900
8	117,000

Technically, our project will target Marin residents living with HIV/AIDS who have incomes below 400% of poverty for an individual (\$46,680/year). The majority of our clients actually have extremely low incomes below \$11,400/year and most others have incomes below \$22,800/year. Eligibility is determined by obtaining record of the past two months' income, a Marin address, HIV diagnosis and picture ID.

B. Project Rationale: *Why is this project needed? Will it assist an especially needy or underserved group?*

Connecting qualified individuals with state and federal benefits of significant financial value including MediCal, Social Security disability income and AIDS medication payments through the AIDS Drug Assistance Program is highly efficient, reducing the drain on local resources including General Assistance and emergency MediCal assistance.

Marin AIDS Project has provided benefits counseling for many years and continues to do so, funded under the federal Ryan White Act. However, Ryan White funding allocated to Marin County has decreased significantly in the past several years (14% in just the last year). There is no longer enough money to fully support the HIV/AIDS Benefits Counseling program and meet the needs of qualified Marin residents. In addition, demand for the services has increased with the introduction of The Affordable Healthcare Act and Covered California. Many people living with HIV/AIDS now qualify to obtain medical insurance as well as financial assistance with insurance premium costs. However they require professional help from a benefits specialist to access these benefits. Linking these clients with coverage means that local hospitals and healthcare providers will be paid for their services.

7/11/14

- C. **Equal Opportunity:** *For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)*

Marin AIDS Project is highly experienced in reaching out to underserved populations. We regularly analyze which population groups are least likely to engage with our services and reach out in a variety of ways to connect them with services for which they are qualified. We have active, working relationships with other providers throughout the county who aid us in engaging hard-to-reach populations. Our office is highly accessible, located centrally in San Rafael, a block from the transit station. We are open 5 days/week from 9:00 – 5:00 and have two programs operating until 7:00 pm on Tuesdays and Thursdays. Because we operate a food pantry and the county's only needle exchange services, our office 'culture' is one of warmth and acceptance. Services are available in Spanish and English.

If this project involves housing, how will it affirmatively further fair housing? N/A

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people. N/A

- D. **Accessibility:** *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*
- Our building is accessible with a flat entrance, counseling offices available on the first floor and a handicapped accessible restroom on the first floor, as well. Because we operate a mental health program, Irwin Street Counseling, we are accustomed to working with people who have mental health and substance abuse issues.
- E. **Green Building:** *For new construction or rehabilitation, what will you do to incorporate "green building" principles?*
- For further information, please call Roy Bateman (473-6698). It's ok to call with any questions at any time.
 - The current year's application form must be used.
 - Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.
 - **Applications sent by fax or e-mail will not be accepted.**
 - This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence. If you'd like to download this form as a Microsoft Word document, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.
 - Don't forget to fill out the Organization Profile form.
 - All County publications are available in alternative formats (Braille, large print, or CD) upon request. Requests for accommodations may be made by calling (415) 473-4381 (Voice), 473-3232 (TDD/TTY), or by e-mail at disabilityaccess@marincounty.org. This form and other County documents are available in alternative formats upon request.

DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

JAN10190

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: Marin AIDS Project

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	98%
Low income people	2%
People above the low income limits	0

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
Ethnic/Racial Demographics						
Asian-American/Pacific Islander	3%					
African-American/Black	14%					
Caucasian/White	80%					
Native American	2%					
Mixed Heritage	1%					
Unknown/other						
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						
Of Latino/ Hispanic Origin	20%					
NOT of Latino/ Hispanic Origin	80%					
TOTAL %	100%	100%	100%	100%	100%	100%
Age						
0-5 years old	0%					
6-17	0%					
18-24	2%					
25-59	78%					
60 +	20%					
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						
Female	15%					
Male	85%					
Total %	100%	100%	100%	100%	100%	100%
Disabled %						

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	13%
On Advisory Committee	0, but clients serve as employees (20%)& volunteers (20%)

MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL

NS-3

2015-16

NBCC
(North Bay Children's Center)

- 1. **Project Name:** Child Care Scholarships
- 3. **Project Sponsor:** North Bay Children's Center

- 2. **Total Amount Requested:** \$ 20,000
Non-housing proposals must specify the amount requested from each planning area.

Contact Person: Susan Gilmore

Title: Executive Director

Mailing Address: 932 C Street, Novato, 94949

Telephone: (415) 883-6222 **Ext.**
Fax: (415) 883-6061
E-mail: sgilmore@nbcc.net

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$
Novato Planning Area	\$ 20,000
Richardson Bay Planning Area	\$
San Rafael Planning Area	\$
Upper Ross Valley Planning Area	\$
West Marin Planning Area	\$

Website (optional): www.nbcc.net

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

- 4. **Project Location: (Precise street address).** For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

932 C Street, Novato , CA 94949, Parcel # APN 157-980-03

- 5. **Project Description:**

North Bay Children's Center, a non-profit organization, has been working in partnership with the North Bay community since 1987 to provide the highest quality child care—at affordable rates—to families across the income spectrum. NBCC also provides support services that nurture and enhance family life such as parent education and support programs, daily hot meals for our children, and scholarships for low-income families. In fact, half the children served by NBCC receive tuition assistance, enabling their parents to return to the workforce or continue their education. By offering high quality, affordable child care and family support programs, and through community collaboration, NBCC is able to both support families in their goal for self-sufficiency, as well as meet the specific needs of children Welfare reform, Hamilton Field development, and the changing needs of dual career families have accelerated the need to continue to increase the child care supply in our community

6. Total Project Cost: (Include all costs for this particular project regardless of source.)

NBCC currently requires \$608,415 to maintain its current level of scholarship service (of which aprox. \$466,244 is committed through state contracts and individual donors). The \$20,000 requested from CDBG will enable NBCC to continue scholarship support for approximately 7 income eligible children.

7. Project Budget for CDBG Funds:

*Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable. If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.*

All CDBG funding will be allocated to families in Novato who meet the CDBG guidelines for low income. Using these guidelines, NBCC has developed a sliding fee scale for families across the lower income spectrum. Parents will receive a fee reduction based on their income.

8. Other Sources of Funds for this Project: *Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?*

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
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9. Project Implementation:

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

NBCC's Finance Director and Finance Committee oversee the scholarship program. Applicants are required to work or be in training full time. All applicants submit their previous year's 1040 tax form along with a copy of their most recent paycheck and/or documentation of Cash Aid and food stamps to verify their income status.

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800
7	109,900
8	117,000

According to the Marin Child Care Master Plan, 13 percent of Marin's children under 11 live in poverty. The report identifies Novato specifically as a target area in need of funding for child care programs and scholarship. Located in the lowest per capita income area of Novato, NBCC is one of the few programs in Northern Marin that provides tuition assistance and family support serves for children from birth to 12 years of age.

Of the 171 children currently enrolled, over 80 percent are from low income families as defined by the CDBG guidelines. Of the 80 percent, 80 percent are from single parent homes where that parent is solely responsible for the financial support of their family. Of our low-income children, three families are CPS cases and are judged to be at risk of abuse or neglect.

B. Project Rationale: *Why is this project needed? Will it assist an especially needy or underserved group?*

Without NBCC's scholarship program, CDBG's target population for Novato will not be served. NBCC family case histories demonstrate that, last year over 86 economically "at risk" families avoided welfare dependency as a result of receiving scholarship funding, and are able to work or continue their education therefore reducing the cycle of poverty in our community.

NBCC has been serving low-income families since 1987. The scholarship program is a proven success and can demonstrate how the community saves in the long run by investing in these families now.

C. Equal Opportunity: *For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply.)*

NBCC is listed as a resource for tuition assistance in with our local Resource and Referral agency. Many referrals also come from other organizations that provide services for the low-income underserved families in our community.

If this project involves housing, how will it affirmatively further fair housing?

If this project involves construction, discuss your plans for recruiting women- and minority-owned firms to bid on the design and development of this project.

D. Accessibility: *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*

NBCC has been able to serve many children with emotional and developmental disabilities. The facility is wheelchair accessible and program contacts and resources include the Marin Child Care Council and Easter Seals. NBCC's scholarship program ensures accessibility to quality care for children across the income spectrum.

E. Green Building: *For new construction or rehabilitation, what will you do to incorporate "green building" principles?*

- For further information, please call Roy Bateman (473-6698).
- The current year's application form must be used.
- Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.
- **Applications sent by fax or e-mail will not be accepted.**
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- Don't forget to fill out the Organization Profile form.

DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

Organization Profile - 2015-16 Data Collection Pilot

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Name of Organization: North Bay Children's Center

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	127
Low income people	10
People above the low income limits	34

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
Ethnic/Racial Demographics						
Asian-American/Pacific Islander	4.68%					
African-American/Black	5.85%					
Caucasian/White	87.72%					
Native American	1.17%					
Mixed Heritage	.58%					
Unknown/other	0%					
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						
Of Latino/ Hispanic Origin	44.44%					
NOT of Latino/ Hispanic Origin	55.56%					
TOTAL %	100%	100%	100%	100%	100%	100%
Age						
0-5 years old	62.57%					
6-17	37.43%					
18-24						
25-59						
60 +						
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						
Female	46.78%					
Male	53.22%					
Total %	100%	100%	100%	100%	100%	100%
Disabled %						

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	
On Advisory Committee	

**MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16**

NS-4

1. **Project Name:** Novato Independent Elders Program 2. **Total Amount Requested:** \$26,000
3. **Project Sponsor:** Episcopal Senior Communities Non-housing proposals must
specify the amount requested
from each planning area.

Contact Person: Dafna Kapshud

Title: Development & Communications Manager

Mailing Address:

2185 N California Blvd, Ste 575
Walnut Creek, California 94596

Telephone: 925-956-7393 **Ext.**

Fax: 925-407-0060

E-mail: dkapshud@jtm-esc.org

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$
Novato Planning Area	\$ 26,000
Richardson Bay Planning Area	\$
San Rafael Planning Area	\$
Upper Ross Valley Planning Area	\$
West Marin Planning Area	\$

Website (optional): www.jtm-esc.org

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. **Project Location: (Precise street address).** For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

Margaret Todd Senior Center (MTSC)
1560 Hill Road, Novato, CA 94947

5. **Project Description:**

Overview, ESC/NIEP

Episcopal Senior Communities (ESC) is a non-denominational 501(c)(3) corporation that cultivates and builds healthy communities with a continuum of residential and innovative aging services that actively promote intellectual, physical, social and spiritual well-being. ESC operates six continuing care retirement communities (CCRCs) and six affordable housing communities, serving over 2,000 seniors in Alameda, San Francisco, Monterey, Sonoma and Santa Clara counties. Since its founding in 1965, ESC has provided services to low-income, isolated and frail seniors still living at home in seven Bay Area counties, including Marin. Through its charitable outreach programs, ESC reached 15,727 low-income, isolated or frail seniors in 2013-2014. One such effort supported by ESC is the Novato Independent Elders Program (NIEP), housed in the Margaret Todd Senior Center.

On July 1, 2011, ESC officially adopted the Novato Independent Elders Program from the City of Novato, which had provided quality senior services for 16 years, until a deficit reduction plan forced the program to seek new sponsorship. With strong backing from the community and fiscal sponsors, ESC successfully integrated NIEP into its Home & Community-Based Services, Senior Resources division. ESC has enjoyed support from the Marin County CDBG

Program, in addition to other senior service funders, for several years, which has enabled NIEP to not only stay in operation but to expand and thrive as well.

The ESC Novato Independent Elders Program works collaboratively with agencies and individuals to identify gaps in support services and develop programs to meet the needs of seniors in Novato and across Marin County. NIEP operates volunteer-based programs with community, corporate and organizational partners.

