## Neighborhood Planner

### Tasks
- Conduct Surveys and Analyze Data
- Coordinate community/tribal meetings
- Evaluate and map physical and financial assets
- Assess feasibility of new economic development initiatives (w/tribal authorities)
- Develop/assemble the comprehensive plans

### Skills
- Degree in Planning/Architecture
- Experience in developing comprehensive plans
- Knowledge of housing programs and procedures
- Knowledge of construction/building housing and infrastructure
- Familiarity with zoning, building, health and safety codes
- Understanding of economic development principles and strategies
- Knowledge of traditional and non-traditional funding sources

### Contract
- Prepare agreement and contract with specific tasks and performance measures with atty
- Use in-house staff to evaluate existing data and conduct survey
- Costs vary by region and level of information needed

## Market Assessor

### Tasks
- Market analysis to determine demand, profile of population to consume housing, affordable prices/rent ranges, comparables, present/projected competition

### Skills
- Experience in doing market analysis and particularly market/demand of housing for lower income households
- Knowledge of cost, market, analysis types

### Contract
- Prepare agreement with performance measures
- Use existing available research as feasible
## FINANCIAL PACKAGER

### TASKS
- Develop a workable package of private/public funding along with needed subsidy
- Financial Feasibility Analysis
  - Development costs
  - Operating costs
  - Revenues
- Proformas
  - Prepare project for initial closing
    - Negotiate terms w/ lenders (w/owner)
    - Assemble required financial, organizational, and construction documents
    - Obtain final lender commitments
    - OPTIONAL: Assemble remaining closing document and work with lawyers and assist the Owner in meeting obligations for closing

### SKILLS
- Experience in packaging proposal to public sources and private lenders
- Knowledge of real estate finance
- Knowledge of the costs of developing and operating housing for lower income persons in the respective market; experience in ascertaining pertinent data and making accurate cost projections and assumptions
- Working of knowledge of federal, state, local, and private funding, especially options for long-term subsidies
- Knowledge of conventional financing sources and the ramifications and legalities of meshing public and private dollars
- Knowledge of construction and permanent financing;
- Ability to create development proformas, with equity, gap, sources and uses

### CONTRACT
- Prepare agreement and contract with specific tasks and performance measures with atty.
- Costs vary by location, project type, size and complexity of loan source.
- Typical costs: 3% of total funding sources for packaging through lender commitments
- Add 1% fee to bring to closing

## ENVIRONMENTAL ASSESSOR

### TASKS
- Conducts preliminary review for acquisition
- Environmental review of site and building, including site visits, review of federal, state, local and tribal records, interviews; analysis, recommendations and reports in accordance laws, regulations and lender’s guidelines.

### SKILLS
- Certification/ Accreditation as environmental assessor
- Knowledge of funding sources environmental underwriting guidelines
- Experience in conducting HUD

### CONTRACT
- RFP for ASTM Phase I, II
- Contract to provide report and recommendations
- Keep separate assessors and remediation
and firms

- Costs for Phase I
  - $1,700-$2,300

### APPRAISER

<table>
<thead>
<tr>
<th>TASKS</th>
<th>SKILLS</th>
<th>CONTRACT</th>
</tr>
</thead>
</table>
| • Determine fair market value of site/property | • License/Accreditation  
• Knowledge of local real estate market  
• Experience in appraising similar projects | • Use standardized agreement  
• Costs vary by region, size, and type; from $225 each SFH to $400 for 1-4 unit to $2,500 for multi-family large  
• Certified by State (optional) member of __________ |

### ATTORNEY

<table>
<thead>
<tr>
<th>TASKS</th>
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</table>
| • Review legal and regulatory documents  
• Site control negotiating and closing  
• Preparation of property closing documents, loan closing documents;  
• Act as General Counsel | • Degree and license in Law  
• Knowledge of affordable housing real estate development process and experience in legal and financial aspects of producing affordable potentially subsidized housing  
• Knowledge of affordable housing development, organizational, contract, and real estate law  
• Skill in negotiating for publicly and privately held properties; knowledge of local real estate market; understanding of legalities and requirements of various site control options | • Negotiate hourly fee and agreement for project related work  
• Avoid retainer-type arrangements |

### ARCHITECT/ENGINEER

<table>
<thead>
<tr>
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### CONSTRUCTION MANAGER

