Minority Developer Program
Mentee Pre-qualification Application Form

APPLICANT (MENTEE) INFORMATION

1. Applicant Name _____

2. Company Name _____

3. Applicant Role (ex. owner, partner, etc.) _____

4. Number of Employees _____

5. Year Established _____

6. Type of business:*   S-Corp   C-Corp   Sole Proprietor   LLC   LLP

   Other _____

7. EIN _____ City Tax ID # _____

8. Is your business certified as   MBE   WBE   DSBE   LBE (check all that apply)?

9. Location

   a. Street _____

   b. City _____

   c. State _____

   d. Suite/Unit _____

10. Business e-mail Address _____

11. Website _____

12. Best Contact Number _____   cell   office   home

    *Please submit a copy of organizational documents (i.e. incorporation documents)

DEVELOPMENT EXPERIENCE

13. Type of Projects Completed (check all that apply)

    New Construction

    Rehab / Adaptive Reuse

    Residential

        Single-Family   Multifamily

    Commercial

        Industrial   Office   Mixed-Use   Retail

    Public/Government Land

    Affordable/Workforce Housing

    Other _____

14. List Projects (use Mentee Project List Form)

15. Largest Project Size (total project cost)

☐ Less than $250,000   ☐ $1,000,000-$3,000,000

☐ $250,000-$500,000   ☐ $3,000,000-$6,000,000

☐ $500,000-$1,000,000   ☐ Greater than $6,000,000

16. How many years has the business been operating?

☐ Less than 1   ☐ 7-10

☐ 1-3   ☐ 11-15

☐ 4-6   ☐ Greater than 16

17. How many years of experience do you (as employee and business owner) have in the development industry?

Less than 1   ☐ 7-10

☐ 1-3   ☐ 11-15

4-6   Greater than 16

18. Has your company developed public land (PHDC, PRA, PLB, PIDC, Public Property)?

Yes _   No   If so, identify the addresses on the Mentee Project List Form.

19. What tools/software do you use to manage your development projects?

Primavera   ☐ Excel

MS Project   ☐ Procore

Builder Trend   ☐ MS Word

Other _____ ☐ None

FINANCIAL CAPACITY

20. Annual Revenue 2020**

Less than $100,000   ☐ $300,000-$500,000

$100,000-$200,000   ☐ $500,000-$1,000,000

$200,000-$300,000   ☐ Greater than $1,000,000

21. Annual Revenue 2019**

Less than $100,000   ☐ $300,000-$500,000

$100,000-$200,000   ☐ $500,000-$1,000,000

$200,000-$300,000   Greater than $1,000,000

** Please submit a copy of 2019 and 2020 tax returns or audited financials to verify revenue.

22. Largest construction loan secured***

☐ Less than $200,000   ☐ $1,000,000-$3,000,000

☐ $250,000-$500,000   ☐ $3,000,000-$6,000,000

☐ $500,000-$1,000,000   ☐ Greater than $6,000,000

23. Largest mortgage financing secured***

☐ Less than $200,000   ☐ $1,000,000-$3,000,000

    $250,000-$500,000   ☐ $3,000,000-$6,000,000

    $500,000-$1,000,000   ☐ Greater than $6,000,000

*** Please submit a copy of loan commitment document for a project of approximately $200,000 or more.

KEY STAFF AND TEAM MEMBERS

24. Please provide a very brief bio of key company team members

_____

_____

_____

_____

_____

_____

_____

_____

_____

25. Please provide a list of key third-party team members (i.e. GC, architect, engineer, real estate

attorney, lender, accountant)

Contact Name_____   **Contact Name**_____

Company _____ Company _____

Email _____ Email _____

Phone _____ Phone _____

Service provided _____ Service provided _____

Contact Name

Company _____

Email _____

Phone _____

Service provided _____

Contact Name

Company _____

Email _____

Phone _____

Service provided _____

Contact Name_____

Company _____

Email _____

Phone _____

Service provided _____

Contact Name_____

Company _____

Email _____

Phone _____

Service provided _____

MENTEE GROWTH OPPORTUNITIES AND GOALS

26. Self-Assessment/Rating (5= expert, 4= very, good 3=solid, 2=beginner, 1=no experience); add # for each category

    Financing/Loan Structuring   Accounting

    Access to Capital   Pro formas

    Contracts   Risk Management

    Back Office/Administration   Entitlements/Permitting

    Business Formation   Other   _____

27. What aspects of development would you like to be mentored in? (Check all that apply)

    Financing/Loan Structuring ☐ Accounting   Back Office/Administration

    ☐ Access to Capital   ☐ Pro formas   Entitlements/Permitting

    ☐ Contracts   ☐ Risk Management Business Formation

    Other _____

28. What are your 1, 5 and 10 year real estate development goals – include project type, number, size and budget

    _____

    _____

    _____

    _____

    _____

    _____

29. Are you willing to enter into a joint venture partnership with other mentees or mentors (small or large) on real estate development projects? Yes ___ No ___

30. What resources do you currently leverage to develop your skills?

    Podcasts   ☐ Books   Mentors   ☐ None

    Networking Groups ☐ Classroom (includes online)   Other _____

31. Are you interested in taking an online *pro forma* training course? Yes___ No___

    If yes, how many hours per week are you able to commit? _____

32. What is your comfort level using Microsoft Excel?

    Expert   ☐ Experienced   ☐ Functional

    ☐ Improving   ☐ Novice   Never used it

33. What is your preferred learning methodology?

    ☐ Online   ☐ In-person

    ☐ Shadowing   ☐ One-on-one

    Hands on   Other