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## DETAILED APPLICATION INSTRUCTIONS

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*Revised April 2024*



*The Maryland Department of Housing and Community Development pledges to foster the letter and spirit of the law for achieving equal housing opportunity in Maryland*

# OVERVIEW

This application walkthrough provides information for completing and is meant to be used in tandem with the Application Documents Package found on the [UPLIFT website](#). The specific information that is to be entered into the individual fields on the different application documents is described below. If there are any questions or concerns regarding anything found in this walkthrough, please contact the UPLIFT team for all forms of assistance ([uplift.dhcd@maryland.gov](mailto:uplift.dhcd@maryland.gov)).

## STARTING YOUR APPLICATION

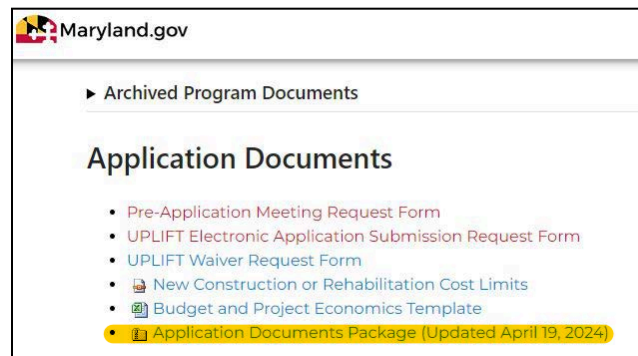
### ***Step 0 – Pre-Application Requirements***

Read the UPLIFT [Program Guide](#). Compile project details, timelines, plans, and logistics. Schedule and complete a [Pre-Application Meeting](#) and submit all the required pre-application material at least two business days before your scheduled meeting date. A Pre-Application Meeting must be completed before any formal application is considered.

*After your Pre-Application Meeting*, complete the [UPLIFT Electronic Application Submission Request Form](#). Upon completion and DHCD’s internal review, you will receive access to a Dropbox folder that you will use to submit your application.

### ***Step 1 – Application Download***

Download the Application Documents Package zip folder from the “Application Documents” section of the [UPLIFT website](#).



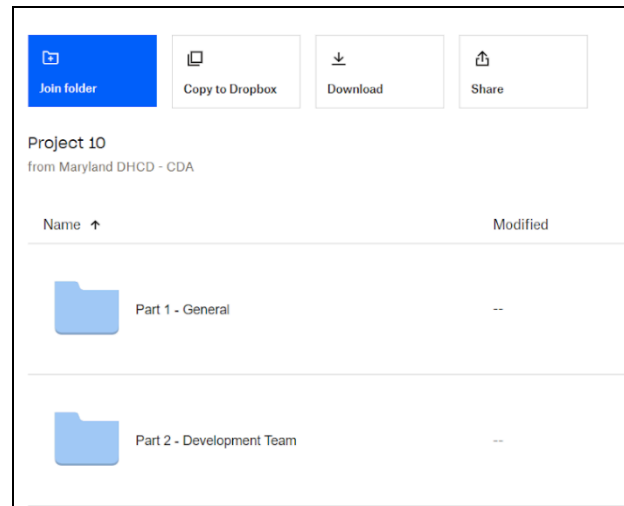
### ***Step 2 – Application Completion***

Complete each section of the application as necessary, using this document as a reference sheet. If further clarification is needed on any part, please schedule an appointment with the UPLIFT team online. You can also check the “UPLIFT Frequently Asked Questions” document on the UPLIFT website to see if your questions have been asked by other developers.

### ***Step 3 – File Submission***

Once your application documents are ready, you will need to use the Dropbox link shared with you to upload each application document in its respective folder. First, start by making a [free Dropbox account](#) via the “Sign up” button in the right-hand corner of your web browser.

Once you create an account, open Dropbox via the link that was shared with you. You will be met with a screen that displays your project name. While logged in, click the blue “Join folder” button on the top-left of the screen to gain access to the folder. *In order to upload documents to the folder, you MUST click the “Join folder” button.*



Once clicked, DHCD will be prompted to give you permission to add files to the folder. The UPLIFT team will grant you access to the folder, and you will be able to upload documents to their proper locations.

If you do not gain access to the folder within 24 hrs after following the steps above, please reach out to the UPLIFT team and we will ensure you are granted proper folder access.

Upon receiving access to your project Dropbox folder, please upload the requested documents in their respective folders. Be sure to include any additional developer uploads not explicitly mentioned in the application as necessary.

#### **Step 4 – Final Submission Checklist**

Once you have uploaded all necessary documentation for the project application, please complete the Final Submission Checklist. This document will be available to you within your Dropbox project folder. To complete this document, applicants must check off each part of the application to confirm it has been submitted, note any substantial comments for the underwriting team to be aware of, and sign off for each application section.

