

**2019 Housing Tax Credit (HTC) Program
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 score in the Areas of Economic Opportunity scoring category will be ranked the highest. A secondary tiebreaker, if needed, will rank applications by the amount of housing tax credits per affordable unit.

All developments must score at least 120 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.

| Scoring Category | Max Points |
|--|------------|
| 1. Lower-Income Areas | 5 |
| 2. Energy Efficiency and Sustainability | 32 |
| 3. Mixed-Income Incentive | 12 |
| 4. Serves Large Families (Three-bedroom or larger units) | 5 |
| 5. Serves Lowest-Income Residents | 60 |
| 6. Supportive Housing | 20 |
| 7. Rehab/Neighborhood Stabilization | 25 |
| 8. Universal Design | 18 |
| 9. Financial Leverage | 40 |
| 10. Eventual Tenant Ownership | 3 |
| 11. Project Team | 12 |
| 12. Readiness to Proceed | 12 |
| 13. Areas of Economic Opportunity | 28 |
| 14. Rural Areas Without Recent HTC Awards | 5 |
| 15. Location Points (only for 4% applications) | 35 |

1. Lower Income Areas (5 points)

Five points will be awarded for:

- a) Properties in a QCT that have a Concerted Community Revitalization Plan (CCRP) that specifically addresses the need for affordable and/or rental housing in the area of the proposed HTC project
 - a. Attach a print-out of census tract from American Fact Finder or similar program
 - b. Provide the website location for the CCRP or provide a hard copy of the plan
 - c. Concerted Community Revitalization Plan requirements:
 - i. Is geographically specific (the proposed HTC development must be within the identified planning area)
 - ii. Includes a strategy for obtaining commitments of public and private investment for infrastructure, amenities, or services beyond the proposed HTC development
 - iii. Clearly demonstrates the need for revitalization in the planning area
 - iv. Includes elements such as setting outcome goals, timelines and benchmarks, and identification of community partners
 - v. Plan must have been completed within the past 15 years
- b) Properties located on federally designated Tribal lands

Three points will be awarded for:

- a) Properties in a QCT that have a CCRP
 - a. Attach a print-out of census tract from American Fact Finder or similar program
 - b. Provide the website location for the CCRP or provide a hard copy of the plan
 - c. Concerted Community Revitalization Plan requirements:
 - i. Is geographically specific (the proposed HTC development must be within the identified planning area)
 - ii. Includes a strategy for obtaining commitments of public and private investment for infrastructure, amenities, or services beyond the proposed HTC development
 - iii. Clearly demonstrates the need for revitalization in the planning area
 - iv. Includes elements such as setting outcome goals, timelines and benchmarks, and identification of community partners
 - v. Plan must have been completed within the past 15 years

2. Energy Efficiency and Sustainability - Maximum Score (32 Points)

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

| Points | Description | | | | |
|--|---|-------------------------|----------|--|----------|
| 20 | <p>Sustainable Design</p> <p>Properties built to the Wisconsin Green Built Home Standard (score of 150 or more) or those meeting the Enterprise Green Communities Criteria are eligible to receive 20 points in this category.</p> <p>Certification that the Wisconsin Green Built Home of Enterprise Green Communities program requirements have been met will be required prior to release of 8609s.</p> | | | | |
| | <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> <p>Sites meeting the Rural Set-Aside definition:</p> <table style="width: 100%; border: none;"> <tr> <td style="padding-left: 20px;">Walk Score 60 and above</td> <td style="text-align: right;">4 points</td> </tr> <tr> <td style="padding-left: 20px;">Walk Score between 40-59 or site on Tribal Lands</td> <td style="text-align: right;">2 points</td> </tr> </table> | Walk Score 60 and above | 4 points | Walk Score between 40-59 or site on Tribal Lands | 2 points |
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| Walk Score between 40-59 or site on Tribal Lands | 2 points | | | | |

| | | | | | |
|--------------------------|---|-------------------------|----------|--------------------------|----------|
| | <p>All Other sites:</p> <table border="0"> <tr> <td>Walk Score 70 and above</td> <td>4 points</td> </tr> <tr> <td>Walk Score between 50-69</td> <td>2 points</td> </tr> </table> <p>Find "Walk Score" value by visiting www.walkscore.com and typing in the project address. 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 70 and above | 4 points | Walk Score between 50-69 | 2 points |
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| Walk Score between 50-69 | 2 points | | | | |
| 4 | <p>Public Transportation</p> <p>Points will be awarded to developments located in which any portion of the site is no more than one-half (0.5) 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</p> | | | | |
| 4 | <p>Non-Smoking</p> <p>Properties designated as non-smoking and evidenced in "house rules" or lease would be eligible to receive up to 4 points in this category.</p> | | | | |

3. Mixed Income Incentive (12 Points)

NOTE:

- Applicants applying in the Supportive or Rural Housing Set-Asides are prohibited from scoring points in this category.
- Applicants applying in the Preservation Set-Aside are prohibited from scoring points in this category
- 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 0.80 points for every percentage point of market-rate units in the development as a whole, up to 12 points. Common space manager units should not be included in the total unit count.

| | | |
|-----------------------------|--------|-------------|
| Number of Market Rate Units | | |
| Total Units | | = XX % |
| Multiplied by 0.80 | X 0.80 | = XX Points |

4. Serves Large Families (5 Points)

NOTE:

- Supportive Housing Set-Aside applications cannot score points in this category.
 - Majority elderly developments cannot score points in this category, unless the property includes family units located in a separate building (or buildings) on the **same site** as the elderly units.
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 HTC 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.

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

| Percentage | Points |
|----------------|--------|
| 5-10% | 1 |
| 11-15% | 3 |
| 16% or greater | 5 |

5. Serves Lowest Income Residents (60 Points)

Points will not be awarded in this category for developments applying in the Preservation Set-Aside.

