

DOCUMENTATION OF
BENEFIT TO LOW- AND MODERATE-INCOME PERSONS

Project Title: _____ Project No.: _____

Please check **ONE** of the boxes below to indicate which of the criteria of benefit to low- and moderate-income persons the activity is designed to meet:

- Area benefit activities: An activity whose benefits are available to all of the residents in a primarily residential area where at least 51% of the residents are low- and moderate-income persons.
- Limited clientele activities: An activity which benefits a specific group of people, at least 51% of whom are low- and moderate-income persons.
- Housing activities: An activity which provides or improves permanent, residential structures which will be occupied by low- and moderate-income households upon completion.
- Job creation or retention activities: An activity designed to create or retain permanent jobs, at least 51% of which, computed on a full time equivalent basis, involve the employment of low- and moderate-income persons.

Please provide the following documentation for the **ONE** criterion checked above:

1. AREA BENEFIT ACTIVITIES

- a. Describe the service area: _____

- b. The percent of low- and moderate-income persons in the service area:
_____ %
- c. The specific criteria which the activity meets/will meet: _____

2. LIMITED CLIENTELE ACTIVITIES

Either:

- a. The category to be served by an activity that benefits a clientele that is presumed to be principally low- and moderate-income persons:

- | | |
|--|------------------------------|
| ___ Abused children | ___ Homeless persons |
| ___ Elderly persons | ___ Migrant farm workers |
| ___ Battered spouses | ___ Illiterate persons |
| ___ Severely disabled adults | ___ Persons living with AIDS |
| ___ Removal of material/architectural barriers to the mobility or accessibility of elderly or severely disabled persons. | |

- The expected percent of such persons to be served: _____%

Or

- b. For an activity that benefits a clientele at least 51% of whom are low- and moderate-income persons:

- **Either**

___ The activity requires information on family size and income so that it is evident that at least 51% of the clientele are persons whose family income does not exceed the low- and moderate-income limit.

or

___ The activity has income eligibility requirements which limit the activity exclusively to low- and moderate-income persons.

- The expected number of persons to be served: _____
- The expected percent of low- and moderate-income families or persons to be served: _____%

Or

- c. For an activity that is of such a nature and in such a location that it may be concluded that the activity's clientele will primarily be low- and moderate-income persons:

- Describe the service area in which the activity is/will be carried out:

- Describe how the nature of the activity establishes that it is used predominantly by low- and moderate-income persons (if necessary, a separate sheet of paper may be used and attached):

- The expected percent of low- and moderate-income persons to be served: _____%

Or

d. For a microenterprise assistance activity.

- The expected percent of low- and moderate-income owners of microenterprises to be assisted: _____%
- The expected percent of low- and moderate-income developers of microenterprises to be assisted: _____%

Or

e. For an activity designed to provide job training and placement and/or other employment support services.

- The expected percent of low- and moderate-income persons to be assisted: _____%

3. **HOUSING ACTIVITIES**

a. The type of permanent, residential structures to be provided or improved:

- | | |
|---------------------------|--|
| _____ one unit | _____ acquisition |
| _____ two units | _____ rehabilitation |
| _____ more than two units | _____ new housing construction |
| | _____ conversion of non-residential property |

- b. The type of occupants upon completion:
- _____ owner/occupant _____ renter
- _____ elderly _____ non-elderly
- c. The number of dwelling units to be assisted: _____
- d. The expected number of units to be occupied by low- and moderate-income persons after completion: _____ %
- e. The expected percent of units to be occupied by low- and moderate-income persons after completion: _____ %

4. JOB CREATION OR RETENTION ACTIVITIES

- a. For an activity designed to create permanent jobs:
- The number of permanent, full-time equivalent jobs to be created: _____
 - The percent of permanent, full-time equivalent jobs that will be held by or available to low- and moderate-income persons: _____ %
- b. For an activity designed to retain permanent jobs:
- The number of permanent, full-time equivalent jobs to be retained: _____
 - The percent of permanent, full-time equivalent jobs held by low- and moderate-income persons: _____ %
 - The percent of permanent, full-time equivalent jobs to be filled by or made available to low- and moderate-income persons within 2 years: _____ %