

WHEDA

2016 LIHTC Self Scoring Exhibit

Calculate Applicant Scores for your development on this Exhibit. You must proactively choose or decline participation in each scoring category. **Points will not be awarded if not requested, or if the required documentation for a category is not submitted, is insufficient, or is in an unacceptable form. Applicants must commit via written agreements to actions supporting points awarded in scoring categories. Once a development has executed a Reservation of Credit, no changes to the development score will be allowed.**

WHEDA will determine final point scores after reviewing information provided by applicant. **If two or more applicants receive the same score, the application with the highest percentage of units set aside at 30% and 40% of county median income will be ranked the highest. A secondary tiebreaker, if needed, will rank applications by lowest cost per unit.**

All developments must score at least 130 points to be eligible for Credit. Points ending in a fraction will be rounded down. WHEDA reserves the right to change this threshold as it deems appropriate.

Unless otherwise noted, for scattered site developments, two-thirds of the sites must meet the scoring category criteria to receive points.

	Maximum Points	
1. Lower-Income Areas	5	
2. Energy Efficiency and Sustainability	43	
3. Community Notification and Support	8	
4. Mixed-Income Incentive	15	
5. Serves Large Families (Three-bedroom or larger units)	8	
6. Serves Lowest-Income Residents	80	
7. Supportive Housing	20	
8. Elderly Assisted Living-RCACs	18	
9. Rehab/Neighborhood Stabilization	30	
10. Universal Design	23	
11. Financial Participation	25	
12. Ownership Characteristics	6	
13. Eventual Tenant Ownership	3	
14. Project Team	50	
15. Readiness to Proceed	15	
16. Credit Usage	40	
17. Employment Centers and High Need Areas	20	
Scoring Total	409	

1. Lower Income Areas (5 points)

Eligible Locations:

1. Developments located in a qualified census tract (see appropriate appendix Qualified Census Tract (QCT), and in which the development contributes to a community revitalization/redevelopment plan
 - Attach a print out of census tract from American Fact Finder or similar program

AND

 - Provide the website location for the community revitalization/redevelopment plan or provide a hard copy of the plan
2. Developments on federally designated tribal lands.
 - These applications do not need to submit a community revitalization/redevelopment plan, but must attach a map of tribal land showing the project location

2. Energy Efficiency and Sustainability - Maximum Score (43 Points)

Points will be awarded to developments which promote long term energy efficiency and sustainability through thoughtful design and development location.

Points	Description						
25	<p>Wisconsin Green Built Home Certification</p> <p>Points will be awarded to developments certifying they will be/have been built according to the Wisconsin Green Built Home Standard (www.greenbuilthome.org/greenbuilthome).</p> <p>Architect certification showing intent is required with initial application and must include the scoring range that is being certified. Wisconsin Green Built Home certification will be required prior to release of 8609.</p> <p>WGBH Score and corresponding points</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 60%;">WGBH Score greater than 150 points</td> <td style="text-align: right;">25 Points</td> </tr> <tr> <td>WGBH Score 120 to 150 Points</td> <td style="text-align: right;">15 Points</td> </tr> <tr> <td>WGBH Score 75 to 119 Points</td> <td style="text-align: right;">10 Points</td> </tr> </table>	WGBH Score greater than 150 points	25 Points	WGBH Score 120 to 150 Points	15 Points	WGBH Score 75 to 119 Points	10 Points
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3	<p>Focus on Energy Consultation</p> <p>Submit a letter from Focus on Energy stating that the applicant has met, in person, with Focus on Energy staff to review this proposed development for possible energy savings ideas OR provide evidence that Focus on Energy has conducted a no-cost energy audit for an existing multifamily building listed on the application.</p> <p>Refer to Focus on Energy website located at: www.focusonenergy.com</p>						
10	<p>Strong Linkages</p> <p>Note: Preservation Set-Aside projects cannot score points in this category.</p> <p>WHEDA is committed to housing which provides the best possible linkages for residents and which potentially reduces resident transportation costs.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 33%;">Walk Score</th> <th style="width: 33%;">Walkscore (for scattered site)</th> <th style="width: 33%;">Points Calculated</th> </tr> </thead> <tbody> <tr> <td style="height: 20px;"> </td> <td> </td> <td> </td> </tr> </tbody> </table> <p>Find "Walk score" value by visiting www.Walkscore.com and typing in the project address. Multiply Walk score by 0.10 and round down to the next whole number.</p> <p>Print the Walk score webpage and submit your calculation with initial application. WHEDA will use the applicant's submitted print-out unless WHEDA needs to rerun due to applicant error</p> <p>For scattered sites, take the average of all of the address scores.</p>	Walk Score	Walkscore (for scattered site)	Points Calculated			
Walk Score	Walkscore (for scattered site)	Points Calculated					
5	<p>Public Transportation</p> <p>Points will be awarded to developments located in which any portion of the site is no more than two</p>						

	tenths (0.2) of a mile from a regularly scheduled local bus stop. Projects on tribal land with “on call” transportation programs that provide the users a choice of local destinations shall be eligible for these points. Provide corroborating information with initial application
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3. Community Notification and Support (8 Points)

Points	Description
2	Local Notification: Submit a Local Official Notification form executed by a local elected official, or a local non-elected official from the planning department (or local equivalent). This document signifies local notification, and does not represent local approval or support. Applicants should follow local approval processes conditioned by local planning and zoning priorities. Maximum 2 points.
6	Community Support. Check box Two (2) points for each letter of support from local non-elected municipal officials, local elected public officials other than individuals signing Local Notification Form, local housing-related neighborhood groups, local housing authorities, or major employers. The letter(s) must not be neutral and must clearly demonstrate favorable support. The letter(s) must not be from multiple individuals from the same entity/organization. The letters(s) must not be from an official from a different jurisdiction. The letter(s) from major employers must match criteria in the Employment Center and High Need Areas scoring category. The letter(s) must be received by WHEDA no later than the application deadline date. Maximum 6 points.