NIEP programs include:

- **The Home Delivered Grocery Program:** A volunteer-run project in partnership with Novato Safeway and Novato Human Needs Center. Volunteers shop for and deliver groceries to homebound and socially-isolated elderly Novato residents.
- **Margaret Todd Café:** In partnership with Good Earth Natural Foods and the County of Marin, meals are delivered to the Margaret Todd Dining Site where NIEP volunteers prepare, deliver and clean up after the meal. 6,000 meals were served in 2014.
- **The Multicultural Outreach Program:** Provides educational workshops and monthly potlucks for Spanish-speaking seniors. The Multicultural Outreach Specialist teaches citizenship classes and partners with the College of Marin to provide two ESL classes per week. Additionally, the Multicultural Specialist translates materials, recruits ESL seniors for NIEP workshops and events and assists the staff in planning inclusive, welcoming activities for seniors of diverse backgrounds. In 2014, approximately 95% of Alma Latina program participants were low-income.
- **ESC Senior Produce Market:** Seasonal produce is offered twice a month at wholesale (or below) cost, every first and third Wednesday at the Margaret Todd Senior Center. Older adult volunteers set up and administer the market, building a peer-to-peer experience around senior nutrition and wellness.
- **ESC Senior Center Without Walls:** Homebound and socially-isolated seniors can call on their telephone to participate in friendly conversation, classes and support groups. Information on this program is delivered to seniors, their families and caretakers at the Margaret Todd Senior Center.
- **Brown Bag Market:** In partnership with the Marin and San Francisco Food Banks, free food is disbursed, farmers' market-style, to low-income Novato seniors who qualify for the program. 2,860 affordable market trips were provided in 2014 to low-income seniors.
- **Yard Maintenance Program:** Local high schools, churches and volunteers help low-income, isolated and/or disabled seniors with yard clean-up and maintenance.
- **Postal Carrier Alert Program:** In partnership with the Novato post office and police department, NIEP provides a community response system using the "Seven Signs of Change" to identify if a senior is in need of assistance.
- Plus, a wide range of other senior programs to meet the diverse needs of Marin County low-income seniors, including classes, workshops and seminars.

The Margaret Todd Senior Center is also a resource and referral center where seniors, their families, caregivers and the wider Marin community can attend workshops and seminars, receive information about local programs and services for seniors, and get health and wellness services at NIEP's Annual Health Fair & Flu Clinic.

Expanded Services

Thanks in large part to ongoing assistance from funders like the Marin County Community Development Agency and in-kind support from the City of Novato, NIEP continues to offer high-quality support to seniors and expand services where they are most needed. In the last year, NIEP expanded safety-net services to Central Marin, expanded the telephone reassurance program, and helped to launch the Postal Carrier Alert Program in Sausalito and Marin City. This new program trains postal carriers to recognize signs that a senior might be in distress and connects them with local resources that can respond when a senior might need assistance (such as the police and fire departments).

Other expanded NIEP services in 2014:

- In July 2014 NIEP released its first edition of a quarterly Multicultural Newsletter. NIEP's Multicultural Outreach Specialist collects information on programs, services and other resources available to seniors from a variety of cultural backgrounds in Marin County. Each newsletter includes at least one story or pertinent article written by a member of another multicultural agency. In the first edition of the newsletter, this article was written by Vin Luu, Program Director for the Marin Asian Advocacy Project. The second edition of the newsletter comes out

in December 2014 and includes an article written by Marta Villela, Hispanic Outreach Coordinator for Whistlestop, recounting her experience immigrating to the United States.

- In partnership with the Margaret Todd Senior Center, ESC/NIEP is in the process of starting a second ESL class for beginners that are not yet ready for advanced ESL classes.
- The Brown Bag Market program expanded from twice a month to every week to better serve low-income seniors in Novato. On average, 85 people visit the Market site weekly for the free food distribution.
- NIEP's Multicultural Outreach Specialist currently sits on the Novato Community-Based Transportation Plan committee organized by the City of Novato. This committee is tasked with identifying obstacles that prevent Hispanic seniors from using public transit, such as location of bus stops and paratransit accessibility.
- Over 100 seniors attended NIEP's Senior Health Services Fair and Flu Clinic, held from 9 a.m.-noon on October 16, 2014. Thirty-two health agencies that work with seniors participated in the fair, offering free health services including 69 flu shots, 35 glucose tests, and multiple hearing and vision screenings. 40 seniors received free blood pressure screenings and several enjoyed trigger point massage. Attendees received information about home health care, Cal Fresh food stamps, the District Attorneys' Victim Witness Program, the local Alzheimer's Association, Hospice by the Bay, transportation options and much more. This year, NIEP marketed the fair to a broader multicultural community with a flyer that was distributed in both English and Spanish.
- 732 older adults from Novato and wider Marin County attended 14 educational NIEP workshops and special events, on topics such as eating healthy on a budget, Alzheimer's, vision and hearing loss, fall prevention, dealing with COPD and other respiratory problems, affordable housing options and more, including the Health Services Fair and Flu Clinic listed above.

6. Total Project Cost: *(Include all costs for this particular project regardless of source.)*

NIEP Director Salary & Benefits	\$87,091
NIEP Two Part-Time Staff	\$54,725
NIEP Operating Expenses	\$32,000
In-kind support, staff-time from partner Agencies	\$2,080
In-kind staff support from City of Novato*	\$19,099
In-kind services from City of Novato**	\$18,044
<i>Total</i>	\$213,039
<i>In-kind volunteer hours</i>	6,080 hrs

7. Project Budget for CDBG Funds:

Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.

NIEP Director Salary, Benefits	\$15,000
NIEP Part-Time Staff Salary, Benefits	\$6,000
NIEP Program Operating Support	\$5,000

8. Other Sources of Funds for this Project: *Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?*

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
County Supervisor	Staff	\$25,000	8/2014	Yes	8/2014	now
Marin Community Foundation	Staff/Programs	\$60,000	2/2014	Yes	4/2013	Now
City In-Kind	Staff/Programs Volunteer	\$37,143	Ongoing	Yes	Ongoing	Ongoing
SCAN Health Plan	Staff/Programs	\$5,000	12/2013	Yes	12/31/2013	Now
Margaret Todd Meal Program/Anonymous Donors	Staff/Programs	\$3,900*	Ongoing	Yes	8/31/2014	Now

*\$3,900 is an approximate yearly amount for irregular donations by anonymous donors to the Margaret Todd Senior Center Meal Program.

9. Project Implementation:

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

The ESC/NIEP Director has a long history of managing senior services in Novato and works together with the ESC Vice President of Home & Community-Based Services to make strategic decisions about the future of the NIEP program. The ESC/NIEP director works with two part-time staff in addition to multiple city and county partners and a cadre of dedicated volunteers to keep the programs running and expand new offerings throughout Marin.

ESC/NIEP staff continues to look for ways to enhance existing programs for Novato seniors and expand programming and resources to the greater Marin County. The plan for 2015 includes adding a Skin Cancer Screening Clinic and Dental Health Fair, and expanding the ElderWISE Friendly Visitors program.

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800
7	109,900
8	117,000

NIEP serves the needs of isolated, frail and low-income seniors from a variety of cultural backgrounds in Novato, as well as their family members and caregivers. Many of the programs at the Margaret Todd Senior Center are at no or low-cost, and all of the outreach efforts specifically target low-income, isolated and/or at-risk seniors. ESC/NIEP continues to expand services, including the Postal Carrier Alert, Home Delivered Grocery, Telephone Reassurance, Senior Center Without Walls and Emergency Fund programs to new areas in Marin County. (See below for further information in answer to this question.)

B. Project Rationale: *Why is this project needed? Will it assist an especially needy or underserved group?*

NIEP reported over 16,142 client contacts with seniors through its various programs and services in 2014. Approximately 32% of Novato's total population of 53,301 is over the age of 55 and, according to the population demographics from the 2014 California Department of Aging, 68,174 seniors over 60 years of age reside in all of Marin County. Data from the California Department of Finance shows that the elderly population is expected to comprise 26% of the population increase in Marin by 2040, with the greatest percentage increase in those elderly over 75 years of age. According to the Marin Commission on Aging, by 2020 one out of every three Marin residents will be 60 years of age or older. Although the recession is officially over, economic growth has been slow, particularly for the most vulnerable populations, including low-income, frail and isolated seniors. With a shrinking number of services and a senior population that is set to grow exponentially as the Baby Boomers continue to age, the economic forecast is not

bright for aging adults. A steadily increasing number of services and programs, such as those provided by ESC/NIEP, are needed now and in the very near future. ESC/NIEP's programs fill gaps in services, reduce isolation, provide information and referral services, promote healthy living and offer volunteer opportunities for those who want to give back to their community. With the support and assistance of Episcopal Senior Communities, the County of Marin and the City of Novato, at-risk seniors in Marin, their family members and caregivers will continue to benefit from a variety of support programs.

NIEP programs are open to all income levels; however, CDBG funds have always been used to fund programs such as Alma Latina, Brown Bag Market and the Yard Maintenance Program, which specifically target low-income and isolated seniors. According to "A Report on Services for Older Adults in Marin" from the Marin Community Foundation, service providers reported that 75% of their clients are low-income seniors. Client intake shows nearly 1,000 unduplicated NIEP clients qualify as low or very-low income.

Listed below are some examples of the ways in which NIEP serves seniors in need:

- NIEP volunteers served 6,000 meals to seniors (95% low-income) at the Margaret Todd dining site in 2014.
- In 2014, 267 Hispanic seniors (approximately 95% of whom are low-income) participated in NIEP's Alma Latina program. The Cultural Outreach Program continues to work with diverse groups of seniors by offering citizenship classes, ESL classes and enrichment activities aimed at improving wellness and quality of life. Furthermore, as a member of the City of Novato's Senior Coordinating Council, NIEP continues to work to make public transit more accessible for seniors from diverse cultural backgrounds.
- 500 copies of NIEP's new quarterly Multicultural Newsletter, which includes information on programs, services and other resources available to Marin County's seniors from a variety of cultural backgrounds, have already been distributed.
- 38 low income seniors received financial assistance to help pay late rental fees, PG&E bills and other essential services through the ESC Senior Resources Safety Net Funds Program, while each week approximately 85 low-income seniors receive food distributed at the Brown Bag Market at the Margaret Todd Senior Center.
- Two ESC/NIEP programs have an income limit of \$39,850 for a single-person household or \$42,200 for a two-person household: the Seasonal Yardwork Program (which served 70 seniors in 2014) and the Brown Bag Market program (which provided 2,860 affordable market trips in 2014 to low-income seniors). Participants in both programs must provide proof of public assistance or a recent tax return.

- C. Equal Opportunity: *For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)*

ESC and NIEP recognize the inherent challenges in serving a growing, culturally-diverse population. This past year, Episcopal Senior Communities created the new position of Director of Diversity Initiatives and extended the hours for its Marin County Multicultural Outreach Specialist in order to better serve and reach a population that is increasingly becoming more culturally diverse. This new commitment of resources comes as a result of ESC's dedication to being culturally inclusive and serving as a resource for a variety of programs.

The Multicultural Outreach Specialist schedules educational speakers, translates information materials and develops social programs for seniors from a variety of cultural backgrounds, such as the monthly Alma Latina potluck dinners and seasonal events. She also works collaboratively with other agencies representing a broad range of ethnicities and cultures to produce NIEP's new Multicultural Newsletter, which connects people from varied backgrounds to important resources. Additionally, the NIEP Director conducts informational presentations to a wide range of senior groups, from senior LGBT organizations to the SIRS and rotary clubs.

NIEP also maintains ongoing relationships with over 30 organizations and businesses to effectively coordinate, provide services to and reach Novato's isolated, frail and multicultural senior population. ESC/NIEP provides non-English and limited English-speaking older adults and their families with information regarding immigration and citizenship matters, voter education and translation services. The program also coordinates with the College of Marin to provide ongoing ESL classes at the Margaret Todd Senior Center. NIEP provides one-on-one assistance with forms and helps non-English speaking seniors to understand how and where to access services, including healthcare and housing.

The NIEP program employs a variety of methods to reach demographic groups least likely to apply. Using advertising fliers, print advertisements, newsletters and word of mouth, NIEP provides information for seniors, family members, caregivers and service providers. NIEP also disseminates program information to a variety of affordable housing sites,

senior centers (including Margaret Todd), retirement communities and private homes through a network of volunteers, nonprofits and public service agencies. Furthermore, homebound and isolated seniors receive information about NIEP's programs and services through notices delivered as part of the Postal Carrier Alert program. ESC has grown its presence in Marin by expanding its home care program and the program's marketing team also actively supports and communicates about the NIEP programs in all presentations and marketing material.

