



Request for Applications

DC Office of Planning Live Near Your Work Pilot Program

**First Round Responses Due June 17, 2011
Second Round Responses Due October 7, 2011**

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Section I: Funding Opportunity Description

A. Background

The District of Columbia Office of Planning (OP) is responsible for guiding development of the District of Columbia, including the preservation and revitalization of our distinctive neighborhoods, by informing decisions, advancing strategic goals, encouraging the highest quality development outcomes, and engaging all communities.

OP seeks to partner with up to three employers in a Live Near Your Work (LNYW) pilot program to encourage employees to purchase homes that are close to their place of employment. Living closer to the place of employment offers many benefits to not only the employee, but the employer and the region as well. Employees spend less time and money commuting, DC employers benefit from potentially better on time and work performance and reduced parking expenditures, the city benefits from revitalized neighborhoods and an expanded tax base, and the region benefits from reduced traffic congestion and air pollution.

B. Program Description

In partnership with selected employers located in the District of Columbia, the LNYW pilot program will provide matching homeownership grants for down-payment and closing cost assistance to individual employees. DC will match employer contributions (up to \$6,000 per participating employee) to attract and retain DC residents, with the primary purpose of encouraging employees to live close to their place of employment or transit. The goal of the LNYW pilot program is to provide grants for a minimum of 30 and up to approximately 60 employees that work in DC to help them purchase a home in the District.

The LNYW pilot program has the following components:

- DC will match contributions made by the employer (\$3,000 to \$6,000 per employee) in the form of a grant towards assisting an employee's purchase of a home close to transit or place of employment.
- The pilot is open to households of all incomes.
- Contributions from employers must be in the form of a grant or a 0% deferred loan that is repayable at the time of payoff, refinance, or upon the sale or transfer of the house.

Applicants are encouraged to include additional details of a program that will meet the needs of their employees as part of their application.

C. Program Benefits

The purpose of LNYW is to deliver significant benefits to DC-based employers and employees, as well as to the city and region as a whole. LNYW is designed to provide:

1. **Employee Benefits:** Approximately 54% of workers in the Washington Metropolitan Region drive more than 30 minutes to work, but employees who live within 1.5 miles or less of their job can walk to work in less than 30 minutes or drive in less than 5 minutes. This can save the employee more than \$3,000 per year in transportation costs. If the house location is also near Metro or in a pedestrian-friendly neighborhood, the savings can more than double to \$7,000 per year. Unfortunately, most mortgage products do not recognize the savings in transportation costs when calculating how much a household can afford. The LNYW pilot program strives to close the affordability gap and provide an incentive for employees to locate near their place of employment and/or transit.

2. **Employer Benefits:** Employers benefit in several ways when employees can live close to work. A study conducted by the Center for Housing Policy found that employees who participated in the Aurora Health Care Employer-Assisted Housing program in Milwaukee received higher performance evaluations and had lower rates of turnover. The potential benefits also include improved day-to-day on-time attendance, greater probability of attendance in adverse or emergency conditions, reduced need for employer parking and potential health benefits to employees who are able to walk or bike to work. An employer-assisted housing program, such as LNYW, can also be a useful recruitment tool, particularly in areas where housing costs are perceived as high.
3. **Local and Regional Benefits:** Neighborhoods, local governments and the region all benefit when employees live closer to work. LNYW provides neighborhoods a stable base of homeowners and an expanded tax base from new DC residents. Focused efforts can help catalyze investment to improve neighborhood quality and safety. Local governments and the region benefit from reduced wear and tear on streets, reduced traffic congestion, improved air quality and lower carbon emissions.

D. Purpose of Request for Applications (RFA)

The purpose of this RFA is to solicit applications from DC employers interested in providing down payment and closing cost assistance to their employees as an incentive to live close to work. The selected applicant(s)/partner(s) will manage a LNYW program by:

1. Marketing the program to their employees;
2. Providing grants or 0% deferred interest loans of at least \$3,000 per employee, which the District will match up to \$6,000 per employee depending on the house location;
3. Providing/contracting for HUD-certified pre-purchase homebuyer education for all participating employees;
4. Collecting employee applications, consent forms, program metrics, and executed closing documents; and
5. Accounting for all grant funds provided by the District and the employer itself.