4. Mixed Income Incentive (15 Points)

NOTE:

- Applicants applying in the Supportive Housing Set-Aside are prohibited from scoring points in this category.
- Applicants applying in the Preservation Set-Aside are prohibited from scoring points in this category unless designed to accommodate an existing ‘over-income’ person. Provide documentation (income-certified rent roll) with initial application.
- Applicants with scattered site developments should consult with their tax or legal counsel before selecting points in this category. See IRS Code Section 42(g) (7).

Percentage of market-rate units in development. Score 1.00 (one) point for every percentage point of market-rate units in the development as a whole, up to 15 points. Common space manager units should not be included in the total unit count (may impact the submission check)

Number of Market Rate Units		
Total Units		= XX %
Multiplied by 1.00	X 1.00	= XX Points

Example – Eight (8) market rate units divided by 60 total units = 13.33%. 13.33 x 1.00 = 13.33 rounded down to 13 points.

5. Serves Large Families (8 Points)

NOTE:

- Supportive Housing Set-Aside applications cannot score points in this category.
 - Elderly developments cannot score points in this category.
1. New construction/adaptive reuse units must
 - be 50% CMI or below AND

- have ground floor private entrances (include architect's certification with initial application)
2. The market study and the LIHTC application must clearly identify the development as "Family" to claim points.

Divide the number of three-bedroom (or larger) low-income Family units by total number of low-income units.

Remove the submission check requiring that the # of 3 BR units below equals the # of the 3 BR units on the Unit Mix page

Three-Bedroom (or Larger) Low Income Units		
Total low-income units	/	= XX%

Percentage	Points
5-10%	4
11-15%	6
16-20%	8

6. Serves Lowest Income Residents (80 Points)

NOTE:

- **Points will not be awarded in this category for developments:**
 - applying in the Preservation Set-Aside
 - for developments with federal operating subsidies
 - for developments with rental subsidies
 - for developments with federal financing unless they clearly result in the creation of new low-income units
 - for units with dedicated project-based vouchers or certificates*

Tax-exempt bond-financed developments are allowed to score points.

***Developments scoring points in Category 7 or developments applying in the Supportive Housing Set-Aside may use committed project based vouchers or other rental subsidies dedicated to supportive units as "50% CMI equivalents" for the 70 Point calculation below. These units are to be reflected as "60% CMI units" on the Unit Mix page.**

WHEDA will award points to developments with a minimum percentage of units reserved for households with incomes at 50% or less of county median income. The market study must show there is a sufficient market for the target population.

A. 70 Point Calculation: Calculate appropriate percentages and points				
Total Units for Development		Percentage of Total	Multiply Percent by Factor	Total Points
CMI Set-Aside Percentage	Number of Units @ CMI			
50%		%	X 1.00 =	
40%		%	X 1.25 =	
30% or lower		%	X 1.50 =	

Note to Applicants: The unit mix stated in the Application, and the unit mix for which points are taken above, will be reflected in the eventual Land Use Restriction Agreement for the property.

B. 10 Bonus Points

NOTE:

- **Section 8 Project Based Vouchers or other rental subsidies are not counted in this bonus section.**

B. 10 Point Bonus Check here if the application includes 10% or more 30% CMI units (Note: These units must be reflected as 30% CMI units in the Unit Mix page and eventually the LURA.)

7. Integrated Supportive Housing (20 Points)

NOTE:

- Applicants seeking to develop a senior Residential Care Retirement Complex (RCAC) under Scoring Category 8 cannot score points in this category.
- Supportive Housing Set-Aside applications cannot score points in this category.
- Points will be awarded to developments intending to provide supportive services to veterans, individuals, and to families who may require access to supportive services to maintain housing.
- No more than 25% of units may be targeted to residents with disabilities.

Score .60 point for every percentage point of targeted housing in the development as a whole, up to 15 points. Points are rounded down. Common space manager units should not be included in the total unit count.

Number of Targeted Units		
Total Units		= XX %
		= XX Points

5 Point Bonus

Check here if some or all of the supportive services will be designed to address the needs of Veterans. The applicant must submit a signed MOU with a County or Tribal Veterans Service Office or a Veteran- specific Service Provider. The MOU must describe a referral and outreach system to connect potential Veteran residents with local or State Veteran-specific services and resources

In order to score points in this category the applicant must:

1. Provide any combination of 30% CMI LIHTC units and rental subsidy assistance for the targeted units. If rental subsidies, applicant must submit firm commitments for the targeted number of units.

Example: A 24 unit development with 3 units of either 30% LIHTC units or rental assistance would score 7.0 points. (3/24 = 12.5% X 0.60 = 7.5).

Examples of allowable rental assistance include: Project-based Section 8 HAP or vouchers, operating subsidy, or capitalized operating fund or other rental subsidy assistance provided by a public housing authority or other government entity.

2. Provide a signed Appendix S Certification that the owner will cooperate with WI Department of Health Services (WIDHS) to find qualifying residents for the targeted units.

8. Elderly Assisted Living (18 Points)

NOTE:

- Supportive Housing Set-Aside applications cannot score points in this category.
- Applications that score points in category 7 cannot score points in this category.

Points will be awarded to developments intending to provide supportive services to elderly persons in a certified Residential Care Apartment Complex (RCAC).

