

TOWN OF CARRBORO AHSRF APPLICATION REVIEW SHEET

APPLICANT: REBUILDING TOGETHER OF THE TRIANGLE, INC.

PROJECT TYPE: Home Repair/Rehabilitation

TOWN AH GOALS ADDRESSED:

1.3 A2. Grants for critical home repairs, energy efficiency, up fits to accommodate changing mobility, etc. +opportunities to decrease utility payments.

FUNDING REQUESTED: \$9,200

PROJECT ADDRESS: 100 Weatherhill Point – Carrboro

PROJECT SUMMARY: This project will support aging-in-place, specifically by improving the accessibility of the bathroom for an elderly homeowner. The project involves a bathtub-to-shower conversion. The home was built in the 1990s.

POPULATION SERVED:

Income Group	Seniors age62+	Children	Disability Present	Asian	Black	Hisp./ Latinx	Mixed Race	Other	White
<30% of AMI	1		2		3				
31%-60% of AMI									
61-80% of AMI									
81-100% of AMI									
101-115% of AMI									
TOTAL					3				

ENVIRONMENTAL IMPACT:

The primary focus of the project is improving accessibility of the bathroom for an elderly homeowner. Wherever possible, RTT incorporates weatherization and energy efficiency improvements and universal design. They work closely with Central Piedmont Community Action and their weatherization program to maximize the benefit to homeowners, and they utilize funding from Orange County's climate action tax to support additional improvements in weatherization not covered by state weatherization program guidelines.

TOWN OF CARRBORO AHSRF APPLICATION REVIEW SHEET

FUNDING RECOMMENDATION:

- ☐ FULLY FUND
- ☐ PARTIALLY FUND (Can include suggested amount or %) _____
- ☐ DO NOT FUND

FUNDING APPLICATION

DATE:

Section 1: APPLICANT AND PROJECT OVERVIEW

A. Applicant Information

Applicant/Organization's Legal Name: _____

Primary Contact Person and Title: _____

Applicant/Organization's Physical Address: _____

Applicant/Organization's Mailing Address: _____

Telephone Number: _____

Email Address: _____

B. Project Information

Project Name: _____

Total Project Cost: _____

Total Amount of Funds Requested: _____

Please specify **which permitted use of funding is being requested** (as listed in Section 2: B.1.):

To the best of my knowledge all information and data in this application are true and current. The document has been duly authorized by the governing board of the applicant.

Signature: _____

Executive Director or other Authorized Signatory

Date

Section 2: PROJECT DESCRIPTION

Please provide a thorough description of the project (by answering the "who," "what," "when," and "where" questions about your project). **Do not assume the reader knows anything about the project.**

A. "Who"

1. Who is the target population to be served and how will their needs be addressed through this project? If this is a repair or rehabilitation project, please address how the beneficiary meets eligibility requirements and provide substantiation, such as a deed, homeowner insurance policy statement, etc.

2. Please indicate the income of the beneficiaries (households) to be served through the proposed project. Please see **Attachment A** for the current income limits for the Durham-Chapel Hill MSA.

Income Group (Area Median Income)	Number of Beneficiaries	% of Total Beneficiaries
<30% of AMI		
31%-60% of AMI		
61-80% of AMI		
81-100% of AMI		
101-115% of AMI		
TOTAL		

Income Group	Seniors age62+	Children	Disability Present	Asian	Black	Hisp./ Latinx	Mixed Race	Other	White
<30% of AMI									
31%-60% of AMI									
61-80% of AMI									
81-100% of AMI									
101-115% of AMI									
TOTAL									

3. **Project Staff.** Please provide names of staff, contractors, and/or volunteers that will be involved with the project. Describe their responsibilities with the project and track record in successful completion of similar projects in the past:

B. "What"

1. Type of Activity. Please check the category under which your project falls.

- ☐ Acquisition
- ☐ Pre-development costs
- ☐ Rental subsidy
- ☐ Ownership subsidy
- ☐ New construction for homeownership
- ☐ New construction for rental
- ☐ Rehabilitation for owner-occupied or rental (including urgent repairs - see *)
- ☐ Land banking
- ☐ Grant to land trust
- ☐ Foreclosure assistance
- ☐ Other (specify): _____

**Starred items requesting no more than \$5,000 or 15% of the existing fund, whichever is lower, do not have to provide performance measures and can apply outside of the funding cycles.*

2. Project Description. Please provide a general overview of your project, including what you are planning to produce, how the requested funds will be used and how you are planning to carry out the project. Include how your project meets the criteria of eligible uses.