If this project involves housing, how will it affirmatively further fair housing?

N/A

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people.

N/A

- D. Accessibility: *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*

The Margaret Todd Senior Center, which houses NIEP, is accessible to people of all abilities. One of NIEP's goals is to identify and fill gaps in resources for isolated, frail, at-risk, low-income and culturally diverse seniors. The program provides the most comprehensive, cost-effective and easily accessible services possible. Several NIEP programs, such as the Seasonal Yardwork and Home-Delivered Grocery programs, send volunteers to the homes of seniors with limited or no mobility. Using telephone conference calls, Senior Center Without Walls offers classes for seniors who are unable to travel outside their homes. In addition, ESC/NIEP operates a Telephone Reassurance Program, which places phone calls to participating older adults, with the explicit purpose of checking on their wellness and connecting them with resources that they may need. The Postal Carrier Alert and Home Delivered Grocery programs reach homebound and socially isolated seniors in their own homes. NIEP employs the same targeted outreach listed above to spread the word about its programs for enhancing accessibility for older and disabled adults.

- E. Green Building: *For new construction or rehabilitation, what will you do to incorporate "green building" principles?*

N/A

- For further information, please call Roy Bateman (473-6698). It's ok to call with any questions at any time.
- The current year's application form must be used.
- Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.
- **Applications sent by fax or e-mail will not be accepted.**
- This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence. If you'd like to download this form as a Microsoft Word document, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.
- Don't forget to fill out the Organization Profile form.
- All County publications are available in alternative formats (Braille, large print, or CD) upon request. Requests for accommodations may be made by calling (415) 473-4381 (Voice), 473-3232 (TDD/TTY), or by e-mail at disabilityaccess@marincounty.org. This form and other County documents are available in alternative formats upon request.

DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: Episcopal Senior Communities / Novato Independent Elders Program (NIEP)

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	22%
Low income people	70%
People above the low income limits	8%

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
<i>Ethnic/Racial Demographics</i>						
Asian-American/Pacific Islander	40%	10%	50%	5%	7%	7%
African-American/Black	12%	4%		10%	7%	7%
Caucasian/White	32%	61%		70%	86%	86%
Native American		1%				
Mixed Heritage				5%		
Unknown/other	16%	24%	50%	10%		
TOTAL %	100%	100%	100%	100%	100%	100%
<i>Latino/Hispanic Origin</i>						
Of Latino/ Hispanic Origin	16%	24%	50%	10%		14%
NOT of Latino/ Hispanic Origin	84%	76%	50%	90%	100%	86%
TOTAL %	100%	100%	100%	100%	100%	100%
<i>Age</i>						
0-5 years old						
6-17						
18-24						
25-59	2%	2%	50%	85%	26%	78%
60 +	98%	98%	50%	15%	74%	22%
TOTAL %	100%	100%	100%	100%	100%	100%
<i>Gender</i>						
Female	80%	70%	50%	90%	26%	78%
Male	20%	30%	50%	10%	74%	22%
Total %	100%	100%	100%	100%	100%	100%
Disabled %	Unknown; ESC serves people of all abilities but does not collect ability data at this time					

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	0%
On Advisory Committee	0%

Organization Profile – 2015-16 Data Collection Pilot

Income Limits

Household Size	Very Low Income Limit (≈50% of Median Income)	Low Income Limit (≈80% of Median Income)
1	38,750	62,050
2	44,300	70,900
3	49,850	79,750
4	55,350	88,600
5	59,800	95,700
6	64,250	102,800

NS-5

**MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16**

1. **Project Name: Novato Youth Center** 2. **Total Amount Requested:** \$15,000
SCHOLARSHIPS
 3. **Project Sponsor: Novato Youth Center**
 Non-housing proposals must specify the amount requested from each planning area.

Contact Person: Cheryl Paddack

Title: Executive Director

Mailing Address:

680 Wilson Ave.
Novato, CA 94947

Telephone: (415) 892-1643 Ext. 228

Fax: (415) 892-5098

E-mail: cpaddack@novatoyouthcenter.org

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$
Novato Planning Area	\$15,000
Richardson Bay Planning Area	\$
San Rafael Planning Area	\$
Upper Ross Valley Planning Area	\$
West Marin Planning Area	\$

Website (optional): www.novatoyouthcenter.org

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. **Project Location: (Precise street address).** For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

Novato Youth Center
680 Wilson Ave.
Novato, CA 94947

5. **Project Description:**

The Novato Youth Center (NYC) requests \$15,000 to provide continued scholarship assistance for low-income working parents of children ranging in age from 12-months to age 14. Last year we served 225 children, 50% of whom were from low-income, working families. Of those served, 71% were youth of color, 48% of whom were Latino. The ethnic diversity in our program greatly exceeds the demographic composition of the larger Novato community, as the percentage of people of color in Novato is 34% (U.S. Census Bureau, 2010 Census).

Affordable childcare is a continued need in Novato and Marin. The number of subsidized care slots made available through funding from the California Department of Education is not sufficient to cover the need, as there are approximately 800 children throughout Marin who are currently on the waiting list. Working parents from less-resourced families face the difficult decision of either keeping their children home alone or reducing their work hours, a compromising predicament and significant step backwards for those who are striving for self-sufficiency.

We are a licensed childcare program (since 1983), open Monday through Friday from 7:00am to 6:00pm for children 12-months through 4-years-old and operating 7:00am-9:00am and again from 2:00pm-6:00pm for our school-age participants on school days. On school days, we transport school-age children to and from Novato's elementary and middle schools. On non-school days, we provide academic enrichment and field trips all over the greater Bay Area.

The Novato Youth Center's Child Development programs include Early Care & Education and the school-age programs, It's All Elementary! and 1-Up-4 College Middle School, both of which offer intensive academic enrichment and leadership development.

Teachers and aides participate in on-going professional development and provide daily age-appropriate curriculum for each age group. Our Food Program provides a nutritious breakfast, lunch and snack for all participants each day and is partially funded by a Federal Food Grant. Our facility; which includes a full-sized gymnasium, library, playgrounds, art studio, commercial kitchen/dining room and other classrooms; allows us to support children's development in the areas of academics, health and well-being, arts and athletics, and social interaction and community engagement.

Childcare families have access to additional on-site services at our center, including youth and family counseling, sports leagues, and parent workshops.

6. Total Project Cost: *(Include all costs for this particular project regardless of source.)*

Total cost of NYC's child development programs is \$1,043,586.67

7. Project Budget for CDBG Funds:

*Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.*

The \$15,000 requested would allow 6-7 children to receive high-quality childcare services in a safe, nurturing environment with daily academic enrichment with scholarships ranging from 10% to 50% depending on income level and family size.

8. Other Sources of Funds for this Project: *Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?*

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
CA Dept. of Education	Childcare scholarships	\$203,756	11/13	Yes	7/14	Annual contract
Community Action Marin (CAM)	Childcare scholarships	\$66,909	5/14	Yes	7/14	Monthly (ends 7/13)
Marin Community Foundation (MCF)	Program support and childcare scholarships	\$75,000	5/14	Yes	7/14	Currently
County of Marin & MCF subsidized childcare safety net	Childcare scholarships	\$15,200	6/14	Yes	10/14	FY15
Secured Other foundation funding	Program support	\$17,296	Various	Yes	Various	FY15
Pending Other foundation funding	Program support	\$15,000	Various	No	Various	FY15
Food Program	Food Program	\$33,500	5/14	Yes	7/14	FY15

9. Project Implementation:

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

NYC's Child Development Program Managers evaluate and prioritize family need based on income, family size and referrals from outside agencies such as Child and Family Services. Eligibility will be determined by family certification interviews twice annually, documenting income from pay stubs and/or tax returns. A family fee schedule is used to determine the family's portion of monthly fees, based on the Marin County Community Development Block Grant guidelines. Child development services are provided year-round and families may enroll at any time.

NYC partners with the Marin Childcare Council which maintains a Central Eligibility List for low-income working parents in need of state childcare subsidization. It is for the families who do not qualify for state and federal assistance, yet can be considered for CDBG funds due to the higher income limits in Marin County, that we seek assistance.

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800
7	109,900
8	117,000

Low-income families will benefit from this project, specifically those who earn less than the CDBG income limits but more than the State Department of Education limits for subsidized childcare. As mentioned above, eligibility will be determined by family certification interviews twice annually, documenting income from pay stubs and/or tax returns. A family fee schedule is used to determine the family's portion of monthly fees, based on the Marin County Community Development Block Grant guidelines.

B. Project Rationale: *Why is this project needed? Will it assist an especially needy or underserved group?*

This project is needed because so many working families struggle to reach or maintain self-sufficiency due to the high cost of living in Marin County. The 2014 Self-Sufficiency Standard indicates that it takes an annual income of \$87,263 for a family of four (two adults, a child in preschool, and a school-age child) in Marin to meet basic needs. To meet this standard, both working adults would have to hold *three* minimum wage jobs *each*. With the housing market bouncing back and both home and rental prices increasing (Trulia.com and Trovit.com, respectively), local families are even more stretched financially and struggling to cover costs such as childcare, healthcare, housing and food. Another indicator of financial need is the percentage of students qualifying for free and reduced lunch; it has doubled since 2001, according to Novato Unified School District data. Additionally, Marin's cost of living is increasing, according to the cost of living index.

The cost of childcare is a barrier to families achieving financial self-sufficiency. This project and the partially subsidized childcare it provides allows parents in low-income households to work (often multiple jobs) or to continue their education. This in turn promotes upward mobility: employment is maintained, promotions are won, academic degrees are completed, and the children of those parents see that mobility is possible. CDBG funding is particularly beneficial in instances where a job promotion or raise bumps families from qualifying for state or federal subsidy, forcing them to either decline the advancement or stop accessing our services when the pay increase is not significant enough for them to be able to afford the fee increase. CDBG funds help these families bridge this time in their life, providing partial subsidy while allowing parents to advance in their career. Twice annually, Program Directors check in on the family's progress towards economic stability/self-sufficiency and reassess family fees for that time period. Without affordable childcare, it is difficult for families to pursue economic self-sufficiency.

C. Equal Opportunity: *For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)*

As noted earlier, the ethnic diversity in our program greatly exceeds that of Novato at-large. We pride ourselves on serving youth of all ethnic, gender and socio-economic backgrounds. Specifically, the demographic groups within our childcare programs compare to those of Novato as is shown in the following table:

	African Am.	Asian Am./PI	Caucasian	Hispanic	Multi/Other
NYC Childcare	5.8%	8.4%	29.3%	48.4%	8.0%
Novato	2.7%	6.6%	65.8%	21.3%	5.7%

(Note: Because NYC asks participants to specify race/ethnicity differently than does the U.S. Census, we are unable to compare percents of some groups, i.e., Native American, Native Hawaiian, etc.) Our least served demographic group is that of middle to high income Caucasians, a group that in not overcoming a legacy of exclusion. Still, we are in the process of implementing improvements that will increase our organizational cultural competency, making our services more welcoming to all. Last year, we conducted an organizational cultural competency assessment, and from that data, we identified four priority areas: professional development, administrative processes, content & curriculum, and

the Board of Directors. We have already facilitated an all staff activity in order to lay the ground work for professional cultural competency trainers to work with our staff, and we are in conversations with various trainers, one of which will provide a workshop in the spring. When our cultural competency committee reconvenes, we will further map out our implementation plan in each of the priority areas.

If this project involves housing, how will it affirmatively further fair housing?

N/A

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people.