In order to score points in this category the applicant must demonstrate to WHEDA's satisfaction the following:

- A. **Support Service Provider.** Provide to WHEDA documentation indicating experience, mission, and capacity of Service Provider(s) for the target population. Complete and attach a *Relevant Experience and Certification Service Provider* sheet. **Note:** All Service Providers must demonstrate a minimum of five (5) years experience in the field.
- B. **Service Plan.** Provide to WHEDA a Service Plan executed by both the applicant and anticipated Service Provider detailing:
 - How the services will enhance independent living success and promote the dignity of residents
 - the services that will be offered

- how the services will be funded
 - a marketing plan to insure the target population can be attracted to the development
 - how residents will be connected with a service provider if services are not provided by the owner
- C. **Design Features.** Include with initial application architect's certification this development will be built according to the requirements for State RCAC certification.
- D. **Market Demand.** The market study submitted must specifically support a sufficient market for and demand by the target population. WHEDA's Market Study Guidelines for RCACs must be followed.
- E. **County agency and/or Care Management Organization Support.** Provide to WHEDA a letter of support from the appropriate county agency or Managed Care Organization (in Family Care counties) where the development will be located indicating that:
- the proposed development and the Service Plan has been reviewed
 - the agency or organization feels there is a need is for the RCAC, and that the housing and service plan is consistent with State or local plans and policies
 - the agency or organization currently provides or will provide funding for services to residents that meet its eligibility criteria
 - the agency or organization does (or does not) have experience with the proposed service provider and, if it does have experience with the service provider, a description of that experience.

F. **Licensed CBRFs and Adult Family Homes are not eligible for credit.**

POINTS (check box)

_____ 18 points Check the box if the development and application meets all of the above criteria and intends to offer supportive services to the elderly in a certified (State of Wisconsin Administrative Code DHS 89) RCAC in at least 50% of the total development units.

9. Rehab/Neighborhood Stabilization (30 Points)

NOTE:

- **Projects scoring points in this category cannot score points in Category 16.**
- **Supportive Housing Set-Aside applications cannot score points in this category.**

Points will be awarded to applications which propose acquisition and rehab of existing single family, duplex or four-plex housing as part of a targeted, city-supported plan to stabilize neighborhoods due to vacant properties and/or foreclosure, or existing tribal housing.

Requirements:

- City or tribal support letter including 1) description of overall neighborhood plan, 2) details of financial support and 3) support for proposed property clustering.
- Minimum 24 units.
- Minimum \$25,000 per unit of hard cost rehab. Hard cost rehab is defined as the Subtotal: New Construction/Rehabilitation on the Project Cost and Credit Calculation page, less Construction of New Buildings
- New Construction allowed only if building(s) will be demolished or have been demolished in the past 24 months and is replacing like housing (no additional units). Such new construction is limited to 50% of total units
- An application's aggregate occupied units shall be automatically assumed by WHEDA to have a maximum 85% applicable fraction (i.e. assumed to have 15% over-income households) unless the applicant provides rent rolls, certifications, or other information sufficient for WHEDA to determine that a higher applicable fraction will not result in the displacement of current residents. Aggregate un-occupied units may be assumed to be 100% income qualifying.
- Applications must demonstrate a year one proforma rent increase of no more than five percent (5%) for any occupied rental units. Provide current rent schedule and explanation.
- Must show property clustering no greater than one-half (1/2) mile radius for non-tribal locations. Proposed clustering must be supported by city letter.
- Must show financial support minimum 5% of total development cost by the local government and/or private institutions or foundations.
- Unit mix may include single family homes, duplexes, tri-plexes or four-plexes but not less than 50% of the total units must be single family homes
- Application operating expenses must reflect annual replacement reserve deposit of \$400/unit minimum.

Reminder: Applicants should provide a plan addressing any proposed temporary relocation or any proposed permanent relocation of residents. The plan should meet the standards established by the federal Uniform Relocation Act (URA). WHEDA prohibits permanent displacement of residents, including those whose incomes are known to, or are estimated to, exceed tax credit maximums. WHEDA may require the reduction of applicable fractions in tax credit awards to avoid displacement of existing residents.

10. Universal Design (23 Points)

All items must be specified and certified to by an architect and attached to the initial application. Incorporated items must meet current code(s) in force for the year of the LIHTC application, complying with all Federal, State, Local and Municipal laws, codes, rules, ordinances, and regulations as they relate to the specific project.

The current building code for the State of Wisconsin is the 2009 International Building Code and the referenced standard for accessibility is ICC/ANSI A117.1-2003. References to section numbers within Universal Design are sections numbers from ICC/ANSI A117.1-2003. For complete understanding of the referenced sections, it is strongly recommended that a hard copy of ICC/ANSI A117.1-2003 be purchased from webstore.ansi.org or may be viewed online at no cost at www.publicecodes.cyberregs.com/icc/ansi/2003cc/a117p1/index.htm.

ANSI Intent Statements have been provided to give brief summaries of referenced section numbers but do not replace actual language found in ICC/ANSI A117.1-2003.

Common Area Features

Check box next to all that apply

Check Box	Points	Feature
	3	<p>Hand rails: In elderly housing only, install handrails on both sides of common hallways at all wall sections 4'0" or more in length uninterrupted by door or window openings. Handrails shall meet the requirements of Sections 505.4 through 505.9.</p> <ul style="list-style-type: none"> • Cottage style, townhouse, duplex, and single family style are not eligible for handrail points. <p><i>ANSI Intent Statement: Referenced sections specify requirements such as installed height, handrail profile, handrail clearances that comply with accessibility standards for commercial building handrails</i></p>
	3	<p>Automatic Door Openers: Provide automatic door openers at main accessible entrances to all main buildings, including entrances from accessible parking areas, per Section 404.3.</p> <p><i>ANSI Intent Statement: Doors with automatic openers are intended for individuals with mobility impairments and therefore must be designed to additional accessibility guidelines such as 32" clear opening, maneuvering clearances at either side of door, low profile threshold and control switches located beyond the arc of the door swing.</i></p>
	2	<p>Accessible Signage: Provide accessible signage for all common rooms and dwelling unit entries with visual characters per Section 703.2 and Braille characters per Section 703.4. If possible, unit entry signage shall be mounted 60" maximum above the floor to the top of the signage and located on the wall adjacent to the latch side of the door. The accessible signage requirement applies to all dwelling unit entries including units accessed by an exterior entrance such as a townhome.</p> <p><i>ANSI Intent Statement: Accessible signage follows guidelines that permit immediately recognizable information to visually impaired residents and/or visitors. These sections identify standards for text heights, text width, text contrast, sign mounting height and braille guidelines.</i></p>
	2	<p>Accessible Public Bathroom: Provide accessible public bathroom adjacent to public gathering area. This common area toilet shall have clearances that meet the requirements of Section 603.</p> <p><i>ANSI Intent Statement: The public bathroom shall follow accessibility standards for commercial buildings as the bathroom is located in a public area. The bathroom contains accessibility features such as turning space, plumbing fixture clear floor spaces, plumbing fixture heights and grab bar installation.</i></p>