C. "Where"

1. Project Location. Please be as specific as possible.

2. Project Size (if applicable). Please provide the size of development site: _____ acres

Please attach the following:

- ☐ Site map showing lot boundaries, locations of structure(s), and other site features
- ☐ General location map (at least ½ mile radius)

D. "When"

☐ Attach a **detailed** timetable showing when each work task will be completed (e.g., planning; obtaining financial commitments; design; environmental review; bidding; loan closing; key milestones in construction; marketing; final inspection; occupancy; etc.)

E. Project Details

If the questions below are not applicable or the requested information is not currently available, please insert N/A.

1. Property Acquisition.

- a. Has your agency acquired real property in order to carry out the project, or is property acquisition planned? _____

- b. Is the property currently occupied? If so, attach a description of your plan to relocate.
- c. Please attach an appraisal of the property.

2. Construction/Rehabilitation Detail.

- a. How many units will be newly constructed?
- b. How many units will be rehabilitated?
- c. What is the square footage of each unit?
- d. What is the number of bedrooms in each unit?
- e. What is the number of bathrooms in each unit?
- f. How many units will have full ADA accessibility?
- g. Is the proposed project located in Carrboro Town limits, ETJ, or transitional area?
- h. Please attach the following:
 - ☐ Floor plan(s)
 - ☐ Elevation(s)
 - ☐ List of Energy Efficiency measures included in the project (if applicable)
 - ☐ List of Universal Design principles included in the project (if applicable)

3. Design, Affordability, Marketing, and Supportive Services.

- a. Describe any methods to ensure long-term affordability of housing units, including subsidy recapture, equity sharing, deed restrictions, etc.:
- b. What are the proposed rents (including utility costs) or sales prices for completed units?
- c. Explain your agency's process for marketing to ensure an adequate pool of income-eligible renters to buyers:
- d. Describe the use of **energy efficient principles**, universal design, and/or materials with extended life span.
- e. What supportive services, if any, will be provided through this project?

Section 3: PERFORMANCE MEASUREMENTS

A. Goals and Objectives

Please complete the following chart with information about the project's goals and objectives.

Goal/Objective	Measurement
<i>Ex: Provide housing for low- to moderate-income households.</i>	<i>Ex: By 2020, build ten units that are affordable to households earning less than 80%AMI.</i>

B. Alignment with Town Goals and adopted affordable housing strategies.

Please explain how the proposed project aligns with the Town Council Goals and adopted affordable housing strategies.

Section 4: PROJECT BUDGET AND PRO-FORMA

A. Project Budget

☐ Attach a **detailed project budget** in Excel format showing all sources and uses of funds. Indicate which funds are committed or pending and include the % of committed funds toward this project. Attach funding commitment letters where available or copies of funding applications previously submitted.

☐ Has an appraisal been conducted? If so, please attach.

B. Terms of Project Funding

Please specify the type of funding request for which you are applying:

☐ Grant ☐ Loan

C. Pro-forma (for rental property only)

☐ If you are developing a property for rent, please attach a 20-year pro-forma showing estimated income, expenses, net operating income, debt service, and cash flow.

Section 5: ORGANIZATION DESCRIPTION

If you have already provided this information on a previous application in the current fiscal year, you do not need to provide this information again.

A. Organization

What is your organization's . . .

1. Mission statement?
2. Incorporation date (Month and Year)?
3. Estimated Total Agency Budget for this fiscal year? \$
4. Total number of agency staff (full time equivalents):

B. Organization Track Record and Community Support

Please describe your organization's experience and ability to carry out the proposed project, including:

1. Evidence of coordination of this application with other organizations to complement and/or support the proposed project
2. Involvement of intended beneficiaries of the project in the planning process
3. Past achievements in carrying out similar projects and evidence of successful record of meeting proposed budgets and timetables
4. Collaborative relationships with other agencies
5. Plans to develop linkages with other programs and projects to coordinate activities so solutions are holistic and comprehensive
6. Any other features relating to organization capacity that you consider relevant, (i.e. property management experience, including accepting Section 8 Vouchers, etc.).

Section 6: DISCLOSURE OF POTENTIAL CONFLICTS OF INTEREST

Are any of the Board Members or employees of the agency which will be carrying out this project, or members of their immediate families, or their business associates:

a) Employees of or closely related to employees of the Town of Carrboro

YES ☐ NO ☐

b) Members of or closely related to members of the governing bodies of Carrboro?