<table>
<thead>
<tr>
<th>TASKS</th>
<th>SKILLS</th>
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</thead>
<tbody>
<tr>
<td>• Prepare construction budgets and obtains estimates and bids and subcontracts contracts for construction or rehabilitation</td>
<td>• Experience in managing similar projects and working with tribal entities and/or nonprofit developers</td>
<td>• RFP for bids</td>
</tr>
<tr>
<td>• Manages and monitors construction schedule, costs, and quality in accordance with the plans and specifications</td>
<td>• Knowledge of construction techniques, methods, and materials.</td>
<td>• Use AIA Contracts modified by Atty.</td>
</tr>
<tr>
<td>• Oversees quality, schedule of subcontractors for the Owner</td>
<td>• Knowledge of design and innovative (cost saving, energy efficient) building practices and other issues related to project location</td>
<td>• Fees are percentage of construction costs and vary by project size, region. $500K-1 mil 4%-5%; Under $500 averages 8%.</td>
</tr>
<tr>
<td><strong>GENERAL CONTRACTOR</strong></td>
<td><strong>SKILLS</strong></td>
<td><strong>CONTRACT</strong></td>
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<tr>
<td><strong>TASKS</strong></td>
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</tr>
<tr>
<td>• Prepare cost estimates for construction or rehabilitation</td>
<td>• Experience with constructing similar projects and working with nonprofit developers</td>
<td>• RFP for bids</td>
</tr>
<tr>
<td>• Performs construction work in accordance with the contract for construction, plans and specifications</td>
<td>• Knowledge of construction techniques, methods, and materials</td>
<td>• Use AIA Contract Documents or equal modified by atty. Avoid Cost Plus Fee Contracts</td>
</tr>
<tr>
<td>• Ensures quality, schedule of subcontractors</td>
<td>• Knowledge of design and innovative (cost saving, energy efficient) building practices and other issues related to project location</td>
<td>• Costs based on location, type materials, and number of units</td>
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<td>• Get cost breakdown by trade for new and substantial rehab</td>
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<thead>
<tr>
<th><strong>PROPERTY EVALUATOR</strong></th>
<th><strong>SKILLS</strong></th>
<th><strong>CONTRACT</strong></th>
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<tbody>
<tr>
<td><strong>TASKS</strong></td>
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<tr>
<td>• Identify and research potential sites</td>
<td>• Knowledge and experience in local real estate activity i.e. ownership, values, prices, regulatory issues, etc.</td>
<td>• Prepare agreement and contract with specific tasks and performance measures with atty</td>
</tr>
<tr>
<td>• Evaluate sites</td>
<td>• Ability to research properties (legal, land uses, environmental, taxes, neighborhood issues, infrastructure); assess pros and cons of sites and make recommendations</td>
<td>• Costs vary by region and number of evaluation factors</td>
</tr>
<tr>
<td>• Local regulatory review and approval process</td>
<td></td>
<td>• Range from $2,000 to $5,000 per project</td>
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<tr>
<td>• Environmental review</td>
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<td>• Development review</td>
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<td>• Architectural review</td>
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<tr>
<td>• Other local and federal requirements</td>
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<thead>
<tr>
<th><strong>PROJECT MANAGER</strong></th>
<th><strong>SKILLS</strong></th>
<th><strong>CONTRACT</strong></th>
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<tbody>
<tr>
<td><strong>TASKS</strong></td>
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<tr>
<td>• Set development agenda</td>
<td>• Extensive understanding of housing development process</td>
<td>• Prepare agreement and contract with</td>
</tr>
</tbody>
</table>
- Develop and manages work plan
- Site control negotiating and closing
- Negotiate, hires, and coordinates work of team members
- Manage budget, schedule, compliance with loan/grant requirements
- Take project from concept to lease-up or sales Site control negotiating and closing.

and ability to review and assess work of team members
- Ability to: 1) take charge and make decisions; 2) solve problems; 3) negotiate; 4) engage team members and remove team members, when necessary
- Knowledge of the federal, state local and private loan source regulations and requirements
- Experience in managing projects of similar scope and scale.

specific tasks and performance measures with atty
- Costs vary by region and project type, size.

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**HOME BUYER TRAINER/COUNSELOR**

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<thead>
<tr>
<th>TASKS</th>
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</table>
| • Recruit and train first time home buyers  
• Provide additional credit and budget counseling to families needing additional credit  
• Track home owners for future services | • Ability to market and assemble pool  
• Ability to develop and transition renters to home buyers  
• Knowledge of mortgage loan process and underwriting and Fair Housing Laws.  
• Knowledge of local banking environment  
• Ability to access professional trainers. Real Estate Agent, Insurer, etc.,  
• Familiarity with development process and construction | • Based on a per home buyer fee, from $125 to $300 |