N/A

- D. **Accessibility:** *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*

NYC is unique in that we successfully serve children and their families who have a variety of special needs. A few years ago, we participated in a disability access survey and hired a company to do an ADA-compliant assessment of our facility. We found we were on-target with our modifications. Four years ago, we installed a wheelchair accessible registration table in our lobby for use by parents and one of our staff members who is in a wheelchair. Two years ago, we also added a wheel-chair accessible stage, and last year we purchased a wheel-chair accessible van so participants in wheelchairs have the same access to activities like fieldtrips that other participants have. Restrooms and all primary activity areas are wheelchair accessible, and we have on-site mental health clinicians that provide support to families and teachers when working with emotionally and/or behavior-challenged children. Additionally, we have worked for several years with a psychologist who observes children in our early care and education program on a weekly basis, diagnoses cognitive disabilities, and then advises our teachers and parents on how to better support their growth.

- E. **Green Building:** *For new construction or rehabilitation, what will you do to incorporate "green building" principles?*

Our project does not include new construction or rehabilitation. However, on an ongoing basis we make improvements based on green building principles in order to be more efficient, such as replacing light fixtures. Whenever applicable, we always buy green and energy saving equipment.

- For further information, please call Roy Bateman (473-6698). It's ok to call with any questions at any time.
- The current year's application form must be used.
- Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.
- **Applications sent by fax or e-mail will not be accepted.**
- This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence. If you'd like to download this form as a Microsoft Word document, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.
- Don't forget to fill out the Organization Profile form.
- All County publications are available in alternative formats (Braille, large print, or CD) upon request. Requests for accommodations may be made by calling (415) 473-4381 (Voice), 473-3232 (TDD/TTY), or by e-mail at disabilityaccess@marincounty.org. This form and other County documents are available in alternative formats upon request.

DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: Novato Youth Center

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	Please note, we only track income for childcare participants. 50% are low income or very low income and are on a scholarship or subsidy.
Low income people	
People above the low income limits	

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
Ethnic/Racial Demographics						
Asian-American/Pacific Islander	5%	16.6%		3%		
African-American/Black	4%		8%			
Caucasian/White	82%	83.3%	84%	97%	94%	100%
Native American	(included in "other")		8%			
Mixed Heritage	4%				6%	
Unknown/other	5%					
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						
Of Latino/ Hispanic Origin	45%	50%	38%	28%	6%	0%
NOT of Latino/ Hispanic Origin	55%	50%	62%	72%	94%	100%
TOTAL %	100%	100%	100%	100%	100%	100%
Age						
0-5 years old	8%					
6-17	67%				12%	
18-24	4%		23%	9%		
25-59	21%		69%	78%	70%	55%
60 +			8%	13%	18%	45%
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						
Female	61%	33.3%	77%	94%	35%	27%
Male	39%	66.6%	23%	6%	65%	73%
Total %	100%	100%	100%	100%	100%	100%
Disabled %	unknown	0%				

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	12%
On Advisory Committee	0%

Organization Profile – 2015-16 Data Collection Pilot

Income Limits

Household Size	Very Low Income Limit (≈50% of Median Income)	Low Income Limit (≈80% of Median Income)
1	38,750	62,050
2	44,300	70,900
3	49,850	79,750
4	55,350	88,600
5	59,800	95,700
6	64,250	102,800

NS-6

**MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-2016**

1. **Project Name:**
Quality Care for Kids
3. **Project Sponsor:**

2. **Total Amount Requested:** \$12,500
Non-housing proposals must
specify the amount requested
from each planning area.

Contact Person:
Kara Hanks
Title: Exec. Director

Mailing Address:
Quality Care for Kids
P.O. Box 2037
Novato, CA 94948
Telephone: 415-892-4111
Fax: 415-897-0455
E-mail:
karahanks@novato.net

Ext.

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$
Novato Planning Area	\$12,500
Richardson Bay Planning Area	\$
San Rafael Planning Area	\$
Upper Ross Valley Planning Area	\$
West Marin Planning Area	\$

Website (optional):

All future announcements will be sent to you by e-mail, unless you indicate otherwise: [] Please send by mail

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. **Project Location: (Precise street address).** For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.
Two centers located on Elementary School Sites in the Novato Unified School District. Olive Site Address: 629 Plum Street, Novato 94945; Lynwood Site Address: 1320 Lynwood Drive, Novato 94947.

5. **Project Description:**
The extended Day program at Quality Care for Kids, Lynwood and Olive School sites operates 12 months of the year (approximately 248 days). Our hours of operation are 7:00 a.m. to 6:30 p.m. with before and after school care during the school year and full child care during school holidays and summer vacation. We are licensed for 72 children at each Center and have over 90 children enrolled in our program. Children in grades K-6 are served. We strive to serve all parents. Quality Care for Kids offers full time care for working parents and drop-in child care for those parents who are working part-time or have irregular hours.

The program has been in operation for more than twenty-seven years. Kara Hanks, Executive Director, has a Bachelors Degree in Business, previously was the President of our Board and has been active in the community including her past service as a Director/Officer of the Novato Downtown Business Association. The Site Directors, Head Teachers and Teachers have ECE (Early Childhood Education) and administration units from accredited schools and programs.

The Quality Care for Kids program is based on our goal of helping children develop to their full potential. A socially and enriching environment is created through well-planned activities. We value children and motivate them to value themselves and others. We recognize and honor the different ethnic and social backgrounds of children, thus enhancing their individual self-esteem while encouraging them to understand and accept others. Our program exposes children to opportunities that they otherwise would not have available to them. By providing high quality child care, children have a safe, nurturing, educational and loving place to go before and after their school day & during summer.

6. Total Project Cost: *(Include all costs for this particular project regardless of source.)*

Out of the eight schools in NUSD, Olive and Lynwood have the greatest number of parents with very low family incomes. Each year we see a notable increase in the families who are in need of financial assistance to ensure safe and quality care for their children. The increases in need are due to the poor economy, rezoning of schools in Novato and an increase in our ethnic communities. We are therefore requesting \$12,500 in tuition scholarships for these children.

7. Project Budget for CDBG Funds:

Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.

The entire \$12,500 scholarship money would be used toward partial scholarships for high risk, low-income children of families who are below Community Development Block Grant Income guidelines. Presently, over 77% of our children are below Community Development Block Grant income limits. This number continues to rise year after year.

8. Other Sources of Funds for this Project: *Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?*

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
Cal-Works Marin Childcare Council	Scholarships	variable				
	Scholarships	variable				

9. Project Implementation:

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

Kara Hanks, Executive Director and Jana Funk, Site Director, will be responsible for overseeing the scholarship funds. Kara and Jana will assess the family needs of those applying and use these funds for those children who fall into the CDBG income limits. Verification of income is required and scholarships are awarded to families with the greatest need. We will use the grant on a month-to-month basis, projecting our budget to reserve funds for the entire year.

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limits
1	\$59,100
2	67,550
3	76,000
4	84,400
5	91,200
6	97,950
7	104,700
8	111,450

Children of families below the CDBG income limits will benefit from these scholarships. The information for the tuition scholarships will be documented on confidential family income cards assessing their household size and the CDBG guidelines for income limits. Presently, over 77% of the families attending Quality Care for Kids are at or below the CDBG income limit. Now, more than ever before, we are seeing families struggling to hang on, in fear of losing jobs and worrying about care for their children in these hard economical times. \$12,500 of funding for tuition scholarships will allow QCFK to provide child care for families who desperately need help in providing a safe and nurturing environment for their child to go before and after school and during the summer months.

B. Project Rationale: *Why is this project needed? Will it assist an especially needy or underserved group?*

The \$12,500 tuition scholarship funds are more essential than ever to help families gain and maintain productive employment and prevent child neglect, family violence and disintegration and child abuse. CDBG has been a great assistance to these families so the children do not become latchkey children, therefore enabling QCFK to meet the additional needs of low-income working families in our community. Support would target the growing number of low-income, at-risk children and families, especially with the poor economy conditions and the potential lack of other funding from the state of California. Over seventy percent of the Lynwood School children and a vast growing percentage of Olive School children qualify within the guidelines as low-income families, demonstrating the intensity of the number of low-income children located at these Novato Schools. Locating adequate, appropriate and affordable child care poses a major problem for these families as they face the greater economic burden of paying a larger share of their monthly income for child care. QCFK is an essential element of family and community life for these families and the tuition scholarships will promote and support our community.

C. Equal Opportunity: *For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)*

Quality Care for Kids is located on the campus of two Novato Elementary Schools and 99% of our children attend these schools. Announcements are posted in the Novato Elementary School and Quality Care for Kids newsletters regarding the availability of scholarships from CDBG. We actively seek verbal recommendations from our existing and past families who are familiar with our program. Quality Care for Kids markets in the Novato Parks and Recreation summer guides to reach out to families in Novato and Marin County offering services and scholarships to working families during the summer months. Our literature is available in English and Spanish and we have staff to assist in communicating with Hispanic speaking families. We welcome all children and strive to accommodate everyone into our program. All families who inquire about our program and services are invited to apply for the Community Development Block Grant and literature and application materials are available for all inquiries.

If this project involves housing, how will it affirmatively further fair housing?

Not applicable

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people.

Not applicable

D. Accessibility: *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*

Quality Care for Kids meets OSHA approved standards for handicapped access. Quality care has a low children-to-staff ratio allowing us the ability to work individually and in small groups with physically handicapped as well as emotionally disturbed or developmentally disabled children who may have difficulty in large group situations.

E. Green Building: *For new construction or rehabilitation, what will you do to incorporate "green building" principles?*

Not applicable

- For further information, please call Roy Bateman (473-6698). It's ok to call with any questions at any time.
- The current year's application form must be used.
- Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157
- **Applications sent by fax or e-mail will not be accepted.**
- This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence. If you'd like to download this form as a Microsoft Word attachment, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.
- Don't forget to fill out the Organization Profile form.

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DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: Quality Care for Kids

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	
Low income people	
People above the low income limits	

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
<i>Ethnic/Racial Demographics</i>						
Asian-American/Pacific Islander						
African-American/Black						
Caucasian/White						
Native American						
Mixed Heritage						
Unknown/other						
TOTAL %	100%	100%	100%	100%	100%	100%
<i>Latino/Hispanic Origin</i>						
Of Latino/ Hispanic Origin						
NOT of Latino/ Hispanic Origin						
TOTAL %	100%	100%	100%	100%	100%	100%
<i>Age</i>						
0-5 years old						
6-17						
18-24						
25-59						
60 +						
TOTAL %	100%	100%	100%	100%	100%	100%
<i>Gender</i>						
Female						
Male						
Total %	100%	100%	100%	100%	100%	100%
<i>Disabled %</i>						

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	
On Advisory Committee	

Organization Profile – 2015-16 Data Collection Pilot

Income Limits

Household Size	Very Low Income Limit (≈50% of Median Income)	Low Income Limit (≈80% of Median Income)
1	38,750	62,050
2	44,300	70,900
3	49,850	79,750
4	55,350	88,600
5	59,800	95,700
6	64,250	102,800

MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16

1. Project Name: Senior Access

2. Total Amount Requested: \$54,460

3. Project Sponsor:
Senior Access
Contact Person:
James Ward
Title: Executive Director

Non-housing proposals must specify the amount requested from each planning area.

Mailing Address:
70 Skyview Terrace, Bldg B
San Rafael, CA 94903

Telephone: 415-491-2500 Ext. 11
Fax: 415-491-2503
E-mail: jward@senioraccess.org

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$6,260
Novato Planning Area	\$14,200
Richardson Bay Planning Area	\$6,000
San Rafael Planning Area	\$20,000
Upper Ross Valley Planning Area	\$8,000
West Marin Planning Area	\$0

Website (optional): www.senioraccess.org

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. Project Location: (Precise street address). For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

Senior Access
70 Skyview Terrace, Bldg B
San Rafael, CA 94903

5. Project Description:

The Senior Access Financial Assistance Fund provides financial assistance to Marin County's low, very low and extremely low income residents who have dementia and/or related chronic conditions for attendance at Senior Access' Adult Day Program (ADP). More than one-third of Marin residents are over the age of 60; of these older adults, 10% live with cognitive decline and require considerable personal care. Senior Access (SA) offers people with dementia and their caregivers an affordable alternative to in-home or nursing home care. SA is the only social model ADP in the county, meeting critical needs for caregivers and older adults **who would otherwise not be served**. With an annual budget of \$708,655, SA maintains a staff of 5 (FTE equivalent) and an active volunteer and University intern program. SA operates its programs in San Rafael.