YES ☐ NO ☐

c) Current beneficiaries of the project/program for which funds are requested?

YES ☐ NO ☐

d) Paid providers of goods or services to the program or having other financial interest in the program?

YES ☐ NO ☐

If you have answered YES to any question, please explain below. The existence of a potential conflict of interest does not necessarily make the project ineligible for funding, but the existence of an undisclosed conflict may result in the termination of any grant awarded.

Town of Carrboro Grant Request - Budget and Funding Matrix

Homeowner	Service Address	Project Budget	Town of Carrboro Request	Other RTT Match
	100 Weatherhill Pointe	\$ 9,200.00	\$ 9,200.00	\$ -
	TOTALS	\$ 9,200.00	\$ 9,200.00	\$ -

|

RTT Work Scope

Owner: Orange - 100 Weatherhill Pointe Carborro NC 27510

Project Notes: 1871 sq. ft. conventional 2 story house built on a crawl space in 1993. 6/12 Shingle, 200 Amp DEC service, Dominion Gas, OWASA utilities. Good for Carrboro AHF and DEC HHF.

Area: 3 Interior

Title	Trade	Decription	Notes	Cost Per Unit	Quantity	Unit	Total Cost
Drywall - Patch, Small	Drywall	Clean out and expand hole to allow the insertion of a 1/2" gypsum backer board coated with construction adhesive. Screw through drywall face to secure. After adhesive is set, apply patching plaster to 1/ 4" of surface. Finish with compound, wet sand ready for paint. Prime and paint to match, including adjacent area to a corner or wall edge for consistency	Bathroom ceiling, stairwell	\$ 450.00	2	Each	\$ 900.00

Area: 6 Plumbing

Title	Trade	Description	Notes	Cost Per Unit	Quantity	Unit	Total Cost
Shower Conversion	Plumbing	Remove existing tub. Install a 5', 4 piece, fiberglass low curb shower unit. Include a seat and ADA compliant grab bars; drain and overflow; PVC waste; single lever shower diverter; shower rod; shower faucet and a hand-held shower head with a maximum 2.0 GPM flow rate. Install faucet controls toward the outside of the tub for easier access. Exterior wall sections behind the tub shower unit and any plumbing penetrations must be completely air-sealed prior to installation.	LH 30x60	\$ 5,500.00	1	Each	\$ 5,500.00
Plumbing General	Plumbing	Replace Shower valve in upstairs tub		\$ 850.00	1	Each	\$ 850.00

Area: 10 Generl Conditions

Title	Trade	Decription	Notes	Cost Per Unit	Quantity	Unit	Total Cost
Project Supervision and Management	General	Project Management and Supervision	\$500 project development fee + 20% of Construction Estimate	\$ 1,950.00	1	Each	\$ 1,950.00

TOTAL ESTIMATED PROJECT COST	\$ 9,200.00
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TOWN OF CARRBORO AHSRF APPLICATION SCORE SHEET

APPLICANT: EMPOWERMENT, INC.

PROJECT TYPE: Emergency Housing Assistance/Housing Stabilization/Foreclosure Prevention

AMOUNT REQUESTED: \$64,020

TOWN AH GOALS ADDRESSED:

1.3 Decrease barriers to first-time homeownership and homeownership retention, particularly among seniors

PROJECT ADDRESS: Brighton Square – 121 Westview Drive – Carrboro

PROJECT SUMMARY: The grant will assist 6 low-income households who own and live in their townhomes in Brighton Square, an affordable, but aging, townhome development, by providing financial counseling and stabilization funds so that they can retain homeownership. The units require new siding and roofing after years of deferred maintenance. To support these necessary repairs, the HOA issued a one-time fee of \$9,700 per unit, an unforeseen and significant burden for residents who are low-income and/or on a fixed income, and one which places them at risk of losing their homes due to foreclosure.

POPULATION SERVED:

Income Group	Seniors age 62+	Children	Disability Present	Asian	Black	Hisp./ Latinx	Mixed Race	Other	White
<30% of AMI	1		1						1
31%-60% of AMI									3
61-80% of AMI									2
81-100% of AMI									1
101-115% of AMI									
TOTAL									7

ENVIRONMENTAL IMPACT: Although repairs are being conducted on the units which will undoubtedly increase energy efficiency, this request is seeking support for housing stabilization and foreclosure prevention in an existing affordable home community.