E. Matching Grant Details

The District will provide matching grants between \$3,000 and \$6,000 to employees of the selected partner(s) who purchase a home closer to their place of employment than where they were previously living (to be verified by OP). The District will match:

\$3,000 per employee for homes purchased in the District of Columbia that are:

- Within ½ mile of a Metro station;
- Within ¼ mile of a high-quality¹ bus corridor (See attached Map 1).

Up to \$6,000 per employee for homes purchased in the District of Columbia that are:

- Within 2 miles of place of employment.

¹ “High-quality” bus corridors were identified by OP based on total ridership, frequency of service, frequency of stops, and number of bus routes.

Section II: Award Information

A. Award Amount

The District has budgeted a total of \$200,000 of grant money for the LNYW pilot program. Partnering employers shall have up to one year from date of the execution of the contractual agreement to use initial allotments of up to \$60,000 and may request extensions from the District of up to 6 months at a time with cause. Employers can apply for and receive additional grant dollars based on performance and availability of the funds. Awards will be made through this competitive application process, and OP will select up to three DC employers to implement a matching grant program to incentivize employees to purchase homes close to their place of work and/or transit.

B. Reporting Requirements

The LNYW pilot program will evaluate the interest, costs and benefits of the program for the purpose of potentially expanding LNYW. Data collection on the recipients, their home locations, commute distances and similar data are important to this goal. OP and the selected employer(s) will finalize the appropriate metrics for evaluation and reporting of the program's success. Employers are required to submit an evaluation/reporting plan as a part of their application. Evaluation/reporting will be reviewed by the selection panel and awarded points according to the criterion outlined in Section V. The selected employer(s) will track LNYW participants and metrics that pertain to the program's objectives and report to OP every quarter. Quarterly reports will be used in mutual agreement with the employer to potentially adjust the program and/or improve marketing and other program components. Required metrics include:

- # of employees that obtained homebuyer counseling
- # of employees that purchased a home and received a LNYW pilot program grant
- Household size and income of participating employee awardees
- Sales prices of homes purchased (as specified in closing documents)
- Car ownership level (before AND after home purchase)
- Home address (before AND after home purchase)
- Commute time, mode, and distance (before AND after home purchase)

Other desirable metrics, while not required, may be developed in cooperation with employers as part of the participation agreement process. For example, these may include:

- Use of transit subsidies, if provided (before AND after home purchase)
- Rates of absenteeism among participating and non-participating employees (before AND after home purchase)

All household information will be collected for program evaluation only and will be kept strictly confidential. Selected employers will need to ensure that participating employees' informed consent explicitly addresses access to this information.

C. Terms and Conditions

- OP reserves the right to accept or deny any or all employer applications if OP determines it is in the best interest of the District and the LNYW program to do so. OP shall notify the applicant if it rejects that applicant's proposal. OP reserves the right to suspend or terminate an outstanding

RFA. OP reserves the right to issue addenda and/or amendments subsequent to the issuance of the RFA, or to rescind the RFA at any time.

- OP shall not be liable for any costs incurred in the preparation of applications or other materials in response to the RFA. Applicant agrees that all costs incurred in developing the application are the applicant's sole responsibility.
- If there are any conflicts between the terms and conditions of the RFA and any applicable federal or local law or regulations, or any ambiguity related hereto, then the provisions of the applicable law or regulation shall control and it shall be the responsibility of the applicant to ensure compliance.
- OP reserves the right to review and approve all materials developed by selected employers for the LNYW pilot program.

Section III: Eligibility Information

A. Eligible Applicants

The purpose of this RFA is to solicit applications from employers interested in creating and participating in the LNYW pilot program. Eligible applicants are employers that:

- Are located in the District of Columbia;
- Commit to funding a minimum of ten eligible employees (within one year) homeownership grants or 0% deferred loans of at least \$3,000 per employee;
- Will market the LNYW pilot program to existing and potential employees;
- Will provide/contract for HUD-certified homebuyer education to all program participants;
- Will provide OP with executed closing documents from each participating employee's house purchase;
- Will assist in evaluating the pilot program's performance and success;
- Will track each grant recipient for five years to ensure that the recipient maintains the home as his or her primary residence during that time period.