ADP participants enjoy current events, expressive arts, concerts, trivia, word games and exercise as well as healthy snacks and lunch. Services include intake screening and assessment; development of an individual care plan; and assistance with toileting, ambulating, transferring and eating. While the ADP is in session, family caregivers get time “off” from the requirements of 24-hour caregiving and can take advantage of information and referrals from the resource center and share resources at the free monthly caregiver support group. SA conducts educational workshops, brain fitness events and memory screenings, all provided at no cost to the community.

The SA Excursion Clubs offers folks with memory loss a chance to go out into the community and enjoy the cultural and historical environment of the Bay Area. The Excursion Clubs are designed for older adults with early stage memory loss and are a “soft” entry into a supervised day program. Excursion Clubs are more appealing to individuals in the earlier stages of dementia because they prefer to be out in the community with peers. Excursions offer an opportunity to bond with new friends and families. Because excursion destinations are well-known, popular attractions, the Club is perceived as more inviting to families unfamiliar with dementia care options. Families perceive there are fewer stigmas with an excursion program. Family and potential Club Members are often eager to try out the Excursion Club while becoming familiar with the range of services available. The popularity of the Excursion Clubs has led our Program Team to envision developing Excursion Clubs that target the needs of diverse groups throughout our service areas. New strategies for the expansion of programs are currently under discussion for implementation in 2015.

Research studies indicate that ADPs reduce premature placement in skilled nursing facilities. In addition, the SA Caregiver Impact Survey demonstrated that 98% of respondents agreed that their quality of life and their loved one’s quality of life improved because of the SA program.

SA’s service area includes all of Marin County. In 2013-14, the SA Financial Assistance Fund subsidized 1,230 days of care and 6,150 hours of caregiver respite. The average \$32 award reduced the \$105 daily fee to \$73 per day for low-income members. Though the numbers vary, the Financial Assistance Fund supported an average of 103 days of care each month. In addition, SA held 12 Caregiver Support Groups, 5 aging workshops to non-English speaking and predominantly African American community groups, 10 memory screenings and 8 Brain Fitness Workshops.

6. Total Project Cost: *(Include all costs for this particular project regardless of source.)*

The projected cost of the 2015-2016 Financial Assistance Fund is \$54,460. **The amount reflects direct awards and does not reflect any administrative costs connected to administering and reporting on the funds.** Based on 2013-2014 Club statistics, 46% of all participants are low income; of this group of low-income participants, 31% are extremely low-income. All recipients of CDBG funds must qualify using the current HUD standards.

ANNUAL Budget for the Senior Access Financial Assistance Fund

<u>Planning Area</u>	<u>Low Income</u>	<u>Very Low Income</u>	<u>Extremely Low Income</u>	<u>Annual TOTAL</u>
Lower Ross	\$1,500	\$3,000	\$4,500	\$9,000
Novato	\$3,000	\$6,000	\$11,000	\$20,000
Richardson Bay	\$1,500	\$3,000	\$6,000	\$10,500
San Rafael	\$3,000	\$6,000	\$17,500	\$26,500
Upper Ross	\$1,500	\$3,000	\$4,500	\$9,000
West Marin	\$0	\$0	\$0	\$0
TOTAL	\$10,500	\$21,000	\$43,500	\$75,000

Note that the project budget will increase with the implementation of new programs. Breakdown among planning areas will adjust to reflect community response to the affirmative marketing strategies.

7. Project Budget for CDBG Funds:

Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor’s written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.

The \$54,460 request for CDBG Funds comprises 73% of the projected \$75,000 budget of the 2015-16 Financial Assistance Fund. It is expected that \$4,549 of CDBG Funds will be used monthly, with \$2,793 supporting extremely low income, \$1,186 supporting very low income and \$560 supporting low income participants per month.

ANNUAL Budget for CDBG Funds

<u>Planning Area</u>	<u>Low Income</u>	<u>Very Low Income</u>	<u>Extremely Low Income</u>	<u>Annual TOTAL</u>
Lower Ross	\$960	\$1,640	\$3,660	\$6,260
Novato	\$1,920	\$4,080	\$8,200	\$14,200
Richardson Bay	\$960	\$1,450	\$3,590	\$6,000
San Rafael	\$1,920	\$4,080	\$14,000	\$20,000
Upper Ross	\$960	\$2,980	\$4,060	\$8,000
West Marin	\$0	\$0	\$0	\$0
TOTAL	\$6,720	\$14,230	\$33,510	\$54,460

Note that the annual need for financial assistance may increase with the implementation of new programs. Breakdown among planning areas will adjust to reflect community response to the affirmative marketing strategies.

8. Other Sources of Funds for this Project: *Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?*

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
Alzheimer’s Foundation of America (AFA)	Respite	\$5,000	5/2014	Yes	7/2014	Now
The Dr. Marjorie Belknap Fund *	Financial Assistance	\$20,000	9/2014	Yes	As of 11/2014	TBD by SA Board Financial Assistance committee
Family Caregiver Alliance	Respite	\$1,000	10/2204	Yes	10/2014	Awarded by FCA

* The Dr. Marjorie Belknap Fund honors our past board president and community leader and is dedicated to financial assistance for families in need. SA and Dr. Belknap introduced this fund to the community in 2014 and have integrated fundraising for the Fund as part of a comprehensive development plan.

9. Project Implementation:

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

The Financial Assistance Committee manages and evaluates the funds. The Financial Assistance Committee is comprised of the Executive, Program and Finance Directors and the Finance Committee of the Board of Directors. The Committee determines annual financial award amounts and distribution limits per client; tracks the balance of the Fund throughout the fiscal year; and is responsible for maintaining Financial Assistance Fund policies and procedures. The Program Director is responsible for determining eligibility for assistance via financial documents provided by families, administering the financial assistance funds and conducts annual financial evaluations for all financial assistance recipients. The Finance Director retains all confidential financial documents. The Executive Director and Board of Directors are responsible for securing funds for the program.

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800
7	109,900
8	117,000

The Financial Assistance Fund benefits low-income adults with Alzheimer’s disease, dementia or other chronic health conditions who are dependent on a family member, friend or conservator for their care. One-hundred percent of project beneficiaries have incomes below the CDBG Low-Income limits. In 2013-14, 78% of recipients were Extremely Low income; 11% were Very Low income; and 11% were Low income. The average age of financial assistance recipients was 86 years-old; 75% were female; 25% were male. Of the 2013-2014 financial assistance recipients: 46% lived in San Rafael; 18% lived in Novato; 18% lived in Upper Ross Valley, 11% in Lower Ross Valley, and 7% in Richardson Bay Area. New programming may change these ratios as we reach out to folks who are less likely to come to our center.

Financial Assistance eligibility is determined for clients whose previous year’s IRS Tax Form 1040 demonstrates their household income falls below HUD’s Standard income limits. For those who do not file tax forms, bank statements are acceptable. In July 2014, SA introduced a standard award of \$20/session for new awardees. More than 50% of current awardees are grandfathered in at their existing rate, with an award ranging from \$25 - \$45 per day.

The Financial Assistance Fund fulfills the needs of the Marin community of older adults living with dementia by providing more than 6,000 hours of care and caregiver respite annually. “Informal” or “family” caregiving is the backbone of our long-term care strategy. “Family caregivers carry out difficult, demanding and socially useful roles, with minimal training and little preparation. They are less likely to have jobs and they and their families often experience high out-of-pocket costs. . . . Undervaluing of caregivers impacts negatively on the quality of care.” (Alzheimer’s Disease International, “World Alzheimer’s Report 2013”, p 7)

B. Project Rationale: Why is this project needed? Will it assist an especially needy or underserved group?

Marin’s growing aging population is well documented in the Marin County Health and Human Services *Area Agency on Aging Planning 2012-2016*. Marin’s older adult population accounts for more than a quarter of the total

population, totaling 65,591 people. **The largest proportional increase is in persons age 85+, of whom nearly 50% live with dementia.**

Alzheimer's disease (AD) and dementia are dreaded diseases associated with aging, engendering fear and anxiety, resulting in prejudice, discrimination and social stigmatization of the person diagnosed and those caring for him/her. AD and dementia bring a progressive loss of the ability to function socially in normatively acceptable ways. The loss of initiative renders people with dementia unable to reach out; fear causes friends and colleagues to withdraw. Withdrawal from established networks results in isolation, depression, anxiety, and premature institutionalization. For those affected, everyday tasks and activities become arduous or impossible. Persons with dementia need a safe haven where they can connect with others and participate in cognitively appropriate activities.

Research suggests that socialization may positively influence cognition, general functioning and overall quality of life. Socialization plays an important role in the management of dementia. (Ruthirakuhan, M, et al, "Use of Physical and Intellectual Activities and Socialization in the Management of Cognitive Decline of Aging and in Dementia: A Review," *Journal of Aging Research*, Volume 2012 (2012), Article ID 384875, <http://dx.doi.org/10.1155/2012/384875>.)

There is no cure for dementia. Today, quality care and caregiver respite are the best solutions we can offer. Non-pharmacologic interventions are an essential part of any management plan, especially for geriatric populations in whom the harmful effects of polypharmacy are a major concern. (Ruthirakuhan, M, et al, "Use of Physical and Intellectual Activities and Socialization in the Management of Cognitive Decline of Aging and in Dementia: A Review," *Journal of Aging Research*, Volume 2012 (2012), Article ID 384875, <http://dx.doi.org/10.1155/2012/384875>.) Senior Access is the only care program of its kind in Marin, meeting critical needs of Marin's population of caregivers and older adults with dementia who would otherwise have few options for respite and care.

The SA Financial Assistance Fund helps low-income families access quality services, serving a population that is increasingly marginalized and underserved, families who are struggling with the challenges of both limited income and a demanding progressive disease. In the last fiscal year, the CDBG funds were exhausted by December 2013.

Due to the high cost of assisted living and skilled nursing facilities, SA Financial Assistance Fund often provides the only affordable care option for low-income older adults with dementia in its service areas. Almost half of our family caregivers **get no other respite than the time their loved one spends at SA.** Some families must limit the days of care they receive at SA for financial reasons. SA is adjusting to the increased needs of families by intensifying fundraising efforts for financial assistance and respite funds.

The Marin County Division of Aging and Adult Services recognizes the lack of long-term care options for residents whose income falls below HUD's low-income criteria and in its 2006 report cautioned that other than Senior Access, "the only [other] option for these [low-income] individuals may be placement in another county outside of the Bay Area region." Sadly, this is still true in 2014. SA's local, affordable day-time care option is crucial for low income caregivers, whose respite needs are particularly acute because daytime hours are required to maintain employment or care for other family members.

Stigma is a significant factor for the person with dementia and his/her caregiver. In early stages, people with dementia may be embarrassed by their forgetfulness; during later stages, their behavior (poor self-control, incontinence, disheveled appearance) may suggest neglect. People with dementia may attempt to avoid social interactions and in doing so, isolate their family members as well.

According to the Alzheimer's Disease International, World Alzheimer's Report 2012, "Despite the efforts launched against other forms of stigmatization, ageism continues to represent the most socially condoned and institutionalized form of prejudice in the world today." (Nelson, Todd D (ed). Ageism: Stereotyping and Prejudice

Against Older Persons. Cambridge, MA : MIT Press, 2004. ISBN: 978-0-262-64057-2.)

The goals are to reach people with dementia so that they can engage, participate and maintain dignity wherever they live and provide critical support and respite for caregivers.

C. Equal Opportunity: For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)

In an effort to analyze which groups are less likely to access Senior Access services, we compared our member demographics (FY 13-14) to Marin County's:

Group	Marin County	Senior Access (FY 13-14)
African American	2.8%	1%
Asian	6.0%	5%
Caucasian	86.2%	90%
Hispanic/Latino	15.7%	2%
Native American	1.1%	2%

It is clear that African Americans, Asians and Latinos are under-represented in our membership. These groups of people are less likely to join a group that has not already been vetted by their community and religious leaders.