TOWN OF CARRBORO AHSRF APPLICATION SCORE SHEET

FUNDING RECOMMENDATION:

- ☐ FULLY FUND
- ☐ PARTIALLY FUND (Can include suggested amount or %) _____
- ☐ DO NOT FUND

FUNDING APPLICATION

Date: March 31, 2023

Section 1: APPLICANT AND PROJECT OVERVIEW

A. Applicant Information

Applicant/Organization's Legal Name: EMPOWERment, INC.

Primary Contact Person and Title: Delores Bailey, Executive Director

Applicant/Organization's Physical Address: 109 N Graham Street, Suite 200, Chapel Hill, NC

Applicant/Organization's Mailing Address: 109 N Graham Street, Suite 200, Chapel Hill, NC

27516 Telephone Number: 919-967-8779

Email Address: empowermentincnc@gmail.com

B. Project Information

Project Name: Brighton Square Homeowner Retention Project

Total Project Cost: \$64,020

Total Amount of Funds Requested: \$64,020

Please specify which permitted use of funding is being requested (as listed in Section 2: B.1.):

Housing Stability

To the best of my knowledge all information and data in this application are true and current. The document has been duly authorized by the governing board of the applicant.

Signature: Delores Bailey

Executive Director or other Authorized Signatory

4/3/23
Date

Section 2: PROJECT DESCRIPTION

Please provide a thorough description of the project (by answering the “who,” “what,” “when,” and “where” questions about your project). **Do not assume the reader knows anything about the project.**

A. “Who”

1. Who is the target population to be served and how will their needs be addressed through this project? If this is a repair or rehabilitation project, please address how the beneficiary meets eligibility requirements and provide substantiation, such as a deed, homeowner insurance policy statement, etc.

This grant will assist 6 families currently living in Brighton Square community which is an aging townhome development in Carrboro built in 1984. These homeowners are unable to meet the financial requirement of paying a onetime HOA fee of \$9,500 for needed development repairs. They each meet all the grant requirements such as live in Carrboro, reside in their property, have an active insurance policy, unable to obtain a loan and meet the Area Median income requirement range in this grant. This information has been obtained and verified by the HUD Housing Counselors at EMPOWERment where the grant will be administered.

2. Please indicate the income of the beneficiaries (households) to be served through the proposed project. Please see **Attachment A** for the current income limits for the Durham-Chapel Hill MSA.

Income Group (Area Median Income)	Number of Beneficiaries	% of Total Beneficiaries
<30% of AMI	1	14
31%-60% of AMI	3	43
61-80% of AMI	2	29
81-100% of AMI	1	14
101-115% of AMI		
TOTAL	7	100

Income Group	Seniors age 62+	Children	Disability Present	Asian	Black	Hisp./ Latinx	Mixed Race	Other	White
<30% of AMI	1		1						1
31%-60% of AMI									3
61-80% of AMI									2
81-100% of AMI									1
101-115% of AMI									
TOTAL									7

3. **Project Staff.** Please provide names of staff, contractors, and/or volunteers that will be involved with the project. Describe their responsibilities with the project and track record in successful completion of similar projects in the past:

With various levels of experience, this project will be completed on schedule and according to the proposed budget. Our team consist of Ms. Delores Bailey, Executive Director, Sharron Reid, Lead HUD Housing Counselor and Mrs Valencia Thompson, HUD Housing Counselor/Property Manager/Project Administrator. Listed are their individual experiences.

Delores Bailey, Executive Director of EmPOWERment, Inc - Ms Bailey, under her leadership for the past 15 years, has increased the organization's rental inventory from 12 to 58 units including two manufactured homes. In addition, she has managed new construction projects (five new single-family homes) as well as major rental rehabilitation projects (more than twenty) throughout Orange County during her tenure as the Director. Ms. Bailey has a long history of working closely with town and county government departments to secure project funding as well as developing collaborations with various local agencies. In 2019, she led a successful fundraising campaign raising over \$100,000.00 for operational and seed money for the PEACH Apartment Project. Lastly, she is diligently working with foundations and local banks in preparation to launch a capital campaign. In addition, she partnered with the Orange County Housing and Community Department to oversee and administer the Emergency Housing Assistance listening sessions. Ms. Bailey was responsible for the overall management of the proposed project. During that time, she worked as the point of contact and acted as liaison between the Orange County. She will assume the same role for the Town of Carrboro and the Brighton Square HOA including negotiating the agreement terms, execute the contract, oversee the project and disburse the funds.