Once completed, this checklist should be submitted with both your electronic and physical applications. *Applications that do not submit this checklist will be deemed incomplete and will not proceed to the DHCD evaluation process.*

#### **Step 5 – Final Application Submissions**

Final applications are to be submitted both electronically (via Dropbox) and physically. Your electronic application will be deemed complete once you submit all necessary documents and your signed Final Submission Checklist to your Dropbox folder. Your physical application should be dropped off in-person to the Operations & Administration Office at the Maryland Department of Housing and Community Development Headquarters at: 7800 Harkins Road, Lanham, MD 20706.

# APPLICATION BREAKDOWN

The following breakdown contains additional clarifying information for each part of the UPLIFT Application. The breakdown primarily focuses on clarifying what needs to be completed for the Excel portions of the application. The UPLIFT Program Guide includes expanded definitions and explanations and where relevant, the corresponding Guide Sections are provided for the Application sections. For additional assistance on any portion of the application, please reach out to the UPLIFT team ([uplift.dhcd@maryland.gov](mailto:uplift.dhcd@maryland.gov)).

General Note: In Excel, the cells marked in Light Orange, Light Blue, and Light Red are generally for developer input.

## **Part 1: General Elements**

### **1.A. Application Contents**

No submission/action needed for this control document.

### **1.B. Application General Information**

Please fill in all basic information for each input cell. Any item request that requires a local district search for information has a link embedded in the document. Please use the embedded websites to find any information needed and report in the provided cell.

### **1.C. Overall Project Narrative**

Please reference the instructions provided on this portion of the application. If further clarification is needed, please reach out to the DHCD team.

### **1.D. Applications Certification Package**

Read, review, and sign the entirety of this packet. Signatures are required on pages 9, 13, 17, 20-21, and 23-27.

### **1.E. Threshold Checklist**

Please only complete the “Applicant Self Evaluation” portion of this document.

### **1.F. Application Scoring Summary**

#### **4.1.1 – Team Experience**

Fill out the Proposed Construction Type, Proposed Project DUs, and Proposed Project Total Construction Cost on the top-left portion of the sheet. Provide information on any previously completed projects that are comparable to the proposed project. *NOTE: If you are applying for your first UPLIFT Project, or unless you have been advised otherwise by DHCD staff, this section should score to zero (0).*

#### **4.1.2 – Experience Deductions**

Provide insight on the following information as it relates to your experience working with DHCD. *NOTE: If this is your first time working with DHCD, or unless you have been advised otherwise by DHCD staff, all answers should be “No.”*

#### **4.1.3 – Financial Capacity**

Enter the total development costs for this project in the upper portion of the sheet. Provide information on the liquidity of the various project partners, including both assets and liabilities. Your scores will be calculated by comparing your current working capital to the total development cost of the project. The figures entered should align with the submitted financial statements.

#### **4.1.4 – NPs, PHAs, MBE/DBEs**

Review the roles listed on the left-hand side of the spreadsheet. If you will be using an entity that meets the criteria of this role, enter their name and change their status to “Yes.”

#### **4.2.1 – Project Impact**

Review the proposed area of work for your project. Insert the number of vacant parcels that will be worked on for the proposed project and enter the number of vacant parcels in the Project Area (PA). This will calculate a percentage of “Critical Market Mass (CMM)” being addressed, which will dictate your score for this section ( $(\text{Vacancies}/\text{Vacancies in Area}) * 30$ ).

#### **4.2.2 – Project Impact**

Type in the number of units that fall into the respective AMI (Area Median Income) Bands in your project’s site location. The spreadsheet will calculate a weighted average percentage based on your inputs and will determine the “Average Area Median Gross Income” range your average falls between to dictate the number of points you will earn for this section.

#### **4.3.1 – Leveraging and Cost Effectiveness**

This section calculates the ratio of non-state funding used to assist in the overall cost of the project. Insert the total estimated project cost into the required section, then list all non-state funding that will be used for this project. (See the Project Guide for how the program categorizes various sources of State support.) The number of points earned will reflect how you are utilizing non-state funds to complete this project ( $(\text{Sum of Non-State Funding}/\text{Total Project Cost}) * 30$ ).

#### **4.3.2 – Leveraging and Cost Effectiveness (cont.)**

This section awards points based on how your projects will positively affect the surrounding community. Review your plan and note how much you will be investing in each category. Your status and score for this section will be calculated automatically following your “Total Value” inputs.

#### **4.4.1 – Neighborhood Plan Alignment**

Change the “Status” column to indicate how your project scope matches the neighborhood’s plan-specific goals. Scores will automatically be calculated accordingly.

#### **4.4.2 – Readiness to Proceed: Site Assessment Due Diligence**

Review the instructions provided on the side of the Excel sheet. To properly calculate the proportions for each question, please fill in the number of building sites to be transformed, and the overall number of negative vacant sites in the PA.e.