Unfortunately, the dream of “if you build it, they will come” is illusion. It doesn't matter how great your program may be, if you aren't integrated into a community at every level, the program is doomed to failure. This takes time, care, commitment, and will.

Senior Access has been working toward integrating into these communities for several years by meeting with community leaders, offering “pop-up” art and educational workshops, exhibiting artwork in community centers and buildings, broadening the diversity of our advisory council, and expanding programs in ways that will reach out to these groups of people.

SA is making progress in our efforts to reach out and become a resource to diverse communities. This year, SA offered free workshops focused on aging and aging with memory loss at Marguerite C. Johnson Senior Center and in multiple languages at senior centers and clubs in San Rafael and Novato. We are working on bringing our popular Brain Fitness workshops to new communities by training multi-lingual workshop leaders. These workshops will bring SA to a broader range of underserved groups of older adults.

SA is exploring new opportunities through the popular Excursion Clubs. Excursions are experienced as a more “appealing” program by both members and caregivers, serving to integrate people with dementia into the community experience. We have been tethered to our center in San Rafael by licensing restrictions. We are working with our State licensing agency to assure compliance with our Adult Day Care license while expanding services throughout the county. Allowing SA to meet members in their own communities is much more welcoming and comfortable for everyone.

Current and future approaches to broadening our member base are:

PROGRAM:

- Offering the Latino community increased access to care via a bi-lingual Program Director and Program Assistants (on-going);

- The 2015 Arts Initiative is recruiting caregivers and artists to train in our internationally recognized art education program using an “art as communication” technique. SA will target recruitment efforts toward family and professional caregivers from each service area (planned for 2015);
- “Pop-up” art projects have proven to be a great way to reach out to new communities of folks who would otherwise not use SA services. Throughout the year, SA will be offering “pop-up” art workshops for older adults at their own senior centers and clubs (occurred in 2014 and planned for 2015);
- SA staff and leadership are actively seeking more funds to support the implementation of new program strategies to increase the participation of people of color and for non-English speakers. Transportation, location and cost limit people’s ability to participate in a quality daytime club that provides both personal assistance (toileting, ambulating, feeding) and innovative programming for folks with memory loss. A new approach to the Excursion Clubs could remove transportation and location barriers. We are working with our State licensing agency to meet members in the community, outside of our center, but still use the umbrella of our license to care for folks with dementia. The program will require more financial assistance and support from the community (planned for 2015); and
- SA will engage in surveys and one-on-one meetings with community leaders to ascertain the need in each community and solicit ideas for solutions to the barriers that keep people from accessing our services (planned for 2015).

COMMUNITY EDUCATION

- In 2014, SA developed a multi-lingual outreach educational workshop with 3 sister agencies. We offered five workshops on Aging and Aging with Memory Loss to the African American community and to non-English speaking community groups in Marin City, Novato and San Rafael. These free workshops go a long way in strengthening our reputation and vetting our staff and services (occurred in 2014 and planned for 2015);
- In response to the extremely popular Brain Fitness workshops, SA has convened a group of community leaders from the African American and non-English speaking communities to train workshop leaders. Brain Fitness workshops are a non-threatening, fun way to socialize and identify community members in need of support for memory loss (in progress);
- Another popular community service is the highly regarded Memory Screening. In partnership with the Alzheimer’s Foundation of America, Senior Access offered more than 60 hours of free memory screenings at senior centers. We are actively seeking health and geriatric professionals to conduct culturally appropriate screenings in English, Spanish, Russian and Vietnamese (in progress);
- The goal of the Brain Fitness and Memory Screening workshops is to conduct workshops in each service area. These workshops will strengthen the SA “brand” and direct people in need of day services to SA; and
- SA offers a free Caregiver Support Program monthly. It is a safe place for caregivers to share information and personal experiences.

SENIOR ACCESS AND THE LGBT COMMUNITY

- Having participated in cultural competency training with Spectrum LGBT Center, SA worked closely with Spectrum to develop welcoming language as part of our information and enrollment packets and in-house signage. Program and administrative staff receive training in LGBT sensitivity (trainings occur annually).

ADVISORY COUNCIL:

- The SA Advisory Council provides critical thought leadership on dementia in the county and has expanded and broadened its membership to include leadership and representation from the African American, Latino and Vietnamese and LGBT communities. This places these leaders directly in contact with the elected officials, key government employees and non- and for- profit agencies who are on the Council (see attached list of Advisory Council members), expanding the reach of their leadership role

and lending them a greater voice in policies and planning in the dementia community (the Advisory Council meets annually).

SENIOR ACCESS BOARD OF DIRECTORS

- The SA Board of Directors is engaged in strategic planning, focusing on remaining financially stable and growing the SA brand over the next 3 - 5 years. One of the identified goals is to expand the board to include a more diverse group of members, including African American and multi lingual members who represent non-English speaking people from every service area, in addition to caregivers and people living with memory loss. The new board members will have a direct effect on the communities we are trying to reach (planned for 2015).

SENIOR ACCESS AND THE COMMUNITY

- Being a good community partner – partnering with Marin County’s Division of Aging and Adult Services, for-profit agencies and nonprofit organizations for community education and awareness (on-going);
- SA is the prime mover in a program that trains first responders (EMTs, paramedics and firefighters) to quickly assess an emerging crisis in the home of older adults and give them a method of direct intervention. SA has applied for a Community Benefit Service Grant from the county to expand this program. It will affect older adults in every service area and connect older adults in need with community services (began in 2014 with the San Rafael Fire Department; in planning for expansion during 2015); and
- SA staff field hundreds of calls and visits every year, referring people to appropriate community resources.

If this project involves housing, how will it affirmatively further fair housing?

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people.

D. Accessibility: *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*

All of our participants live with physical and cognitive disabilities: dementia and chronic health conditions. Many members require personal assistance with activities of daily living (ambulating, toileting and eating). All members require supervision.

SA facilities are specifically furnished to accommodate the needs of our population and staff are trained in dementia care. Licensed by the California Department of Social Services, SA programs and facilities are ADA compliant. Excursion clubs contract with Whistlestop para-transit services to provide wheelchair accessible vehicles and drivers who are trained in transporting people with disabilities and memory loss.

E. Green Building: *For new construction or rehabilitation, what will you do to incorporate “green building” principles?*

- For further information, please call Roy Bateman (473-6698). It’s ok to call with any questions at any time.
- The current year’s application form must be used.
- Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.
- **Applications sent by fax or e-mail will not be accepted.**

- This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence. If you'd like to download this form as a Microsoft Word document, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.
- Don't forget to fill out the Organization Profile form.
- All County publications are available in alternative formats (Braille, large print, or CD) upon request. Requests for accommodations may be made by calling (415) 473-4381 (Voice), 473-3232 (TDD/TTY), or by e-mail at disabilityaccess@marincounty.org. This form and other County documents are available in alternative formats upon request.

DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

k:\cycle\2015 cycle\applications fy15\2015-16 edbg application form.doc

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: Senior Access

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	44%
Low income people	3%
People above the low income limits	53%

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
Ethnic/Racial Demographics						
Asian-American/Pacific Islander	5%	0%	0%	6%	0%	4%
African-American/Black	1%	4%	0%	6%	0%	9%
Caucasian/White	90%	88%	75%	69%	100%	82%
Native American	2%	0%	0%	0%	0%	0%
Mixed Heritage	2%	8%	25%	19%	0%	5%
Unknown/other	0%	0%	0%	0%	0%	0%
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						
Of Latino/ Hispanic Origin	4%	12%	50%	19%	0%	5%
NOT of Latino/ Hispanic Origin	96%	88%	50%	81%	100%	95%
TOTAL %	100%	100%	100%	100%	100%	100%
Age						
0-5 years old	0%	0%	0%	0%	0%	0%
6-17	0%	0%	0%	0%	0%	0%
18-24	0%	0%	0%	33%	0%	0%
25-59	1%	1%	50%	47%	60%	56%
60 +	99%	99%	50%	20%	40%	44%
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						
Female	66%	75%	75%	75%	40%	72%
Male	34%	25%	25%	25%	60%	28%
Total %	100%	100%	100%	100%	100%	100%
Disabled %	100%	100%	0%	94%	0%	6%

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board: Club members all live significant	60% of board members are also caregivers

Organization Profile – 2015-16 Data Collection Pilot

cognitive decline and are not able to participate as leadership volunteers; caregivers are represented on the governing board	
On Advisory Committee:	9% are or have been clients of Senior Access

Income Limits

Household Size	Very Low Income Limit (≈50% of Median Income)	Low Income Limit (≈80% of Median Income)
1	38,750	62,050
2	44,300	70,900
3	49,850	79,750
4	55,350	88,600
5	59,800	95,700
6	64,250	102,800

**MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16**

NS-8

1. **Project Name:** **Wise Choices for Girls** 2. **Total Amount Requested:** **\$20,000**

3. **Project Sponsor:**
Marin City Community Services District
630 Drake Avenue
Marin City, CA 94965

Non-housing proposals must specify the amount requested from each planning area.

Contact Person:
Alexis Wise

Title: Founder/Director

Mailing Address:
Marin City Community Services District
630 Drake Avenue
Marin City, CA 94965

Telephone: 415-410-6715 **Ext.N/A**
Fax: 415-332-9225
E-mail:lwisem@aol.com

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$
Novato Planning Area	\$3,000
Richardson Bay Planning Area	\$16,000
San Rafael Planning Area	\$1,000
Upper Ross Valley Planning Area	\$
West Marin Planning Area	\$

Website (optional):

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. **Project Location: (Precise street address).** For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

The Hannah Gallery, Gateway Shopping Center
170 Donahue Street
Marin City, CA 94965

5. **Project Description:**

Wise Choices for Girls is a Marin County girls group. We serve at risk low income youth from the ages of 12-18. Our goal is to inspire girls to strive for academic excellence by developing good daily study habits, we develop social and cultural competence and we serve our communities. We develop leaders through training, and collaboration with existing programs in the Marin County area, such as: Marin City Recreation Center, Marin City Community Services District, Hanna project, Youth Leadership Institute, Bridge the Gap, Performing Stars, Woman's Commission Teen Girls Conference, which Wise Girls has served for 3 years, and continues to serve as ambassadors. Wise Girls are members of Marin County Youth Commission for past 2 years, and continue to serve.

JAMC 10/15/15

6. **Total Project Cost:** (Include all costs for this particular project regardless of source.)\$20,000

7. **Project Budget for CDBG Funds:**

Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.

Wise girls will utilize the CDBG funds on; **Equipment** laptops \$500 each total, \$6,500.00 This will eliminate disparities in the digital age, and keep them current with ever changing technology as it regards to research, and academic enrichment in the pursuit of higher learning. **Uniforms** -T-shirts, aprons, Jackets. \$2,500 **Nutrition** - \$4,000 **Transportation**- Gas, bridge toll, travel expenses. \$4,000 **Program supplies**- Flyers, brochures, event items, table cloths, napkins, utensils, juicers, serving tools, decorations, pencils/pens, notebooks, paper clips, printer, printer ink, printer paper, lap top, projector.\$3,000.

8. **Other Sources of Funds for this Project:** Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?

<u>Source</u>	<u>Use</u>	<u>Amount</u>	<u>Date You Applied</u>	<u>Are Funds Committed?</u>	<u>Date Funds Were Committed</u>	<u>When Available</u>
Jack Kystal	General Funds	\$1,000	04/2014	Projected 2015	04/2014	Projected 2015
Ray Menester Marin County Supervisor	Training General Funds	\$1,000 \$1,000	02/2014 2014	Yes Yes	02/2014 06/2014	02/2014 09/2014
Fund Raiser	General Funds	\$1,700	N/A	N/A	N/A	03/2014
Dr. Valerie Pitts	General Funds	\$ 100	N/A	N/A	N/A	03/2014

9. **Project Implementation:**

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

Alexis Wise, Project Founder will oversee and is responsible for this project. It will be implemented by offering nutritional meals. We offer demonstrations on preparing healthy meals. We sponsor speaker series involving professional women that share their experiences on how to be successful. We have training courses on manners and etiquette, and leadership skills. We will implement self-esteem/self-confidence courses, and we expose them to the world outside of Marin City. Classes will be offered for leadership training. The older teenage girls will also work with the younger girls as role models. Training sessions will be taught after school held at the Hannah Gallery and the Marin City Services District Teens facility. Wise Girls meet 2 to 3 times per week, and some weekends, for 3 hours beginning with critical dialogue. Wise Girls We also collaborate with existing programs throughout Marin County, such as: Marin City Recreation Center, 10,000 Degrees, Women's Commission Marin Teen Girls Conference, Hanna Project, Bridge the Gap, Youth Leadership Institute.