Sharron Reid, HUD Counselor - Ms Reid has over 20 years of experience in the area of housing counseling and held positions at Habitat for Humanity Orange County, Chatham County Housing Authority Brick Capital CDC as well as EMPOWERment. Therefore, she is well trained in pre-purchase and has extensive training in foreclosure prevention counseling, group instruction as well as individual counselling. Since the pandemic, Ms Reid has worked extensively with the Emergency Assistance Program serving families in need of financial assistance to remain housed. In addition, she has assisted families with completing application for the Homeowners Assistance program and worked with mortgage services as well as landlords throughout the process to keep them housed. Therefore, she will be responsible for meeting with homeowners, developing individual budgets, collecting pertinent information and providing on-going counseling services to families.

Valencia Thompson, HUD Counselor- Mrs Thompson has several years of experience in the housing industry and therefore she has a panoramic view of the different facets of housing and how it works. As a HUD Housing Counselor, she provides education as well as rental and pre-purchase counseling to families disabled as well as seniors and to families from all income brackets throughout NC. Therefore, she understands the unique situations a family may encounter, and have seen firsthand the stress that families face when struggling to pay their rent or when evictions or foreclosures are pending. Her training has helped her help individuals/families locate valuable resources to shelter in place while their financial situation stabilizes. As a Real Estate Broker, she has seen the increase in housing cost and watch hard working families have to defer their dream of homeownership despite the unjustified

increase in their rents. Mrs Thompson has been able to connect them to programs that offer down payment assistance to help bridge that gap. Lastly, her accounting and financing background has helped her understand money from the viewpoint of a consumer as well as from the prospective of an organization. Currently, Mrs Thompson has acted as Administrator of several grants, which includes the HUD grants. Therefore, she is well rounded in fulfilling the role as administrator for this project. She will maintain files, provide reports, and request funding.

B. "What"

1. Type of Activity. Please check the category under which your project falls.

- ☐ Acquisition
- ☐ Pre-development costs
- ☐ Rental subsidy
- ☐ Ownership subsidy
- ☐ New construction for homeownership
- ☐ New construction for rental
- ☐ Rehabilitation for owner-occupied or rental (including urgent repairs - see *)
- ☐ Land banking
- ☐ Grant to land trust
- ☐ Foreclosure assistance
- ☒ Other (specify): Foreclosure Prevention/Housing Stability

**Starred items requesting no more than \$5,000 or 15% of the existing fund, whichever is lower, do not have to provide performance measures and can apply outside of the funding cycles.*

2. Project Description. Please provide a general overview of your project, including what you are planning to produce, how the requested funds will be used and how you are planning to carry out the project. Include how your project meets the criteria of eligible uses.

C. "Where"

1. Project Location. Please be as specific as possible.

The location of the townhomes (121 Westview Dr (units #57,8,42,12,54, 56) Carrboro NC are within the Carrboro Town Limits.

2. Project Size (if applicable). Please provide the size of development site: N/A acres

Please attach the following:

- ☐ Site map showing lot boundaries, locations of structure(s), and other site features
- ☐ General location map (at least ½ mile radius)

D. "When"

☒ Attach a **detailed** timetable showing when each work task will be completed (e.g., planning; obtaining financial commitments; design; environmental review; bidding; loan closing; key milestones in construction; marketing; final inspection; occupancy; etc.)

See Attached

E. Project Details

If the questions below are not applicable or the requested information is not currently available, please insert N/A.

1. Property Acquisition.

- a. Has your agency acquired real property in order to carry out the project, or is property acquisition planned? N/A

- b. Is the property currently occupied? If so, attach a description of your plan to relocate.
- c. Please attach an appraisal of the property. N/A

2. Construction/Rehabilitation Detail.

- a. How many units will be newly constructed? N/A
- b. How many units will be rehabilitated? 6
- c. What is the square footage of each unit? (see Attached list)
- d. What is the number of bedrooms in each unit? 2
- e. What is the number of bathrooms in each unit? 2
- f. How many units will have full ADA accessibility? 0
- g. Is the proposed project located in Carrboro Town limits, ETJ, or transitional area?
All the homes are located at 121 Westview Dr within Carrboro Town Limits.
- h. Please attach the following: N/A
 - ☐ Floor plan(s)
 - ☐ Elevation(s)
 - ☐ List of Energy Efficiency measures included in the project (if applicable)
 - ☐ List of Universal Design principles included in the project (if applicable)