Unit Features- Minimum of 20% of units, unless otherwise indicated

Check box next to all that apply

Check	

Box	Points	Feature
	3	<p>Provide a circular or T-shaped turning space per Section 304 in kitchen(s) and accessible floor level bathroom(s). Turning space shall be outside the door swing in bathrooms unless a 30" x 48" clear floor space is provided within the room beyond the arc of the door swing per Section 603.2.3 Exception 2. Sinks/vanities shall meet the requirements of Section 1003.12.4 including a height of 34" maximum above the floor with a clear floor space for forward approach.</p> <p><i>ANSI Intent Statement: Circular and T-shaped turning spaces are an invisible but useful feature of rooms used by individuals with mobility impairments. The turning space is allowed within the door swing arc in bathrooms as this room is assumed to have single occupancy. Section 1003.12.4 dictates a higher level of accessibility features at the sink because it requires forward approach which includes knee and toe clearances. To obtain these clearances, either a wall mounted sink or vanity with removable cabinets can be provided. If a removable cabinet is provided, floor and wall finishes shall extend beneath the cabinet and the removal of the cabinet shall occur without modifications of the sink.</i></p>
	3	<p>Provide standard roll-in type shower compartment per Section 608.2.2. A two inch (2") maximum raised curb is acceptable.</p> <p>Minimum 5% of total development units.</p> <p>Multi-story units will not receive these points unless:</p> <ol style="list-style-type: none"> 1) a sample floor plan is submitted to show this feature is located on an accessible floor level, AND 2) at least one bedroom is located on this accessible level floor 3) an alternative is to provide single story building(s) with units incorporating this feature <p><i>ANSI Intent Statement: A standard roll-in type shower compartments is a minimum of 30" in depth and minimum of 60" in width with shower seat on one end, shower controls on back wall adjacent to shower seat and grab bars provided on back wall and opposite the shower seat. The 2" curb language does not appear in ANSI but is allowed by this point due to the likelihood of water spilling into the bathroom on low threshold type showers.</i></p>
	2	<p>On accessible floor levels, all closet doors shall have a clear floor space of 30" x 48" minimum to allow either forward or parallel approach by wheelchair. Doors to closets that are more than 18" in depth shall provide at least 32" nominal clear opening.</p>
	2	<p>Bottom edge of mirror at all accessible floor level bathroom sink/vanities to be 40" maximum above the floor. If medicine cabinet is provided in addition to a mirror, then bottom edge shelf on the cabinet to be 44" maximum above the floor.</p>
	3	<p>All interior doors intended for user passage shall comply with Section 1003.5, which includes maneuvering clearances, thresholds, clear width, level hardware, etc.</p> <p><i>ANSI Intent Statement: The primary entrance door and other doors intended for user passage must incorporate accessibility features. It is important to avoid improperly designed door openings that do not maintain an accessible route throughout the dwelling unit. Common design flaws include a distance less than 32" between a door opened 90 degrees and the door stop, doors not maintaining proper pull or push side maneuvering clearances or the door hardware not being a lever type. The maneuvering clearances at either side of the door determined by direction of travel and are diagrammed at Figure 404.2.3.1.</i></p>
	3	<p>Garbage disposal switch, range hood controls, and electrical receptacles shall meet the requirements of Section 309. At each section of countertop uninterrupted by a sink or appliance; as long as one accessible electrical receptacle is provided then other non-accessible receptacles may also be provided.</p> <p><i>ANSI Intent Statement: Section 309 states that operable parts must be located within one of the reach ranges specified in Section 308. Within a kitchen, the obstructed side reach is the most often scenario encountered by a wheel chair user and is defined as the ability to reach a maximum of 24" over an object with the maximum height of 34" to a surface a maximum of 46" high on the far side. A common solution to bring operable parts such as switches and receptacles closer to the user is to have these items mounted on the face of the kitchen cabinets. Another available solution would be extending the operable parts such as switches and receptacles through a full height backsplash which maintains the maximum 24" distance from the face of backsplash to the lip of the counter.</i></p>
	3	<p>Provide minimum one accessible work surface that meets all requirements of Section 1003.12.3 including top of counter at 34" above the floor, minimum 30" wide, and a clear floor space for forward approach.</p>