10. **Need for the Project:**

There is an extreme need for this project. At risk girls, often come from dysfunctional/and or disadvantage lifestyles. Through positive, productive interaction with mentoring programs, tutoring programs, health programs, nutritional information and general assistance, we guide these girls to make "Wise Choices" in their everyday lives.

A. **Need Group**

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

12-20 disadvantaged, underserved/low income girls ages 12-18 of Marin County will benefit from this project. The income level of these girls families are well below \$30,000 per year, with household sizes more than 3-4 per household, some far below this level. The majority of these girls live in Marin City; however we are also serving low income areas of Mill Valley, Novato, and the Canal areas. We document eligibility by having parents complete a registration form including their income. There are girls that could be reached with additional funding.

Household Size	Income Limit
1	\$62,050
2	70,900
3	79,750
4	88,600
5	95,700
6	102,800
7	109,900
8	117,000

B. Project Rationale: *Why is this project needed? Will it assist an especially needy or underserved group?*

It is documented that girls are most vulnerable, starting at age 12-18. There is a need for mentoring these at risk/high risk girls to make wise choices. The need is prevalent due to the circumstances surrounding their everyday struggles. Wise Choices offers these girls a safe place to share and overcome the emotional disparities due to economic/social hardships. Wise girls are encouraged to join academic tutoring classes, leadership training, health workshops, and etiquette classes. Wise Choices ensures safe travels to/from each of these programs throughout Marin County. Yes, it will assist the needy and or underserved.

C. Equal Opportunity: *For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)*

Our Affirmative Marketing Strategies target all girls from all backgrounds, primarily the girls we serve are African American, however; we include Caucasian, Hispanic, Asian, Indian, and Middle Eastern youth. We realize it is difficult to bridge the gap between different cultural, social economic groups. At Wise Choices for Girls we bridge that gap, by providing a very safe and neutral zone for the girls to meet: The Gateway Shopping Mall in Marin City, CA. Hanna Gallery. Parents from each of these groups have visited and are very comfortable with the location. We include all 5 high school districts at Wise Choices for Girls. All girls and their families are comfortable with our overall structure of the program, including guest speaker series, drug and alcohol awareness, self-esteem building, health education/body awareness, career training, and sex trafficking awareness.

If this project involves housing, how will it affirmatively further fair housing?N/A

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people.

D. Accessibility: *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*

Wise Choices for Girls do not discriminate. Our programs are offered to everyone/anyone who wants the opportunity. We encourage and welcome all girls to join with different cultural backgrounds, economic differences, and with physical/mental/learning disabilities.

E. Green Building: *For new construction or rehabilitation, what will you do to incorporate "green building" principles?*

- For further information, please call Roy Bateman (473-6698). It's ok to call with any questions at any time.
- The current year's application form must be used.
- Completed applications may be mailed or hand-delivered to the Federal Grants Division, Marin County Community Development Agency, 3501 Civic Center Drive, Room 308, San Rafael, CA 94903-4157.
-
-
-
-
- **Applications sent by fax or e-mail will not be accepted.**

- This form can be expanded to accommodate additional text, but we encourage you to be brief. You may attach supplementary material. If you need more space for several questions, please answer all questions in sequence. If you'd like to download this form as a Microsoft Word document, visit: www.marincounty.org/cdbg; open the Newest Information Panel and scroll to the heading Application Information and Workshops.
- Don't forget to fill out the Organization Profile form.
- All County publications are available in alternative formats (Braille, large print, or CD) upon request. Requests for accommodations may be made by calling (415) 473-4381 (Voice), 473-3232 (TDD/TTY), or by e-mail at disabilityaccess@marincounty.org. This form and other County documents are available in alternative formats upon request.

DEADLINE: APPLICATIONS MUST BE RECEIVED BY FRIDAY, DECEMBER 5, 2014, AT 5 P.M.

Remember that we don't accept e-mailed or faxed applications.

JAM10190

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: Wise Choices for Girls

My organization does not gather demographic data. My organization does not wish to share demographic data.

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	90%
Low income people	10%
People above the low income limits	0%

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
Ethnic/Racial Demographics						
Asian-American/Pacific Islander	2	2	0	0	0	0
African-American/Black	12	13	3	3	0	5
Caucasian/White	0	0	3	0	2	1
Native American	0	0	0	0	0	0
Mixed Heritage	3	3	0	0	0	0
Unknown/other	0	0	0	0	0	0
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						
Of Latino/ Hispanic Origin	3	3	1	0	0	0
NOT of Latino/ Hispanic Origin						
TOTAL %	100%	100%	100%	100%	100%	100%
Age						
0-5 years old						
6-17	18	18	0	0	0	0
18-24	2	2	0	0	0	0
25-59						
60 +						
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						
Female	20	20	0	0	0	5
Male	0	0	2	0	0	2
Total %	100%	100%	100%	100%	100%	100%
Disabled %						

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	0
On Advisory Committee	2

Organization Profile – 2015-16 Data Collection Pilot

Income Limits

Household Size	Very Low Income Limit (≈50% of Median Income)	Low Income Limit (≈80% of Median Income)
1	38,750	62,050
2	44,300	70,900
3	49,850	79,750
4	55,350	88,600
5	59,800	95,700
6	64,250	102,800

**MARIN COUNTY COMMUNITY DEVELOPMENT
BLOCK GRANT (CDBG) PROPOSAL
2015-16**

NS-9

1. Project Name: Y Bike
YMCA -

3. Project Sponsor: Novato Y
Contact Person: Dana McCune
Title: Senior Director of Youth Development

Mailing Address: 3 Hamilton Landing, Suite 140,
Novato, CA 94949

Telephone: 415.446.2140
Fax: 415.492.9703
E-mail: dmccune@ymcasf.org

2. Total Amount Requested: \$10,000

Non-housing proposals must specify the amount requested from each planning area.

For non-housing projects only:	Funds Requested
Lower Ross Valley Planning Area	\$
Novato Planning Area	\$10,000
Richardson Bay Planning Area	\$
San Rafael Planning Area	\$
Upper Ross Valley Planning Area	\$
West Marin Planning Area	\$

Website (optional): www.ymcasf.org/novato

All future announcements will be sent to you by e-mail, unless you indicate otherwise: Please send by mail.

The County of Marin is committed to encouraging new grant applicants. Please call us at 473-6698 for advice about our requirements and what to emphasize in your application, and consider attending one of our informational workshops. HUD requires that all CDBG projects engage in affirmative marketing. That means analyzing which demographic groups are least likely to apply and taking extra steps to market the program or project to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. The goals of affirmative marketing are to enhance neighborhood diversity and to support the County's commitment to affirmatively furthering fair housing and equal opportunity.

The concept of fair housing encompasses both federal and state laws that prohibit housing discrimination. The federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including pregnancy and the presence of children), and disability. In addition, state law prohibits housing discrimination on the basis of age, ancestry, marital status, medical condition, source of income, sexual orientation, gender expression, gender identity, and many other categories.

4. Project Location: (Precise street address). For housing and capital projects, include the year the building was constructed and the Assessor's Parcel Number.

Novato Y, 3 Hamilton Landing, Ste. 140, Novato, CA 94949

5. Project Description: According to the Profile of Marin and the US Census Bureau, the Hamilton area of Novato has the lowest life expectancy of any other community in Marin County.*

In response, the Marin & Novato Y partnered with local non-profits and schools to provide a free after school wellness program that engages low income middle and high school youth most at risk for obesity, diabetes and other preventable chronic diseases. This program offers challenging and adaptive physical activities, nutrition education, mentoring and health coaching, disease prevention, peer leadership, in-service learning opportunities, Project-Based Learning and life skills education. Targeted outcomes for this program are focused on student engagement; an increase in consumption of healthy foods and beverages; an increase in physical activity; an increase in self-esteem, self-efficacy and resiliency and positive role modeling by peer leaders, parents and guardians.

In 2007, the YMCA of San Francisco partnered with the San Francisco Bicycle Coalition to develop our YBike Afterschool Bicycle Program curriculum. The curriculum is a comprehensive guide to leading afterschool programs for youth ages 10-15. The curriculum consists of 15 lessons, a safety pre-test & post-test, student skills checklist, and a student evaluation of the program. Examples of lessons include: Helmet Fitting, Bike Fit and Selection, Safety Checks and Blacktop Drills; Road Hazards and Intersection Simulation; Student Mapping Activity and Bike Ride; and Bike Ride to the Farmer's Market. Following a progressive curriculum, the program begins with bike basics and safety instruction. Between sessions 1-7, riders practice basic bike operation skills, and engage in team building activities. Between sessions 8-16, youth begin riding on the streets with a

ride around the block. As the youth become more confident, the group rides get longer and encounter more complex traffic situations. During the 16 weeks, youth have weekly lessons on nutritious eating and the environmental benefits of cycling.

The YBike Program offers students the chance to ride a bike, explore their neighborhood, and learn the skills needed to safely ride a bike on city streets. It also gives them a sense of independence, builds confidence and helps them connect to their community. The YBike program is teaching our youth valuable life skills on a daily basis - getting youth on bikes and helping them feel confident enough to use their bikes as a better transportation choice.

This year the Marin Branch adopted this program and is now implementing at Hamilton Meadow School.

* See addendum 1 for attached methodology for Census and Portrait of Marin life expectancy findings

Total Project Cost: (Include all costs for this particular project regardless of source.)

\$55,126**

**See addendum 2 for full project budget

7. Project Budget for CDBG Funds:

Budget **must** include an itemized estimate of how you would spend the CDBG amount you are requesting, as accurate and comprehensive as possible. For example, land or building acquisition costs, construction costs, remodeling costs, architectural and engineering fees, salaries, administrative expenses, etc. **For rehabilitation or construction projects, you must include a contractor's written bid or other equally reliable cost estimate, using Davis-Bacon wage rates if applicable.** If your project includes residential rehabilitation, describe your plans to comply with federal lead paint regulations.

Nutritious Snacks and Program Supplies \$ 10,000

8. Other Sources of Funds for this Project: Include amount, source, use, status, and timing of funds other than CDBG funds, if applicable. Have you applied for the other funds? Are the other funds **firmly committed** for this project?

Source	Use	Amount	Date you applied	Are Funds Committed?
CDBG	Healthy Snack and Supplies	\$10,000	Dec. 5, 2014	No
Spare the Air	Staffing, Bikes, Helments Tools, storage, transportation	\$54432	March 5, 2013	Yes

9. Project Implementation:

Who will be responsible for implementing the project? How will it be implemented and what is the proposed schedule for project implementation?

Dana McCune, Senior Director of Youth Development for the Marin & Novato Y, and Executive Directors at the partner agencies oversee the strategy, funding, results, and hiring, with a part-time project coordinator, reporting directly to Ms. Clapperton. The program coordinator ensures the day-to-day goals are being met for participants and is available for staff, participants and members, and engages school administration.

The initial program began in August '13 with Hamilton Middle School and Marin Oaks, Novato and San Marin High School students. The second program will begin in Winter '14 (February).

10. Need for the Project:

A. Need Group

What groups or individuals will benefit from the project? What income level will you serve? How will you document eligibility? CDBG recipients are required to provide documentation that the majority of the users have incomes at or below the CDBG income limits. The current upper income limits for CDBG beneficiaries are shown in the table below. Applicants for housing funds must describe how the project will ensure long-term affordability.