#### **4.4.3 – Readiness to Proceed: Land Use and Construction Approvals**

Change the “Status” column to reflect the project’s readiness to proceed for each planning section. Scores will automatically be calculated accordingly.

#### **4.5.1 – Design Quality**

Change the “Status” column to reflect the project’s design quality for both the interior and exterior of the renovated houses. Scores will automatically be calculated accordingly.

#### **4.5.2 – Excess Cost**

Insert the total square footage of the project and the total project costs. These values should include all properties being worked on in the project’s scope. Your score will be automatically calculated based on your estimated Cost/SF vs. the Cost/SF Limit.

## **Part 2: Development Team**

### **2.A. Development Team Narrative**

Please reference the instructions provided on this portion of the application. If further clarification is needed, please reach out to the DHCD team.

### **2.B. Project Organization Chart**

Provide the name and basic information of each entity in the project, as well as any ownership percentages in the project’s development entity divided between the entities.

### **2.C. 203 Lead Developer Background Form**

Carefully complete the Excel spreadsheet, detailing all required information about the developer and sponsor/owner. Please provide additional information if needed to meet all question requirements.

### **2.D. 203 Associate Developer Background Form**

Carefully complete the Excel spreadsheet, detailing all required information about the associate developer. Please provide additional information if needed to meet all question requirements.

### **2.E. 203 GC Background Form**

Carefully complete the Excel spreadsheet, detailing all required information regarding the project's GC. You may include any additional documentation that may assist in DHCD's review at your own discretion.

### **2.F. 203 Architect Background Form**

Carefully complete the Excel spreadsheet, detailing all required information regarding the project's Architect. You may include any additional documentation that may assist in DHCD's review at your own discretion.

### **2.G. Marketing and Sales Agent Background Form**

Carefully complete the Excel spreadsheet, detailing all required information regarding the project's Marketing and Sales Agent. You may include any additional documentation that may assist in DHCD's review at your own discretion.

### **2.H. Neighborhood Engagement Facilitator Background Form**

Carefully complete the Excel spreadsheet, detailing all required information regarding the project's Neighborhood Engagement Facilitator. You may include any additional documentation that may assist in DHCD's review at your own discretion.

## **Part 3: Project Economics**

### **3.A. Project Economics Narrative/Plan**

Please reference the instructions provided on this portion of the application. If further clarification is needed, please reach out to the DHCD team.

### **3.B. Project Economics Workbook**

Provide an economic breakdown of the proposed project. Provide breakdowns of the totals, per unit costs, and per SF costs of the construction phase of the project for both sources and uses. Provide breakdowns for permanent funding sources and uses, as well as a proposed project schedule. Do not insert values into the "Summary" sheet manually - these values will be pulled from the other three sheets as necessary. Feel free to submit any budgets or breakouts you wish to supplement the required workbook.

## **Part 4: Project Area (PA) and Site(s)**

### **4.A. Project Location Narrative**

Please reference the instructions provided on this portion of the application. If further clarification is needed, please reach out to the DHCD team.

### **4.B. Project Property Roster**

Indicate all parcels and their locations. Indicate the condition, the lot's square footage, the estimated as-is value, and the control status of each property.

- Negative Vacant – Vacant property with no planned usage at the time of writing.
- Benign Vacant – Vacant property with a future use already determined by an outside entity (ex: city jurisdiction dictating 3 vacant land lots to be turned into local park by 2027).

### **Developer Uploads**

Developer Uploads should include a Neighborhood Plan, Project Area Maps, Site Location Maps, Project Area Photos, and Evidence of Site Control, as well as any additional documentation that may assist in DHCD’s review.

## **Part 5: Design and Construction**

### **5.A. Design and Construction Narrative/Plan**

Please reference the instructions provided on this portion of the application. If further clarification is needed, please reach out to the DHCD team.

### **5.B. Environmental Checklist**

Following your team’s personal site survey, complete the Environmental Checklist. Review each potential environmental risk and indicate whether a risk was observed, deemed possible, or not observed by selecting “Yes” or “No” in the respective columns.

### **5.C. Construction Budget**

Provide a cost breakdown for each item of work. Breakdown should include the average cost per GSF, average cost per unit, and the total cost for each line item.

### **Developer Upload – Schematics**

Developer Uploads should include schematics for each unit type that is to be renovated or created, as well as any additional documentation that may assist in DHCD’s review.

## **Part 6: Marketing and Sales**

### **6.A. Marketing and Sales Narrative**

Please reference the instructions provided on this portion of the application. If further clarification is needed, please reach out to the DHCD team.

## **Part 7: Neighborhood Engagement**

### **7.A. Neighborhood Engagement Narrative**

Please reference the instructions provided on this portion of the application. If further clarification is needed, please reach out to the DHCD team.