		<p><u>ANSI Intent Statement:</u> The work surface is a kitchen design feature that would allow a wheelchair user to work at the counter with their knees beneath the working surface. Removable casework is often provided beneath the work surface but the floor and wall finishes shall extend beneath the cabinet and the removal of the cabinet shall occur without modifications to the work surface. There must be a 30" wide opening beneath the work surface when the removable cabinet is removed to allow for forward approach below the work surface.</p>
	3	<p>Entrance doors to the unit shall comply with Section 404 including delayed action closers, maneuvering clearances, low profile threshold, etc. A screen door or storm door may be added in addition to the entrance door with installation method to allow for management to remove screen door or storm door at tenant request.</p> <p><u>ANSI Intent Statement:</u> The entrance door to the dwelling unit requires additional maneuvering clearances because a closer and latch are provided at this door. The maneuvering clearances at the interior and exterior side of the door are determined by direction of travel and are diagrammed at Figure 404.2.3.1.</p>
	2	<p>Where operable windows are provided, provide at least one window in each sleeping, living, and dining space complying with all of Section 309 including the following: are easily grasped with one hand without tight grasping, pinching, or twisting of the wrist; and are located no more than 48" above the floor. Provide 30" x 48" clear floor space for forward or parallel approach centered on the window.</p> <p>Minimum 10% of total development units.</p> <p><u>ANSI Intent Statement:</u> Section 309 provides accessible design guidance on operable parts. This section is not specific to describing operable windows but has been applied to the window controls for the purpose of this point. Window locking mechanism to be within reach range and crank window must be ADA compliant style.</p>
	2	<p>Carpet shall have 1/2" maximum pile and meet all requirements of Section 302.2</p> <p><u>ANSI Intent Statement:</u> Flooring properties are an important factor to those with mobility impairments as they should not restrict movement of a wheelchair or provide tripping hazards at flooring transitions. Carpet pile is limited to 1/2 inch maximum in height. Transitions over 1/4 inch in height and less than 1/2 inch shall be beveled.</p>
	1	<p>All unit light switches shall be Rocker type light switches.</p>

Items below only available for Acquisition/Rehab and Preservation projects – points for the following items will not be awarded to Adaptive Reuse projects

Minimum of 20% of developments total units, unless otherwise indicated

Check Box	Points	Feature
	2	<p>Provide all bathtubs/showers with offset controls and a 30" x 48" clear floor space for parallel approach. Where the centerline of the controls is between 18" and 9" from the open face of the bathtub/shower compartment, the clear floor space in front of the fixture shall extend at least 9" beyond the control wall. Where the centerline of the controls is between 9" and 0" from the open face of the bathtub/shower compartment, the clear floor space in front of the fixture shall extend at least 5" beyond the control wall.</p>
	1	<p>Electrical outlets and cable/data outputs set to a minimum height 18" above the floor</p>
	1	<p>Thermostats, primary electrical box and light switches set to a maximum height of 48" above the floor.</p>
	1	<p>Water supply and drain pipes under lavatories and sinks shall be insulated or otherwise configured to protect against contact.</p>
	3	<p>100% visitable units. Provide an accessible route from accessible parking stalls to all dwelling units. Accessible routes shall meet all requirements of Section 402 including Section 404 for accessible doors. The living room, kitchen and minimum of one bathroom (with a minimum of a toilet and sink) must be on the accessible route from the unit entry. Bathroom shall meet the requirements of Sections 1004.11.</p> <p><u>ANSI Intent Statement:</u> An accessible route is defined by walking surfaces not steeper than 1:20 ramps, curb ramps excluding flared sides, elevators and platform lift. Once the resident or visitor arrives at the dwelling unit, the unit doorway and path connecting the living room, kitchen and one bathroom shall have proper maneuvering clearances on either side of the doorway. The kitchen is required to have turning space but is not required to have other accessibility features such as 34" high counters or accessible work spaces by this point item.</p>

		<i>Section 1004.11 is lengthy and should be read carefully as there are two bathroom options that may not be intermixed. Under either option turning space, fixture clear floor spaces, reinforcement for future grab bars must be provided</i>
	2	Toilets in units shall have clearances that meet requirements of Section 1004.11.3.1.2.1, 1004.11.3.1.2.2, or 1004.11.3.1.2.3. <i>ANSI Intent Statement: All sections referenced are describing the various clearance options at the toilet and are diagramed at Figure 1004.11.3.1.2 for easier reference. Section 1004.11.3.1.2.1 describes a parallel approach measuring 56" deep by 48" wide. Section 1004.11.3.1.2.2 describes a forward approach measuring 66" deep by 48" wide. Section 1004.11.3.1.2.3 describes a parallel or forward approach measuring 56" deep by 60" wide.</i>
	2	Low-profile thresholds - All changes in level within common areas and in dwelling units to be 1/4" maximum vertical or 1/2" maximum beveled at 1:2 per Sections 303.2 and 303.3. <i>ANSI Intent Statement: Transitions at doorways or flooring surfaces present tripping hazards. Figure 303.3 provides a good diagram for the acceptable threshold profiles.</i>
	2	Provide reinforcement for the future installation of grab bars at toilets, bathtubs, and shower compartments per Section 1003.11.4. If walls are not being opened up to allow for installment of the reinforcement, a face plate installation for the toilet grab bar(s) would be an acceptable substitution. For bathtubs and shower compartments if there is not existing reinforcement in place within the wall structure, these features must be replaced with new compartments that have the reinforcement included. <i>ANSI Intent Statement: Reinforcement for installation of grab bars allows a resident an opportunity for safety within the bathroom while not incurring the initial cost of installing grab bars and shower seats in every dwelling unit.</i>
	1	Bathroom/shower compartment permanently lined with non-skid surface or pattern covering 75% of floor.

Sum of Checked Items	Maximum Total Points
34 and Over	23
27-33	18
21-26	13
14-20	8
6-13	4

11. Financial Participation (25 Points)

NOTE:

- **Projects submitting applications in the Preservation Set-Aside will only be allowed to score points on new unaffiliated financing.**

Points will be awarded for various types of unaffiliated financial participation or cost reductions, which specifically benefit this development, that are secured by the applicant.

Eligible cost reductions must be provided by local government.

There are two options for points:

1. Points will be awarded by dividing the financial participation amount by the total development costs. Score one (1) point for every percentage point of financial participation.

AND/OR

2. Points will be awarded by dividing the dollar amount of qualified cost reductions by the total development costs plus the cost reductions. Score one (1) point for every percentage point of Cost Reduction.