3. Design, Affordability, Marketing, and Supportive Services.

- a. Describe any methods to ensure long-term affordability of housing units, including subsidy recapture, equity sharing, deed restrictions, etc.:

As first-time homeowners these 6 families bought into the Brighton Square development when both the interest rates were low and their HOA dues were manageable. Ultimately, they all hoped to age in place in their affordable homes. However, recently each homeowner received notice that in addition to their regular HOA dues a special maintenance fee of \$9,700 would be assessed to each unit. This fee will be used to address the much-needed repairs to their aging units. Obtaining a loan with the current interest rates now at almost 7% would be unaffordable for the majority of these homeowners and impossible for 2 of them. Comparable to their mortgage payments ranging from \$530.00 to \$900.00, a 2 bedroom, 1 bath rental unit in the same area starts at \$1281.00 but can be as much as \$1,500.00 a month. Potential rental payments at these amounts would financially bankrupt these families. Therefore, we see the use of these funds to cover their HOA fees as the only solution to stabilizing their housing in Carrboro, keeping them housed and thus preventing homelessness. In addition, these funds for new siding will increase the energy efficiency within the units which will ultimately extend the life of the home. Also, the new HOA management will be executed a new plan to address long term repair cost to all the units within the development. Therefore, an unmanageable lump sum amount will not be requested from homeowners again.

- b. What are the proposed rents (including utility costs) or sales prices for completed units?

N/A

- c. Explain your agency's process for marketing to ensure an adequate pool of income-eligible renters to buyers:

N/A

- d. Describe the use of **energy efficient principles**, universal design, and/or materials with extended life span.

N/A

- e. What supportive services, if any, will be provided through this project?

EMPOWERment has provided services to the community for almost 30 years where it is strategically located within a traditionally African American neighborhood. Since inception, we have been committed to serving this community. Through the years, the residents have learned to trust us to offer guidance and leadership in various capacities including housing counseling. Our housing counseling services range from educating families on how to obtain a home (pre-purchase counseling) to the prevention of losing their home (foreclosure prevention counseling). In the beginning, the housing industry was booming and low to moderately income families wanted the American dream, the dream to own their own home. Homebuyer's education workshops became a necessary route to homeownership as individuals and families prepared to purchase their first home. Collaborations with Housing programs such the Town of Chapel Hill Transitional Housing Program and Habitat for Humanity not only ensured that families had a great start at reaching their goal but also educated them on how to keep that home. Down Payment Assistance Programs offering up to \$20,000 and local as well as county grants made homes affordable for the families we served. A homebuyer's Education certificate as well as one-on-one counseling became a mandatory component to receiving those funds. During the same time, EMPOWERment began acquiring rental properties and the focus shifted to rental counseling. Therefore, the same services that were offered to the community were now offered to our tenants, which ensured that they had access to workshops, budgeting and prepurchase counseling. Since the COVID-19 crisis began in 2020, evictions have been exacerbated, causing many people to lose stable housing. To address the issue, EMPOWERment expanded its housing counseling program to include eviction stabilization counseling where many individuals and families were offered the opportunity to receive counseling as well as connect to resources such the HOPE Program, Emergency Housing Assistance Program and local organizations to remain housed. So, we are very familiar with all facets of housing and through the years, we have hosted community meetings, stood alongside disenfranchised communities and provided a space in our building for small business owners. Therefore, on-going housing counseling services in any of this area will be provided to each family unit throughout this project and beyond. We are committed to keeping individuals/ families housed.

Section 3: PERFORMANCE MEASUREMENTS

A. Goals and Objectives

Please complete the following chart with information about the project's goals and objectives.

Goal/Objective	Measurement
<i>Ex: Provide housing for low- to moderate-income households.</i>	<i>Ex: By 2020, build ten units that are affordable to households earning less than 80%AMI.</i>
Provide 6 income eligible homeowners the necessary financial assistance to meet the need of paying the one-time special assessment fee of \$9,700	By 2024, 6 townhomes at 121 Westview Street will be repaired/renovated with Special Revenue Funds. Thus, stabilizing these household by preventing foreclosure and avoiding potential homelessness.

B. Alignment with Town Goals and adopted affordable housing strategies.

Please explain how the proposed project aligns with the Town Council Goals and adopted affordable housing strategies.