Major universities, hospitals and other large employers located in DC are encouraged to apply. This program may be particularly attractive to institutions planning facility expansions or struggling with transportation demand management. Other District employers are eligible to apply for the LNYW pilot program grant, as long as they can demonstrate the ability to attract participation of at least 10 employees², administer the program and demonstrate financial capacity to fund and manage the matching grants provided by the District.

B. Funding Restrictions

The grant funds provided by the District can only be used as a matching homeownership grant that is delivered directly to the homebuyer for down payment or closing costs. Only one grant may be used per eligible address, and one grant per employee.

The grant funds provided by the District may NOT be used for:

² As evidenced by total employment, strength of marketing plan, and/or grant size per participating employee.

- Administrative overhead or staff fees;
- Homebuyer counseling;
- Program marketing;
- Any other uses other than as a direct homeownership grant to the employee.

LNYW home purchases must be the primary residence of the homebuyer for a period of five years from the date of settlement or the homebuyer will be required to repay all or a portion of the grant. Final rights and responsibilities of participating employers and employees will be detailed in the participation agreement entered into between OP and each selected employer.

Section IV: Application and Submission Information

A. Application Package

Beginning Friday, April 29, 2011, interested employers can obtain an application package by:

1. Downloading from the OP website, planning.dc.gov, or the [District Grants Clearinghouse](#); OR
2. Visiting OP at 1100 4th Street, SW, Suite E650, Washington, DC 20024.

B. Pre-Application Session

OP will host a pre-application question and answer session with interested employers on **May 24, 2011, at 2pm**. The meeting will take place at 1100 4th Street SW, Suite E650, in the Large Conference Room. Attendance is optional and will have no bearing on the selection process.

C. Contact Information

For further information contact Art Rodgers, Senior Housing Planner, art.rodgers@dc.gov, or Kimberly Driggins, Associate Director for Citywide Planning, kimberly.driggins@dc.gov, by email or at telephone number 202-442-7600.

D. Application Forms and Content:

Submitted applications should be typed in a 12-point font and have all pages numbered and labeled with the applicant name. All sections should be tabbed and include the section title. The applications shall include the following:

- i. See attachments A-C for application forms. Each application form is required.
 - Attachment A - Live Near Your Work Application Form
 - Attachment B - Live Near Your Work Program Narrative (See Section V for details)
 - Attachment C - Project Budget
- ii. Resumes of up to three key staff who will be administering the program.
- iii. Financial statements including the Executive Summary of the most recent year end annual report and the most recent completed audited financial statement.
- iv. Certificates of Good Standing from the District of Columbia Office of Tax and Revenue (OTR) and the Department of Consumer and Regulatory Affairs (DCRA)
- v. Signed Statement of Certification.

The applicant may include supplemental application appendices to be used as supporting documentation. Appendices may not total more than ten (10) additional pages. Supplemental application appendices may include, for example:

- Additional staff resumes;
- Commitment letter from homebuyer counseling provider;
- Documentation of similar program previously undertaken by employer.

E. Submission Dates and Location

Applications for consideration in the first round of selection are due June 17, 2011, by 4:45 PM. Applications received after this deadline will be considered in the second round of selection, with an October 7, 2011 deadline, if three partners are not selected in the first round. Interested applicants are encouraged to apply by the first round deadline, as all funds may be allotted in this round. Four (4) copies, one original and three (3) copies, of the proposal are to be submitted in a sealed envelope or package conspicuously marked “Application in Response to Live Near Your Work RFA”. Electronic applications will not be accepted. Applications must be mailed or delivered to:

Kimberly Driggins
 DC Office of Planning
 1100 4th Street, SW, Suite E650
 Washington, DC 20024

Section V: Application Review Information

A. Minimum Standards and Competitive Evaluation Criteria

To be awarded funding, employer applicants must meet the eligibility thresholds outlined in Part 1 below. Applicants will then be assigned points based on the competitive evaluation criteria in Part 2.