Examples of the types of financial participation and/or cost reductions include, but are not limited to, the following:

- The local government funds on-site project costs by providing HOME, CDBG funds or other financial resources in the form of loans, grants, or a combination thereof.

- The local government creates a quantifiable reduction of on-site project development costs specifically for this project. Examples of quantifiable reduction of on-site
- development costs include: waiver of water or sewer fees, waiver of building permit fees or other government development fees, waiver of impact fees, donation or waiver of project specific assessment or infrastructure costs, provides reduction of purchase price for land or buildings as compared to assessed or appraised value or provides demolition and removal of existing structures at no/reduced cost. Note: If using demolition of existing structures for points, then no points for reduction of purchase price will be included.
- USDA RD Section 515 financing in the form of a loan
- Federal Home Loan Bank AHP funds in the form of a loan. NAHASDA funding in the form of a loan. Provide copy of commitment to lend from recipient of NAHASDA funds to the LIHTC ownership entity (i.e. LLC) with specific terms (i.e. interest rate, term, amortization, repayment). Must meet loan criteria.
- Cash donations or grants from any of the above named entities.
- Loans, grants or cash donations made by area employer(s)
- Tax-exempt bond financing
- TIF financing in form of a grant or loan. Provide copy of Developer Agreement or Common Council approval.

Note: A Payment in Lieu of Taxes (PILOT) agreement with a Local Government does not qualify for points in this category.

Guidelines under which points will be awarded:

To receive points in this category, written, fully executed, conditional funding commitments must be submitted with the application to document any points claimed.

All funding commitments must include the type of funding (grant/ loan or cash donation), amounts, terms and conditions of all funding. Commitments that include the terms "may" or "intend" will not be acceptable for scoring purposes of this category.

- A. Funding or project cost reductions must be documented in the form of a written commitment.
- B. Funding can be in the form of a loan, grant, or cash donation, or municipal cost reduction.
- C. Loans must have these characteristics:
 1. Minimum term of ten (10) years and fully amortizing, or minimum fifteen (15) years if not fully amortizing.
 2. Must be at a rate equal to, or less than, the Long Term Applicable Federal Rate (compounded annually).
 3. Origination fees may not exceed 2.5%.
 4. Bifurcated loans must use blended rate to meet long term applicable federal rate (compounded annually) criteria.
- D. All loans, grants or cash donations must be included as a source of funding for the development on the application. If cash donations or grant funding will be paid in multiple years, only the initial year funding will be included in the point scoring.
- E. All Local Government contributions which provide a quantifiable reduction of on-site development costs must be identified in the application and be linked to this affordable housing proposal. The point calculation for "quantifiable reductions" shall be: cost reduction divided by (cost reduction plus application total development cost).
- F. "Local government" includes the city, town, village or county where the proposed development will be located.
- G. Applicants must provide a letter from the appropriate representative of the Local Government certifying the Local Government's contribution and/or actions that create a quantifiable reduction of on-site development cost. The "appropriate representative" of the Local Government would include the person or person(s) that have the authority to sign such a commitment. That person may include the mayor, common council president, or department head, etc. The letter must clearly show the types, amounts, value or terms and conditions of such contributions and/or quantifiable reductions.
- H. Commitments may contain conditions, but only within control or based upon the performance of the borrower, not the local government or other provider.
- I. If claiming Historic Tax Credit, submit a) written evidence that historic designation (Part I) has been applied for, or that the building is already deemed historic, and b) letter of interest by investor, and c) detailed calculation of the credit and equity amounts. Points are calculated on the lower of the Credit, or the equity from sale of the credit. The letter must acknowledge that the price of the State credit reflects the net price after any income tax liability incurred from the sale of the credit.
- J. Tax Increment Financing (TIF)
 - must submit municipal approval of TIF
 - If developer financed remit copy of firm commitment from Financial Institution mirroring terms of municipality

Qualified Financial Participation

Dollar Amount of Qualified Financial Participation	
Application Total Development Cost	/
Percentage Points	=

Cost Reduction

Dollar Amount of Qualified Cost Reductions	
Cost Reductions + Total Development Cost	/
Percentage Points	=

12. Ownership Characteristics (Maximum of 6 Points)

For properties requesting points for tax-exempt ownership, WHEDA expects that the Tax Exempt Organization will have at least 51% ownership of the Managing Member LLC and significantly participate in the project from the development stage throughout the 15 year compliance period. The MOU must reflect that the Tax Exempt Organization will have significant participation including but not limited to voting rights and cash flow. The MOU must also reflect 51% ownership of the general partner, but does not necessarily need to reflect the Tax Exempt Organization having 51% rights to cash flow, development fee, or other financial aspects of the project. However, WHEDA has the expectation that the Tax Exempt Organization will be appropriately compensated for their direct involvement or costs associated with the project.

