

PRE-APPLICATION



Client-Deal Number:

Note: Completion of this form does not guarantee an application will be invited. Program and Policy Coordinator may provide comments and suggestions for further project development.

SECTION 1 A: POTENTIAL APPLICANT			
Organization Name		Organization <i>(Identify the ORS under which entity is formed if potential applicant is an entity other than city or county, such as special district, authority, association, et cetera.)</i>	
Street Address and County		Mailing Address	
Office Phone		Web URL	
SECTION 1 B: PROJECT CONTACT			
Name		Title	
Phone		Email	
Phone (cell)			
SECTION 1 C: PROJECT OVERVIEW			
Project Name			
Project Location <i>(physical address / attach map)</i>			
Project Category			
Planning	Design only	Construction only	Design & Construction
Other:			
SECTION 1 D: ESTIMATED FUNDING REQUEST			
	Amount		
Funding Request from Business Oregon			
Funds from potential applicant		Not Budgeted	Budgeted
Other Funds:		Pending	Committed
		If committed, provide term:	
Other Funds:		Pending	Committed
		If committed, provide term:	
Estimated Total Project Cost			

Cost Estimate Date:	Prepared by
Estimated Project Start Date:	Completion Date:
If funding assistance from Business Oregon includes a loan, how will it be repaid?	
Estimated date of first draw:	

SECTION 1 E: PROJECT DESCRIPTION

Opportunity / Problem

Proposal / Solution *Describe the proposed solution to the above problem / opportunity including identification of whether the proposed solution is a planning (feasibility, preliminary engineering, technical assistance et cetera.) only project, a final design only project, a construction only project or a combined final design / construction project.*

**SECTION 1 G: BACKGROUND INFORMATION – PART 2
FOR DESIGN AND/OR CONSTRUCTION PROJECTS**

Is the project based on a technical document that shows the project is feasible, cost effective, and completed by a licensed engineer or architect (such as approved Master Plan, Facilities Plan or other technical report)? **Yes** **No**

If Yes, date of plan or report:

If No, when will an engineering or architectural report be completed?

Has the governing body of the potential applicant conducted a public meeting (council or board meeting, public hearing, workshop, et cetera) to identify and discuss the proposed project, including such items as nature and need for the project, starting date, financing requirements that may involve taking on additional debt, and consistency with the local comprehensive land use plan, countywide or regional plan? **Yes** **No**

Type of public meeting:

Date of public meeting:

If No, when will the public meeting be held?

FOR WATER OR WASTEWATER PROJECTS ONLY (FOR DESIGN AND/OR CONSTRUCTION PROJECTS)

Are the audited financial reports for the three most recent fiscal years available on the Secretary of State website? **Yes** **No**

If No, attach the most recent financial reports (audited, if available)

What is the existing annual debt service for the existing system?

What is the amount, if any, of existing annual debt service for the system that is paid by property taxes?

per year water

per year wastewater

Planned Monthly Residential User Charge Upon the Completion of Construction (must adequately cover operation, maintenance, replacement and debt financing):

per month water

per month wastewater

Is there a current OM&R (Operation, Maintenance and Replacement) Manual for the system? **Yes** **No**

Are Maintenance and Replacement expenditures budgeted annually? **Yes** **No**

Are meters installed on all service connections? **Yes** **No**

If No, percentage not metered and provide explanation:

USE	Current / Existing System	Future / at Completion of Construction	Current / Existing System	Future / at Completion of Construction	Gallons per Year
	Connections	Connections	Billable Accounts	Billable Accounts	Usage
Residential					
Commercial and Businesses					
Industrial					
Other					
Total Uses					
Of Residential, Number occupied by Permanent Residents					
Percentage of Permanent Residents					

SECTION 2 A: TO BE COMPLETED BY BUSINESS OREGON STAFF ONLY
(APPLICABLE FOR ALL PROJECT TYPES)

Does the potential applicant have other open Business Oregon grants and/or loans? Yes No
If yes, list each open Business Oregon award by project name, number, award amount and project status:

Is potential applicant pursuing CDBG funding? Yes No

If yes, complete A and B below:

A. Does potential applicant have more than three open CDBG grants? Yes No
If yes, explain:

B. Is potential applicant meeting the age and expenditure requirements for all open CDBG grants? See the age and expenditure requirements below: Yes No

- Requirements for open **ONE-YEAR** grants are:
 - Any Microenterprise grant this is one year old must be 70% drawn
 - Any Microenterprise grant that is two years old must be administratively closed
 - Any Housing Rehabilitation project that is one or two years old must be meeting contract requirements
 - Any Housing Rehabilitation project that is three years old must administratively closed
- Requirements for open **MULTI-YEAR** grants are:
 - Any grant that is two years old must be 60% drawn
 - Any grant that is three years old must be 100% drawn
 - Any grant that is four years old must be administratively closed

Potential Applicant Population	Low / Mod Income %	Median Household Income
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Distressed Area	Yes	No	Mixed	Rural Area	Yes	No	Mixed
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One Stop Meeting (Attach Financial Worksheet from One Stop session if applicable)

Date	Notes
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Salesforce Posting Date

SECTION 2 B: TO BE COMPLETED AFTER SALESFORCE COMMENT PERIOD BY BUSINESS OREGON STAFF ONLY
(APPLICABLE FOR ALL PROJECT TYPES)

Comment received	Yes	No	If yes, attach
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Invite Application for the following source or sources:

CDBG	SDWRLF	DWSP	SPWF	Comments
WWF	PPMF	OPRLF	MNIF	
Other				

Regional Development Officer / Regional Project Manager

Name

Signature

Date