Part 1: Minimum Eligibility Requirements

<p>Staff Plan: The proposal identifies organizational staff with the skills and experience to implement the LNYW pilot program. This may include any partner institutions identified to provide homebuyer education and/or other services.</p>
<p>Board/Leadership: The proposal demonstrates that the applicant’s board/leadership:</p> <ul style="list-style-type: none"> • Supports the implementation of the LNYW pilot program • Has allocated sufficient funding for the matching grants and administration • Is committed to marketing the incentive to all employees
<p>Management: The proposal must include a management plan that:</p> <ul style="list-style-type: none"> • Evidences the financial stability of the organization • Describes organizational systems already in place that could help to manage LNYW pilot program • Demonstrates the organization’s ability to carry out all tasks associated with the LNYW pilot program including, but not limited to: <ul style="list-style-type: none"> ○ Outreach and marketing of program to employees ○ Employee verification

- Application processing
- Homebuyer counseling
- Tracking and accounting for expenditure of funds³
- Reporting
- Commits to fund a minimum of 10 employees at \$3,000 or more each during the pilot program
- Describes employee selection mechanism⁴ and requirements of participating employees
- Provides a timeline or work plan schedule that outlines key milestone dates for implementing the LNYW pilot program

Part 2: Competitive Evaluation Criteria

Total number of employees the employer is committed to fund annually. Points will be awarded proportionally to highest proposed total.	40 Points
Maximum dollar commitment per employee. Points will be awarded proportionally to highest proposed total.	40 Points
2 mile radius around employer overlaps with District revitalization area(s) ⁵ (See attached Map 2).	20 Points
Total	100 Points

B. Review and Selection Process

First round applications received by June 17, 2011, will be reviewed by a panel of qualified, professional individuals who have an understanding of the program’s goals and objectives and an expertise in housing. OP and the review panel will determine whether the eligibility thresholds in Part 1 are met by the proposal and, if so, assign points based on the evaluation criteria in Part 2. For those applicants fulfilling the minimum requirements for funding, the panel will make recommendations for awards based on the highest scores in Part 2 of the proposal. The process of evaluating proposals may require respondents to make an oral presentation before the panel and/or require the panel to conduct a site visit. Those applications received after June 17, 2011, will be held for consideration in the second round. The second round will be held only if three partners are not chosen in the first round.

The recommendations of the review panel are advisory only and are not binding on OP. The final decision on awards rests solely with the Director of OP. OP reserves the right to select more than one employer applicant or none of the employer applicants. The Director is not required to award based on the applications received and reserves the right to re-advertise.

C. Anticipated Announcement and Award Dates

OP will announce the selected applicant(s) from each round no earlier than two weeks after the application deadline. Applicants not selected for funding will be notified in writing.

³ Employer must agree not to co-mingle District funds with their own for the purposes of the pilot program; separate accounts must be maintained to track expenditure funds.
⁴ OP recommends selection of employees on a first come, first served basis.
⁵ As defined by Department of Housing and Community Development’s Neighborhood Stabilization Program 3 (NSP3).

An applicant whose proposal is approved for funding will be required to enter into a contractual agreement with OP for implementation of the approved activities. This contractual agreement will include provisions that will ensure compliance with District laws and regulations and define the terms of the disbursement of funds.

