

TIPS AND TECHNIQUES

Overview

This section will provide you with a recommended procedure and tips and techniques to guide you in making your vision a reality. Additionally, we will review some common errors and recommended solutions.

Recommended Procedure

Organize Your Efforts

Right from the start, orchestrate the efforts of your entire organization. Set up a big "strategy chart" listing all of the exhibits. Use the chart to distribute the workload, coordinate your efforts, and track progress.

Get Vital Exhibits FAST!

You will need to get documents from other organizations and a variety of government agencies. Be sure to get these vital exhibits prepared as soon as possible.

Write Crisply

Write crisply. Try to be brief. HUD does not simply award funds to the heaviest and thickest applications!

Showcase Your Strengths

Showcase your organization's strengths. Do not simply assume that HUD knows all about you. Do not bury your best pieces of information deep down in the tenth paragraph, either. Instead, use opening "summary statements" to highlight your organization and the best features of your proposed project.

Use the Evaluation Criteria

As you build your application, keep HUD's evaluation criteria in mind. Remember, HUD uses the criteria as a common yardstick to measure all the applications. So use the criteria as a compass when you write. You will find the selection criteria in your application package.

Prepare a Well-Organized Application

Prepare a complete, accurate, and well-organized document. The required index and tabs help HUD evaluators find information faster. Legibility helps, too.

Double-Check for Completeness and Accuracy!

But most importantly, make sure that every required exhibit is included with accurate information. Check and double check that every single document has the appropriate dates and necessary signatures.

Get a fresh pair of eyes to check the exhibits carefully and thoroughly. Go over your application with a fine-tooth comb because HUD's evaluators

will examine it with a fine-tooth comb.

Show Tax-Exempt Status

Common error

Not showing evidence of tax-exempt status is an error often made by churches. Some automatically assume that churches are tax-exempt. They do not understand why HUD needs a piece of paper that says they are tax exempt.

Solution

HUD must have proof of the tax-exempt status. You know that the sponsoring organization is a church. But HUD must have the evidence that the organization is in fact tax-exempt and non-profit. This proof is in the form of an IRS tax exemption ruling letter for your congregation ... or for your denomination with your congregation listed on it.

Suppose HUD did not require proof. Then anybody could pretend to be a church or non-profit organization. The requirement protects you. In this way, only legitimate organizations can get proof of their status.

HUD loses too many good applications from churches and other organizations because they fail to include proof of tax-exempt status.

Sign All Documents

Common error

Some organizations either do not sign (or improperly sign) the documents. Improper signatures include a consultant signing for the sponsoring organization.

Recommended Solution

Check and double-check all of the documents. Be sure your organization has signed and dated each document in the appropriate area. Your signature tells HUD that you are committed to this project on a long-term basis. Remember, members of your development team - architects, consultants, lawyers - may NOT sign documents on your behalf. Only the sponsor can sign the documents!

Consider a Co-sponsor

Common error

Occasionally, sponsors are concerned about having the qualifications to meet a specific part of the application. They wonder about having enough start-up money, experience, or the management capacity to run the project on a long-term basis.

Recommended Solution

Organizations can strengthen their applications by finding a co-sponsor that has deeper financial resources, or more relevant management experience. An organization whose

strengths dovetail with yours.

But, remember, a co-sponsor also must provide all of the required exhibits.

Establish the Need

Common error

Applications for supportive housing for persons with disabilities have always had to establish the need for housing. In the past elderly housing applicants have not. Now all applicants must do so.

Recommended Solution

To establish the need for housing, organizations will need letters and referrals from local government agencies and civic and community groups. Also include letters from other organizations that may have a special perspective on the populations you are trying to help. These may include nursing homes, hospitals, clinics, institutions, and other service providers.

The most important evidence of need usually comes from the data in official, state-sponsored surveys. Letters and referrals give HUD a subjective picture of the need. But the surveys give more solid and objective evidence. HUD wants to fund projects that will best serve the needs of their communities.