The project supports housing stabilization for low-income homeowners at risk of losing their homes if they cannot pay a one-time homeowner's association maintenance fee of \$9700. The fee will be used to pay for critical repairs to assist 6 homeowners (1 senior) and help them remain in their homes. Therefore, this project aligns with Goal 1.3 *Decrease barriers to first-time homeownership and homeownership retention, particularly among seniors.* The fees that are being requested support Goal 1.3 A2 which states *grants for critical home repairs, energy efficiency, up fits to accommodate changing mobility, etc. and opportunities to decrease utility payments.*

Section 4: PROJECT BUDGET AND PRO-FORMA

A. Project Budget

☒ Attach a **detailed project budget** in Excel format showing all sources and uses of funds. Indicate which funds are committed or pending and include the % of committed funds toward this project. Attach funding commitment letters where available or copies of funding applications previously submitted.

☐ Has an appraisal been conducted? If so, please attach.

B. Terms of Project Funding

Please specify the type of funding request for which you are applying:

☒ Grant ☐ Loan

C. Pro-forma (for rental property only)

N/A

☐ If you are developing a property for rent, please attach a 20-year pro-forma showing estimated income, expenses, net operating income, debt service, and cash flow.

Section 5: ORGANIZATION DESCRIPTION

If you have already provided this information on a previous application in the current fiscal year, you do not need to provide this information again.

A. Organization

What is your organization's . . .

1. Mission statement?

EMPOWERment's mission is to empower individuals and communities to achieve their destiny through community organizing, affordable housing, and grassroots economic development.

2. Incorporation date (Month and Year)? 03/1996
3. Estimated Total Agency Budget for this fiscal year? \$ 1,200,000.00
4. Total number of agency staff (full time equivalents): 5

B. Organization Track Record and Community Support

Please describe your organization's experience and ability to carry out the proposed project, including:

1. Evidence of coordination of this application with other organizations to complement and/or support the proposed project

Because an unforeseeable assessment of \$9,700 at Brighton Square Homeowner Association put several homeowners in an emergency financial situation, families potentially were at risk of losing their home. Time was of the essence, since the HOA mandated that all homeowners pay this one-time special assessment fee to address deteriorating siding by May 30, 2023. As a result, a member of their management team consulted with a local lender, and they suggested that the management reach out to identify potential community resources. In August 2022, EMPOWERment was approached to assist in brainstorming a solution that had arisen within this aging community. Due to the severity of the issue, Ms Bailey, EMPOWERment's Executive Director reached out to the Town of Carrboro to inquire about any possible funding options for these few families unable to pay this assessment. The Special Revenue Funds were identified as a potential option for these families. Because of the urgency of this matter and since these funds must be passed through an organization, EMPOWERment volunteered to advocate for these desperate homeowners. After that initial meeting, EMPOWERment's staff began facilitating meetings on a regular basis with Town Staff and the Homeowner Association detailing the process of working with homeowners and establishing a manageable timeline to submit the Special Revenue Fund application.

2. Involvement of intended beneficiaries of the project in the planning process

By letter, the homeowners were notified of the partnership and families were connected to EMPOWERment and then self-select if they wanted to move forward to apply for funding. One-on-one counseling appointments were set up with each of the homeowners on the application where they had the opportunity to ask questions, develop a budget and then provide documentation to move forward to apply for funding. The homeowners

met with counselors on a regular basis to update information as needed. Letters, emails and phone calls are ways counselors continue to communicate with the homeowners to update them on the progress of the application and the expected timeline.

3. Past achievements in carrying out similar projects and evidence of successful record of meeting proposed budgets and timetables

Around June 2021, Empowerment was approached by Orange County Department of Housing to administer a countywide survey regarding their Emergency Housing Assistance Fund. The purpose of the partnership was to collect quantitative data by way of feedback on how the program ranked while assisting families during the housing crisis that developed as a direct result of the pandemic. EMPOWERment assumed the administrative role, coordinated the sessions, hired translators, prepared mailers, advertised the sessions, collected the data, facilitated the sessions and prepared the final report by the established deadline. The budget was met according to the agreement.

4. Collaborative relationships with other agencies

EMPOWERment collaborates with multiple community partners such as The Marian Cheek Jackson Center, Interfaith Counsel, Orange County Department of Housing and Community, Town of Carrboro, Families and Communities Rising and the Empowerment Fund.