Check Box	Points	Item
	6	<p>Developments where the controlling entity (managing member or general partner) is at least 51% owned and controlled by a member of an ethnic minority group as defined by the Wisconsin Department of Transportation, "Minority Business Enterprise Certification Program" found at http://www.dot.wisconsin.gov/business/mbe.</p> <ol style="list-style-type: none"> 1. Controlling entity must have acceptable previous experience in the development and/or operation of housing similar to that proposed in the application, or is recent graduate of WHEDA's Development Training Program, Marquette University's Associates in Commercial Real Estate program (or an equivalent program at another educational institution). 2. Attach evidence of previous experience. 3. Attach the actual Minority Business Enterprise Certificate. 4. Attach a development operating agreement or MOU document reflecting that the Minority Business has at least 51% stake in all aspects of the development including but not limited to ownership, cash-flow, and voting rights. 5. Either the Developer or Co-Developer listed in application must be the Minority Business Enterprise. <p>Please name the ethnic minority group for the member (i.e. Native American, Black, Hispanic, Asian Indian, Asian Pacific, Aleut, Eskimo, or Native Hawaiian)::</p>
	3	<p>Developments where the controlling entity (managing member or general partner) is at least 30% owned and controlled by a member of an ethnic minority group as defined by the Wisconsin Department of Transportation, "Minority Business Enterprise Certification Program" found at http://www.dot.wisconsin.gov/business/mbe.</p> <ol style="list-style-type: none"> 1. Controlling entity minority member must have acceptable previous experience in the development and/or operation of housing similar to that proposed in the application, , or is recent graduate of WHEDA's Development Training Program, Marquette University's Associates in Commercial Real Estate program (or an equivalent program at another educational institution). 2. Attach evidence of previous experience for the member. 3. Attach a development operating agreement or MOU document reflecting that the minority member has at least 30% stake in all aspects of the development including but not limited to ownership, cash-flow, and voting rights.

		Please name the ethnic minority group for the member (i.e. Native American, Black, Hispanic, Asian Indian, Asian Pacific, Aleut, Eskimo, or Native Hawaiian):
	6	<p>The controlling entity (managing member or general partner) is at least 51% owned and controlled by a tax-exempt organization (including local governments, public housing authorities or Tribal Authorities) with acceptable previous experience in the development and/or operation of housing similar to that proposed in the application.</p> <ol style="list-style-type: none"> 1. Attach evidence of previous experience. 2. Attach a copy of the partnership agreement or MOU (Memorandum of Understanding) addressing who has direct control, and to what extent, as well as who has the ultimate decision-making responsibility for the entity. The Tax Exempt Organization must have at least 51% stake in all aspects of the development including but not limited to ownership.

Minority and/or tax exempt entity and ownership percentage must be reflected in Ownership Entity section of the Application in order to receive points in this category (Example: reflect that the tax exempt or minority member has a minimum 0.051% ownership interest in the Managing Member)

13. Eventual Resident Ownership (3 points)

NOTE:

- **Supportive Housing Set-Aside applications cannot score points in this category**
- **Points are limited to developments designated as BOTH (1) family and (2) single family detached style construction.**

100% of the development is intended for eventual resident ownership. A Resident Homeownership Plan must be submitted with initial application. The plan must incorporate an exit strategy, including how units will be marketed and sold to the eventual resident owner, as well as detailing the provision of services including home ownership education, training, and down payment assistance.

The Resident Homeownership plan must include the following:

- Anticipated tenant qualifications
- Pre-purchase homeownership and financial counseling services to be provided
- Estimated timelines for transition to ownership
- Estimated affordable purchase price of units – Show methodology. Use WHEDA's Affordable purchase price limits
- Detail any down payment assistance that will be offered to the residents – for example, will any part of the monthly rent be reserved for down payment assistance?

Release of the LURA after the expiration of the compliance period will be subject to WHEDA's review at that time regarding the above, as well as tenant protection, continued affordability, and review of a Capital Needs Assessment (CNA).

Failure to provide any required element of the Resident Homeownership Plan will result in no points.

14. Development Team (50 Points)

Applicants must document Development Team strength and experience. Please refer to appropriate appendix (Development Team) for detailed factors that will be considered by WHEDA in evaluating the Development Team. Applicants are encouraged to consult with WHEDA staff regarding documentation in advance of submitting their application.

FOR INFORMATIONAL PURPOSES ONLY - SCORING WILL BE COMPLETED BY WHEDA

Note: Developer Scoring will be done based on scores of the Primary Developer and the Co-Developer (if any). WHEDA will use the higher of the following:

- **The Primary Developer individually**
- **The average scores of the Primary Developer and Co-Developer**

Developer Quality Scoring	Available Points
Experience	
<ul style="list-style-type: none"> Years of Multifamily/Section 42 Experience Documented 	
Below Average/None	1
Satisfactory/Average	2
Superior	3
<ul style="list-style-type: none"> Quality/Success of Projects 	
Below Average	2
Satisfactory	3
Above Average	4
Superior	5
Market (Product-type) Familiarity	
Below Average	2
Satisfactory	3
Above Average	4
Superior	5
Market (Geographic) Familiarity	
Below Average	2
Satisfactory	3
Above Average	4
Superior	5
Understanding of Tax Credit Process	
Below Average	2
Satisfactory	3
Above Average	4
Superior	5
Ability to Bring Strong Players Together	
Below Average	2
Satisfactory	3
Above Average	4
Superior	5
Non-Performance Deduction	
<ul style="list-style-type: none"> WHEDA reserves the right to deduct up to 15 points for non-compliance with a previous LIHTC award's representation of scope, support services, design, energy efficiency, amenities, score or certifications. 	
Total Developer Quality Points	28

Management Agent Quality Scoring	Available Points
Compliance History	
Below Average	2
Satisfactory	4
Above Average	5
Superior	6
Vacancy History	
Portfolio more than 10% vacant	3
Portfolio 7-10% vacant	4
Portfolio 5-7% vacant	5
Portfolio less than 5% vacant	6
Property Condition	
Below Average	2
Satisfactory	3
Above Average	4
Superior	5
Capacity/Experience	

Below Average	2
Satisfactory	3
Above Average	4
Superior	5
Total Management Agent Quality Points	22

15. Readiness to Proceed (15 Points)

Zoning Status: Permissive zoning in place for the type of development proposed.

- o Final plan approval not required.
- o Conditional Use Permit, if required- provide copy of approval/issuance

If the zoning for a property requires that the site also contain commercial space, applicant to provide documentation describing how the commercial space will be constructed and financed.