Explain Site Requirements

Common error

This is an area that often creates misunderstandings. Applicants wonder: What are the site requirements? Do we have to own the site? The topic of site requirements seems confusing.

Recommended Solution

Here is a brief description to help you understand. Refer to the NOFA for more detailed information.

In general terms, the site requirements show that your organization already has a good site or has made adequate arrangements to get one. There are two different methods of providing that evidence.

First, there is Evidence of Site Control. If you are sponsoring a project for elderly people, this is the **ONLY** method you can use. If your project is for people with disabilities, you can use this method **OR** the Identification of a Site method.

Evidence of Site Control means you have the site. You may already own it or you may have an "option agreement" to buy or lease it. An

option simply means the owner and you have both agreed that you will get the property if you win the award.

The second method, *Identification of a Site*, only applies to sponsors of a project for persons with disabilities. Here the organization may describe a recommended site. To do this the organization must describe both how and why the site was identified and what must be done to acquire it.

In both methods, you will need:

- Documents from other organizations and government agencies
- Zoning approvals
- Realty option agreements.

It is important to start gathering this information as soon as possible.

Meet The Deadline

Common error

Missing the deadline occasionally occurs. This is devastating. Applications that are not in on time are **automatically disqualified**.

Sometimes people ask if there is some way they can get an extension.

Recommended Solution

We are sorry, but the deadline is firm. There are NO extensions and no exceptions to it. Although this may seem rigid, it is rigid for an important reason: Fairness to all applicants.

Because the funds are awarded through competitive evaluation, the starting time and the finishing time must be the same for everyone. It is not easy, but it is fair.

Expect No Extensions

Common error

Some people make the error of thinking of the 14-day deficiency response time as an extension.

Recommended Solution

Under certain specific circumstances, organizations are requested to supply documents in a two-week period after the deadline. But that 14 calendar-day period is NOT an extension of the deadline. It is NOT an opportunity to complete, change, or repair the application.

If a document was inadvertently left out of your application, you may send it in. If you sent the wrong document by mistake, you may send the correct document to replace it. But these documents must have been prepared before the deadline. The following examples illustrate this point.

The first example is if there is a collation error. Suppose an exhibit has most of the required pieces, but the Articles of Incorporation were inadvertently dropped out when the document was assembled. Under the deficiency period, you can submit the Articles of Incorporation in the 14-day period. But here is a key point: The Articles of Incorporation must have been completed, signed, and dated before the deadline.

Another example is if you submitted all of the required financial information, but accidentally submitted last year's audit report. No problem: You can submit it in the 14-day period. But here is the key point: The audit must have been completed before the deadline date.

In summary, the 14-day period lets you supply documents inadvertently left out of the application. It lets you replace an inadvertently wrong document with the right document. But, in every case, the documents you send in must have been complete and correct before the deadline date.

Summary

The best solution is to get everything right in the first place. Go over every detail in every exhibit carefully. Make sure your application is **COMPLETE** and **CORRECT** - and get it in **ON-TIME**.

RESOURCES

HUD Resources

There are many resources from HUD to help guide you step-by-step through all the details of submitting an application for a fund reservation. These include the:

- Program Handbooks
- Notice of Fund Availability
- Application package
- HUD-sponsored workshops
- Technical assistance materials, including this application syllabus, the accompanying videotape, and sample applications showing what each exhibit looks like.

*HUD Office
Location Chart
and Map*

You can also call your local Field Office to discuss questions with the MultiFamily Housing Representative. The chart and map in the index[Appendix D] gives you location information about HUD offices around the nation.

Outside Resources

Consider discussing any questions you have with previous sponsors who have successfully developed supportive housing. They know the process first-hand! Other helpful resources are state agencies.

**from: *Complete, Correct, and On-Time: An Application Syllabus for
FY 1991 Section 202 and Section 811 Housing***