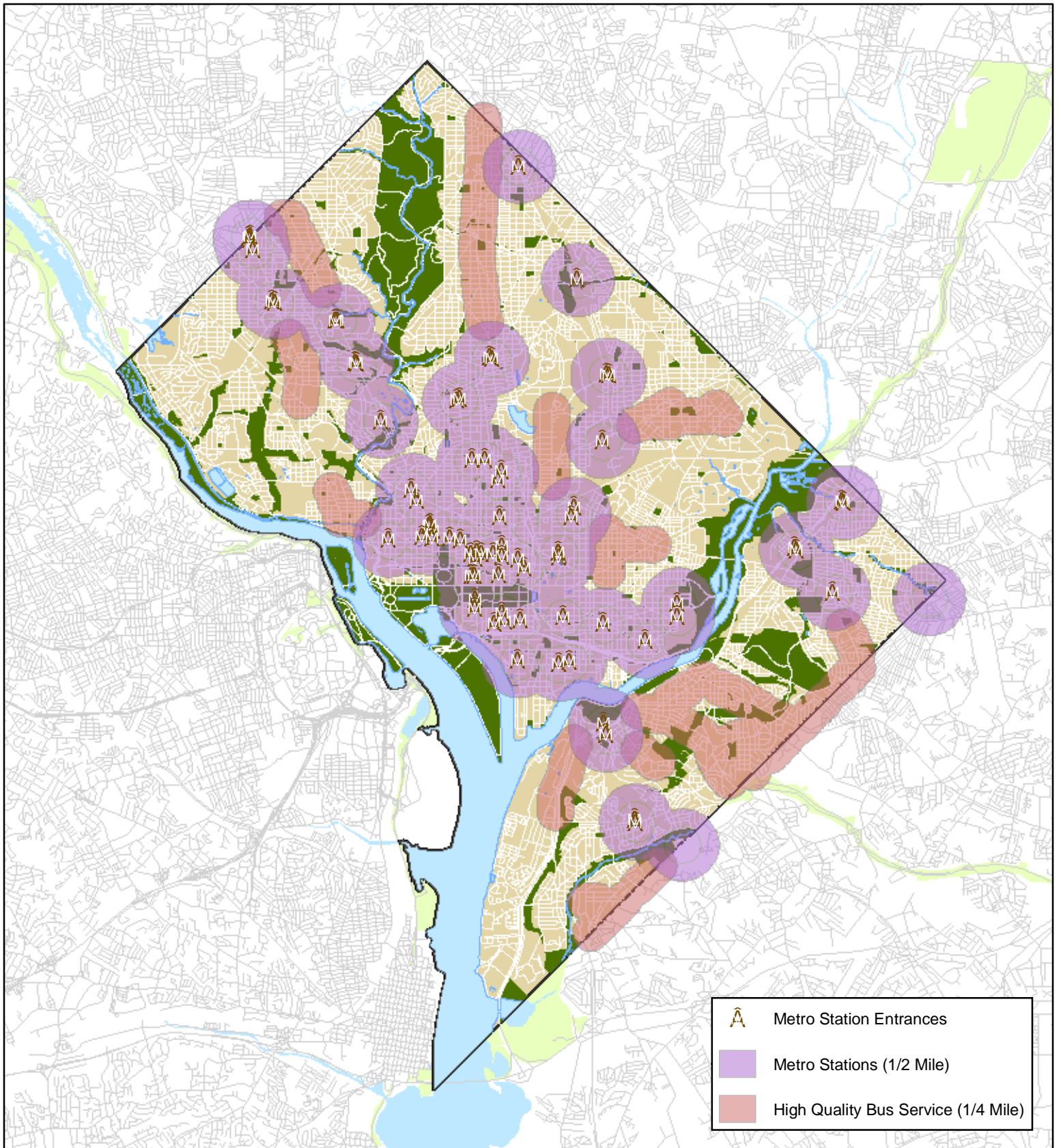
Prior to execution of the contractual agreement(s), the successful respondent will meet with OP staff to negotiate the specific activities that will be conducted under the contractual agreement. This effort will result in a detailed work plan, outcome measures, and budget that will become part of the contractual agreement. OP's goal is to execute this agreement no later than one month from the date of selection. OP reserves the right to refuse to proceed with any selected applicant at any time prior to the execution of the contractual agreement(s).

In accordance with District requirements, OP will conduct periodic evaluations of the awarded organization's use of funding and evaluate the LNYW pilot program's performance.




D. Payment:

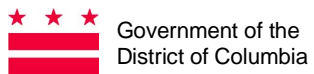
Selected employers will receive an initial allocation of up to \$60,000, which may be increased upon demonstration of additional employee demand and availability of funds.

Full payment details will be included in the contractual agreement entered into between OP and each selected grantee.