5. Plans to develop linkages with other programs and projects to coordinate activities so solutions are holistic and comprehensive

Homeowners listed in this grant will be referred to the Homeowners Assistance Program and to the Homestead Exemption program (tax issues), if needed.

6. Any other features relating to organization capacity that you consider relevant, (i.e. property management experience, including accepting Section 8 Vouchers, etc.).

At EMPOWERment, we offered specialized counseling services which will be available to the homeowners beyond this project. EMPOWERment counselors will also be able to connect family with outside resources as well. We collaborate with a variety of community partners to pair families with services.

Section 6: DISCLOSURE OF POTENTIAL CONFLICTS OF INTEREST

Are any of the Board Members or employees of the agency which will be carrying out this project, or members of their immediate families, or their business associates:

a) Employees of or closely related to employees of the Town of Carrboro

YES ☐ NO ☒

b) Members of or closely related to members of the governing bodies of Carrboro?

YES ☐ NO ☒

c) Current beneficiaries of the project/program for which funds are requested?

YES ☐ NO ☒

d) Paid providers of goods or services to the program or having other financial interest in the program?

YES ☐ NO ☒

If you have answered YES to any question, **please explain below**. The existence of a potential conflict of interest does not necessarily make the project ineligible for funding, but the existence of an **undisclosed** conflict may result in the termination of any grant awarded.

	A	B
1	PROJECT Budget/Development Cost	
2	Brighten Square Townhomes	
3	121 Westview Dr, Carrboro, NC	
4	PROJECT DEVELOPMENT SOURCES AND USES	
5		
6		
7	SOURCES OF FUNDS	
8		
9		-
10		
11		
12		
13		
14		
15		
16	TOTAL Committed Funding	-
17		
18	Other Sources	
19	Carrbror Affordable Housing Reserve Fund	58,200
20		
21		
22		
23	Total	58,200
24		
25	Total Sources	58,200
26		
27	Expenses	COST TO
28		PROJECT
29		-
30		-
31	TOTAL IMPROVED LAND	-
32		
33	Special Assessment Fee Unit 8	9,700
34	Special Assessment Fee Unit 12	9,700
35	Special Assessment Fee Unit 21	9,700
36	Special Assessment Fee Unit 42	9,700
37	Special Assessment Fee Unit 54	9,700
38	Special Assessment Fee Unit 57	9,700
39	TOTAL CONSTRUCTION COSTS	58,200
40		-
41		-
42		-
43		-
44		-
45		-
46		-
47		-
48		-
49	TOTAL SOFT COSTS	-
50	EMPOWERment Admin Fee	3,720
51	Counseling Fees	2,100
52		-
53		-
54		-
55	TOTAL FEES, RESERVES/ESCROWS	5,820
56		
57	TOTAL DEVELOPMENT COSTS	64,020



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Aaylah Lee
Imani Rankins

VOLUNTEERS

Jalen Nwachukwu

Brighton Square Homeowners Retention Project Timeline/Timetable

7/16/2022 Initial meeting with EMPOWERment and Town of Carrboro to discuss partnership.

8/17/2023 Staff introduced to the opportunity to serve Brighton Square homeowners.

8/26/2022 Meeting with HOA Representative, Karla Rosenberg, Anne Marie Vanaman, Delores Bailey, Valencia Thompson and Sharron Reid to discuss partnership, roles and timelines.

9/20/2022 HOA Annual Meeting

10/26/2022 Partnership Meeting

11/11/2022 Zoom meeting with HOA representative, Ms Blanka Aguero

11/14/2023 Spoke with Ms Marsha Beck, HOA President to explain processes and timelines

11/15/2022 HOA Annual Meeting (project details included on the agenda)

12/31/2022 Completion of applicant's assessments

1/17/2023 Sent updated letter to homeowners (applicants)

1/26/2023 Introduction by ZOOM to the new HOA President, Ms Lara Handler

2/01/2023 Met with homeowner for collection of data and verification of eligibility of applicants for grant purposes

3/25/2023 Complete grant for submission

4/01/2023 Submit grant for review to the Town of Carrboro

4/06/2023 Provide letter to applicants reiterating approval/disapproval timeline

4/19/2023 Application presented to Carrboro Affordable Housing Advisory Commission

4/25/2023 Project presented to Town Council for approval

5/01/2023 Disbursement of funds to EMPOWERment

5/15/2023 Disburse funds to Homeowners Association management

5/29/2023 Funds credited to applicant's Brighton Square HOA accounts

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