Household Size	Income Limit
1	\$59,100
2	67,550
3	76,000
4	84,400
5	91,200
6	97,950
7	104,700
8	111,450

Based on Community Needs Assessment funded by Marin Community Foundation, Healthy Marin Partnership and the Marin & Novato Y, the following information was found:

- According to A Portrait of Marin:
 - Diabetes in top 7 causes of death in Marin
 - 1 in 5 youth reported being overweight or obese
 - 35% of Latino 5th, 7th, and 9th graders in Marin are not a healthy weight.
- Hamilton is a mixed-income community and has the lowest life expectancy, at 75.2 years, life expectancy in Marin.

At Hamilton Meadow Park School, 35 % of students are English language learners and 57% are eligible for free or reduced lunch.

B. Project Rationale: *Why is this project needed? Will it assist an especially needy or underserved group?*

- There are no other programs or services in the area addressing these needs. This program is free, culturally appropriate, and provides transportation, which is also currently unavailable in the Hamilton community.
- Hamilton has one the highest rates of overweight and obesity, diabetes as well as self-reported poor health in the county.
- Hamilton has a pocket of both health and income disparity.
- Hamilton is one of the USDA-defined food deserts though a new supermarket has recently improved access to healthy foods
- People of lower socioeconomic status die at a higher rate than others from nearly every cause
 - Harmful effects of low social ranking on health start early (poor children have higher rates of injury, asthma, physical inactivity, and chronic conditions than do children from higher- status families) and accumulate through the course of one's life.
 - More difficult to secure healthy foods, access to safe places to exercise, safe housing, and quality health care are fewer. Second, people of lower socioeconomic status tend to have less information about health, are less likely to follow prescribed treatment plans, and have more health risk behaviors like smoking, all largely a consequence of their lower levels of educational attainment

C. Equal Opportunity: *For all projects, which demographic groups are least likely to apply, and what affirmative marketing steps do you plan to reach them? (Affirmative marketing means analyzing which demographic groups are least likely to apply and taking extra steps to market the program to those groups. One aspect of affirmative marketing is implementing strategies to make your program more welcoming and comfortable to the groups which are least likely to apply. Be sure to consider race, ethnicity, and disability, as well as other demographic factors, in your analysis.)*

Approximately 75% of the youth for our program to come from Hispanic/ Latino families in the Hamilton area and 100% are from the Hamilton School (now K-8). The Novato Y has a deep relationship with the principal, vice principal and Dean of Students at the school, and are currently running an after school Child Care program for K-5 on-site. The administration supports our program, by setting up small group meetings with their Latina Mother's Group and a SALA (an assembly for middle schoolers) to introduce the opportunity to students. Students are sent home with informational materials in English and Spanish. We offer two family nights each semester to entertain questions and concerns from parents of youth interested in the program.

We have a split interest from male and female youth, grades 6-8, and to make the environment comfortable, we employ both male and female staff and peer leaders from local High Schools, some of whom are bilingual.

The YMCA of San Francisco's mission is to builds strong kids, strong families and strong communities by enriching the lives of all people in spirit, mind and body and the Marin & Novato Y's vision is to invest its resources to ensure a future filled with positive change for the community by delivering life and community-changing experiences.

*** The Y is dedicated to diversity and inclusion, and has ensured it can serve all families in a culturally appropriate manner: marketing materials will be bilingual (English and Spanish); some of Novato Y's membership and wellness staff speak Spanish. The Y's partners deliver services and employ staff who represent and reflect the diversity of the community.

*** See addendum 3

If this project involves housing, how will it affirmatively further fair housing? N/A

If this project involves construction, discuss (1) your plans for recruiting women- and minority-owned firms to bid on the design and development of this project, and (2) your plans to provide employment opportunities to low-income people and businesses owned by low-income people. N/A

D. Accessibility: *What steps are you taking to make this project (and your overall program) accessible to people with physical and other disabilities?*

The Y is ADA compliant with its entrances, restrooms and wellness floor. Y staff is trained and experienced working with youth and adults with physical and developmental disabilities and special populations.

E. Green Building: *For new construction or rehabilitation, what will you do to incorporate "green building" principles? N/A*

Budget Report - 2014 - 2015 01 Unrestricted Fund
 YMCA of San Francisco - Marin and Novato Branches
 07/01/2014 - 06/30/2015

Fund: 01 Unrestricted Fund 01
Branch: Marin 76, Hamilton 78
Major Account: All
PCS Code: All

Account Group	Account Group Name	Annual
01	Contributions	306,500
03	Special Events	70,000
10	Grants	65,000
11	Membership Dues	4,505,423
13	Program Fees	2,792,597
14	Member Services	14,440
15	Investment Returns	17,000
16	Miscellaneous	15,716
Total	Revenue	7,786,676
21	Salaries and Wages	3,081,608
22	Employee Benefits	469,070
23	Payroll Taxes	348,075
24	Professional Services	126,542
25	Supplies	379,687
26	Telecommunications	57,713
27	Postage	6,569
28	Occupancy	929,329
29	Equipment	151,151
31	Printing, Promotions	36,306
32	Travel, Transportation	77,931
33	Conferences, Training	35,495
34	Campaign Expenses	21,200
35	Membership Dues	57,563
37	Financing Costs	139,043
38	Insurance	56,460
39	Miscellaneous	41,247
48	Intra-Y Allocations	1,168,631
53	Current Budgeted Assets	53,815
54	Intercompany accounts	507,103
Total	Expense	7,744,538
Change in Net Assets		42,138

Forecast By Month - 2014 - 2015 01 Unrestricted Fund Forecast

YMCA of San Francisco

Fund: 01 Unrestricted Fund 01

Branch: All

Department: Other Grant/ Contracts 46

Major Account: All

PCS Code: Y-Bike -GY GY0000

Account Number	Account Name	2014 - 2015		Variance
		Budget	Actual/Forecast	
01-76-46-0122-GY0000	Grant subsidy-intrabranch	0	54,432	54,432
Total Revenue				
01-76-46-2110-GY0000	Professional Full Time	0	7,000	-7,000
01-76-46-2120-GY0000	Program Full Time	0	28,638	-28,638
01-76-46-2125-GY0000	Program Part Time	0	5,000	-5,000
01-76-46-2210-GY0000	Medical/ Dental	0	5,544	-5,544
01-76-46-2310-GY0000	FICA & Medicare	0	2,190	-2,190
01-76-46-2320-GY0000	Unemployment	0	314	-314
01-76-46-2330-GY0000	Worker's Comp	0	713	-713
01-76-46-2540-GY0000	Program Supplies	0	7,032	-7,032
01-76-46-2550-GY0000	Food & Beverage	0	5,000	-5,000
01-76-46-2930-GY0000	Equip. Purchases under \$5000	0	2,500	-2,500
01-76-46-3980-GY0000	Recruitment & Relocation	0	501	-501
Total Expense				
		0	64,432	-64,432
Change in Net Assets				
		0	-10,000	-10,000

Addendum 1

5.

The methodologies for the Portrait of Marin and Census are as follows:

Life expectancy at birth was calculated by the County of Marin Department of Health and Human Services. And from services using Marin County Vital Statistics Mortality and data from EDRS for 2005–2010 and population data from the U.S. Census Bureau.

Population counts by age group for the life expectancy estimates for census tracts are from Census 2000. County-level life expectancy estimates were calculated using AHDP estimates of population by age group based on population counts by age group from Census 2000 and 2010. Life expectancy for the entire United States is from Lewis and Burd-Sharps (2010). Life expectancy for the state of California is from BurdSharps and Lewis (2011).

They used a formula that looked at Health, Education and Income to determine the Human Development Index:

Once these indices have been calculated, the Human Development

Index is obtained by taking the average of the three indices (health/education/income) pages 66 & 67 of the report:
HD Index = $\frac{7.36 + 8.17 + 7.73}{3} = 7.75$

The American Human Development Index measures the distribution of well-being and opportunity in three basic dimensions: health, access to knowledge, and living standards. All data used to calculate the Index come from official U.S. or Marin County government sources.

The commonalities for shorter life expectancy were poverty, which impacts access to health care and healthy lifestyle habits and lower levels of education.

Further indicators:

In September 2012, the Marin Pediatric Nutrition Surveillance System reported that almost one-in-three low-income children in Marin are overweight or obese by age five. The number increases to over 34% for low-income Hispanic children.
(www.marincounty.org/Main/~//media/Files/MarinGov/Board%20Actions/20120918BOSChildObesityReso.ashx)

Organization Profile – 2015-16 Data Collection Pilot

The County of Marin is interested in more deeply understanding the population demographics of those who staff, govern and/or utilize the services of Community Development Block Grant (CDBG) and HOME Program grantee and applicant organizations. More deeply understanding these demographics will address some of the topics highlighted in the 2011 Analysis of Impediments to Fair Housing in Marin.

The data gathered on this form will NOT determine an organization's likelihood to receive CDBG or HOME funding. If you do not collect or do not wish to share the demographic information requested, please check the appropriate box below. We hope you will be able to participate in this pilot project. If you have completed a similar organization profile form when applying for foundation grants in Marin, feel free to use the information collected for those forms if submitted within the last 12 months.

Name of Organization: Marin & Novato Y

My organization does not gather demographic data. My organization does not wish to share demographic data.

* Please see attached memorandum

Income of Level of Clients Your Org Serves %	(Please use the federal income guidelines on the reverse of this page.)
Very low income people	U/K
Low income people	U/K
People above the low income limits	U/K

Percentages (%)	Clients Your Organization Serves	Clients for this Project	Support Staff	Professional Staff	Board	Advisory Committee
Ethnic/Racial Demographics						N/A
Asian-American/Pacific Islander	2.2%					N/A
African-American/Black	.55%	10%				N/A
Caucasian/White	29%	60%	80%	90%	95%	N/A
Native American	0%					N/A
Mixed Heritage	U/K	30%	20%	10%		N/A
Unknown/other	64.38%				5%	N/A
TOTAL %	100%	100%	100%	100%	100%	100%
Latino/Hispanic Origin						
Of Latino/ Hispanic Origin	3.75%	80%	50%		5%	N/A
NOT of Latino/ Hispanic Origin	96.25%	20%	50%	100%	95%	N/A
TOTAL %	100%	100%	100%	100%	100%	100%
Age						N/A
0-5 years old	>1%					N/A
6-17	10%	90%	2%			N/A
18-24	1%	5%	6%			N/A
25-59	41%	5%	90%	100%	2%	N/A
60 +	47%		2%		98%	N/A
TOTAL %	100%	100%	100%	100%	100%	100%
Gender						
Female	53%	50%	75%	80%	24%	N/A
Male	47%	50%	25%	20%	76%	N/A
Total %	100%	100%	100%	100%	100%	100%
Disabled %	U/K	U/K	U/K	U/K	U/K	U/K

Organization Profile – 2015-16 Data Collection Pilot

Involvement of Clients Your Organization Serves	Percent of Board/Committee Members Who Are Clients
On Governing Board	75%
On Advisory Committee	N/A

Income Limits

Household Size	Very Low Income Limit (≈50% of Median Income)	Low Income Limit (≈80% of Median Income)
1	36,950	59,100
2	42,200	67,550
3	47,500	76,000
4	52,750	84,400
5	57,000	91,200
6	61,200	97,950

ORIGINAL

MEMORANDUM REGARDING ORGANIZATIONAL PROFILE: 2015-2016

The demographic data by ethnicity provided for the clients the Marin & Novato Y serves was derived from the Y's member and program management system. Members self-select, and have the option to select "Refuse to Disclose." The Marin & Novato Y started collecting this information in the 2012-13 fiscal year.

The YMCA of San Francisco does not require that branches collect this information from all clients and constituents.

We do not have enough information collected on income to adequately report on income; though we provide approximately 7-10% of our members financial assistance.

Addendum 3

10C

In the past, The Y usually attracts Caucasians, and with this program in direct partnership with Hamilton School we are focusing on outreach to Latino and African-American youth and families via bilingual and culturally appropriate marketing and information materials for the youth and families.