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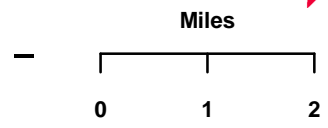
	Metro Station Entrances
	Metro Stations (1/2 Mile)
	High Quality Bus Service (1/4 Mile)

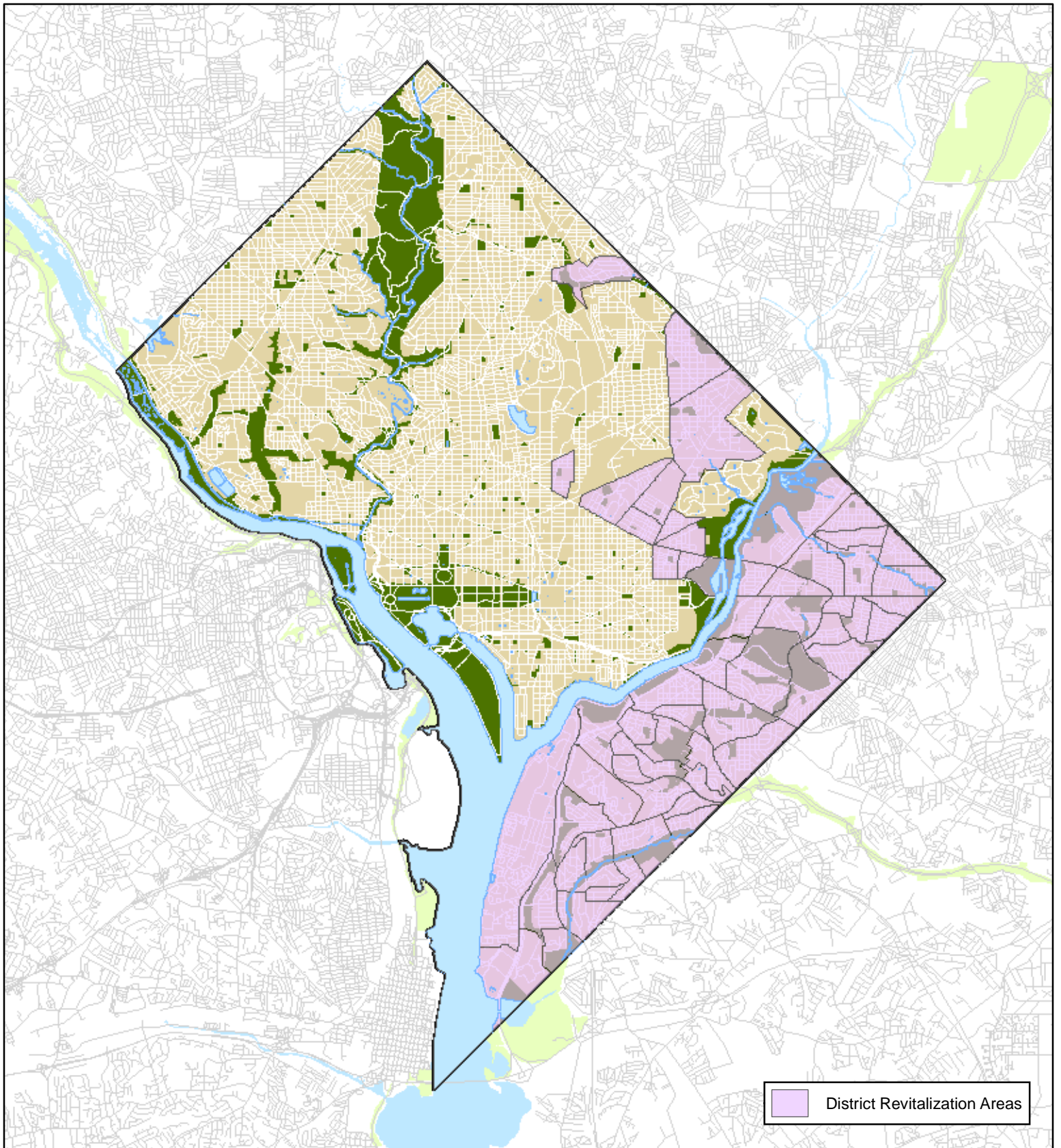


This map was created for planning purposes from a variety of sources. It is neither a survey nor a legal document. Information provided by other agencies should be verified with them where appropriate.

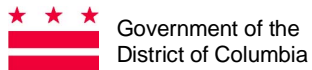
Map 1 Live Near Your Work Metro Station and High Quality Bus Service Areas

Office of Planning
April, 2011



OPID0019896



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Map 2 Live Near Your Work Revitalization Areas (NSP3)

Office of Planning
April, 2011