16. Credit Usage (40 Points maximum)

NOTE:

- **If requesting points in Category 9 - Rehabilitation/Neighborhood Stabilization application cannot score points in this category.**

Credit Per Low-Income Unit (40 Points maximum for new construction and adaptive reuse). WHEDA will award points to developments requesting relatively fewer credits per low income unit produced, as calculated in Application One. For properties containing a mix of Acquisition/Rehab units and New Construction or Adaptive Reuse units, a Credit Usage score will be calculated for the for properties the Acquisition/Rehab units and New Construction or Adaptive Reuse units, with the lessor of the two being used as the application score for this category.

For properties in a Qualified Census Tract, which also includes a job/skill training center or employment counseling center (or similar facilities) as a Community Service Facility, WHEDA will exclude the credits attributable to the Community Service Facilities from the Credit Usage calculation. Applicants should include an attachment that clearly identifies the costs, basis and LIHTCs attributable to the Community Service Facilities. WHEDA expects that the per-square-foot cost of the Community Service Facilities will be significantly below the per-square-foot costs for the residential portion of the property. Include an executed Memorandum of Understanding between the property owner and the operator of the Community Service Facility which describes the use of the property, operational expectations, etc.

Total LIHTCs Requested	
LIHTCs Attributable to Community Service Facilities	
LIHTCs Attributable to Residential Areas	
Total Building Square Footage	
Total Community Service Facilities Square Footage	
Credit Allocated to New Construction and Adaptive Reuse Units	
Credit Allocated to Acquisition/Rehab Units	
Total	

Acquisition Rehab	
Credit per Unit	Points
\$6,410 or less	30
\$6,411 to \$6,960	25
\$6,961 to \$7,510	20
\$7,511 to \$8,060	15
\$8,061 to \$8,610	10
More than \$8,610	0

New Construction and Adaptive Reuse	
Credit per Unit	Points
\$11,700 or Less	40
\$11,701 to \$12,215	34
\$12,216 to \$12,730	30
\$12,731 to \$13,245	26
\$13,246 to \$13,760	22
\$13,761 to 14,275	18
\$14,276 to \$14,790	14
\$14,791 to \$15,305	10
More than \$15,305	0

NOTE: The unit mix used below **MUST MATCH** the Unit Mix page of the application. The Credit-per-Unit calculation for the proposed unit mix will be adjusted to reflect the bedroom sizes of the low-income unit mixes. The "Weighted Credit-per-Unit" value will be used to determine points.

Examples of different projects and their "Weighted Credit-per-Unit" values:

	Efficiency	1-br	2-br	3-br	4-br	LI Units	Weighted Units	Credit Request	Credit Per Unit	Credit Per Weighted Unit
Weights	0.72	0.82	1.00	1.29	1.42					
Project 1 - All 2BR Units			50			50	50.0	600,000	12,000	12,000
Project 2 - All 1BR Units		50				50	41.0	550,000	11,000	13,414
Project 3 - All Efficiencies	50					50	36.0	500,000	10,000	13,888
Project 4 - All 3BR Units				50		50	64.5	650,000	13,000	9,923
Project 5 - All 4BR Units					50	50	71.0	750,000	15,000	10,563

18. Employment Centers and High Need Areas (20 Points)

Note:

- Preservation Set-Aside applications cannot score points in this category.

Points will be awarded to developments which are 1) located proximate to employment centers and 2) located in market areas with high occupancy and where a housing/employment imbalance exists. Awarding of these points does not necessarily imply WHEDA approval of the market, unit mix, rents, or site.

WHEDA may, at its own discretion, award points using other information it deems relevant, including: existing affordable/market rental stock, occupancy data, commuting and employment patterns, major employment center expansion, etc.

In the event that an applicant did not receive a credit award in 2015, and is resubmitting the same site in 2016 – if the tract was located in an Employment Centers and High Needs Area in 2015, but is not identified as an Employment Centers and High Needs Area in 2016, points will be awarded to that application in this category in 2016.

Check Box	Points	Description
	10	<p>Employment Centers – Points will be awarded to:</p> <ul style="list-style-type: none"> • Developments which are located within one mile of a major employer or employment center (500+total employees) which demonstrates support of the development via support letter(s). • Employer letters must use the word “support”, may be signed by any senior official or department head (but not an external person or entity), describe the approximate number of employees and state that the employer’s total employment base has either remained stable or increased in the last two years. Future employee growth will not be counted unless supported by a public announcement. Locations meeting WHEDA QAP Rural criteria: 100+ employees and generally no greater than two miles. <p>OR</p> <ul style="list-style-type: none"> • Developments which are located in or one-half (1/2) mile or less from identified Employment Center census tracts. These tracts display strong employment opportunities relative to the state as a whole. This will be determined by U.S. Census data (American Communities Survey) by census tract. WHEDA will publish the list of areas eligible for these points each year on WHEDA.com.
	10	<p>High Need Areas – Points will be awarded to:</p> <ul style="list-style-type: none"> • Applicants that demonstrate they are the successful respondent to a city or local competitive RFP/RFQ to develop a project on publicly owned land within the RFP/RFQ specified timeframe (must meet LIHTC time requirements for the credit allocation). There cannot be an identity of interest between the issuer and awardee. Applicants must submit a copy of the RFP/RFQ along with the award notification from the issuer. <p>OR</p> <ul style="list-style-type: none"> • Developments which are located in or one-half (1/2) mile or less from WHEDA-determined areas with high occupancy and where data suggests a severe housing need or imbalance exists between housing and employment opportunities. The following conditions must exist to be awarded points: <ol style="list-style-type: none"> 1. The market study must conclude that all proposed LI unit rents are 10% or more below local comparable market rents. See Market Study Guidelines for definitions. 2. Development is located in or one-half (1/2) mile from identified High Need Census Tracts. WHEDA will publish the list of high need areas eligible for these points each year on WHEDA.com. This list will generally be determined by U.S. Census data (American Communities Survey) by census tract.