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

Applications will be allowed to score points in this category for new construction projects covered by operating or rental subsidies.

**Developments using committed project based vouchers or other rental subsidies as "50% CMI equivalents" for the 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.

| Total Units for Development | | | | |
|-----------------------------|-----------------------|---------------------|----------------------------|--------------|
| CMI set-aside Percentage | Number of Units @ CMI | Percentage of Total | Multiply Percent by Factor | Total Points |
| 50% | | % | X 0.86 = | |
| 40% | | % | X 1.07 = | |
| 30% or lower | | % | X 1.29 = | |

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.

6. Integrated Supportive Housing (20 Points)

Notes:

- 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 0.75 points 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 % |
| | X 0.75 | = 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 HTC 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 4 units of either 30% HTC units or rental assistance would score 12.0 points. (4/24 = 16.67% X 0.75 = 12.5).

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.

7. Rehab/Neighborhood Stabilization (25 Points)

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

WHEDA will limit the number of Rehab/Neighborhood Stabilization awards to one per year in any city, and no more than one to any developer.

Note: Supportive Housing Set-Aside applications cannot score points in this category

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 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 unoccupied units may be assumed to be 100% income qualifying.
- Applications must demonstrate a year one pro forma 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, triplexes or fourplexes 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 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 fraction in tax credit awards to avoid displacement of existing residents.

8. Universal Design (18 Points)

All items must be 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 HTC 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 2015 International Code Council (ICC) and the referenced standard for accessibility is ICC/ANSI A117.1-2009. References to section numbers within Universal Design are sections numbers from ICC/ANSI A117.1-2009. For complete understanding of the referenced sections, it is strongly recommended that a hard copy of ICC/ANSI A117.1-2009 be purchased may be viewed online at no cost at www.https://codes.iccsafe.org/public/document/toc/559/

ANSI Intent Statements have been provided to give brief summaries of referenced section numbers but do not replace actual language found in ICC/ANSI A117.1-2009.

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> |

**2019 Housing Tax Credit (HTC) Program
Self-Scoring Exhibit**



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. Water supply and drain pipes under lavatories and sinks shall be insulated or otherwise configured to protect against contact.</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 wheelchair 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><i>ANSI Intent Statement: 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.</i></p> |
| | 3 | <p>Entrance doors to the unit shall comply with Section 404 including delayed action closers, maneuvering clearances, low profile threshold, and door hardware. 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><i>ANSI Intent Statement: 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 404.2.3.2.</i></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><i>ANSI Intent Statement: 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.</i></p> |
| | 2 | <p>Carpet shall have 1/2" maximum pile and meet all requirements of Section 302.2.</p> <p><i>ANSI Intent Statement: 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.</i></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</p> |

**2019 Housing Tax Credit (HTC) Program
Self-Scoring Exhibit**



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|--|---|--|
| | | of the bathtub/shower compartment, the clear floor space in front of the fixture shall extend at least 5" beyond the control wall. |
| | 3 | Electrical outlets and cable/data outputs set to a minimum height 18" above the floor |
| | 3 | Thermostats, primary electrical box and light switches set to a maximum height of 48" above the floor. |
| | 2 | 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. <i><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. 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> |
| | 1 | Toilets in units shall have clearances that meet requirements of Section 1004.11.3.1.2 <i><u>ANSI Intent Statement:</u> 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 1004.11.3.1.2.2.2 describes a parallel approach measuring 56" deep by 48" wide. Section 1004.11.3.1.2.2.3 describes a forward approach measuring 66" deep by 48" wide. Section 1004.11.3.1.2.2.1 and 1004.11.3.1.2.2.4 describes width and vanity overlap.</i> |
| | 3 | 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><u>ANSI Intent Statement:</u> 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 1003.11.1. 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><u>ANSI Intent Statement:</u> 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> |
| | 2 | 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 | 18 |
| 27-33 | 14 |
| 21-26 | 10 |
| 14-20 | 6 |
| 6-13 | 3 |

9. Financial Leverage (40 points)

Points will be awarded based on the housing tax credit equity as a percentage of the total development budget.

| | |
|----------------|-----------|
| Less than 50% | 40 points |
| 50.1% to 53.0% | 35 points |
| 53.1% to 56.0% | 30 points |
| 56.1% to 59.0% | 25 points |
| 59.1% to 62.0% | 20 points |
| 62.1% to 65.0% | 15 points |
| 65.1% to 68.0% | 10 points |
| 68.0% to 75.0% | 5 points |
| Above 75% | 0 points |

| | |
|--|-------|
| Housing Tax Credit Equity | |
| Total Development Budget | / |
| Housing Tax Credit Equity as % of Total Development Budget | = XX% |

10. 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.

11. Development Team (12 Points)

For informational purposes only – scoring will be completed by WHEDA. See Appendix P for Development Team scoring definitions.

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

Development Team

- A. Successful completion of HTC properties (as lead developer)
 - a. Four or more properties in Wisconsin or more than 10 HTC properties in all states (2)
 - b. Two or more properties in Wisconsin or more than five HTC properties in all states (1)
- B. Years of HTC and multifamily experience
 - a. Six years of development experience and four years of HTC experience (2)
 - b. Four years of development experience and three years of HTC experience (1)
- C. Performance of HTC properties (minimum of three properties or 100 units as lead developer)
 - a. Average physical occupancy above 96% during the past three years (3)
 - b. Average physical occupancy above 94% during the past three years (2)
 - c. Average physical occupancy above 92% during the past three years (1)
- D. WHEDA evaluation of capacity, delivery of prior HTC properties and timely & accurate completion of prior HTC applications and awards (3 points)

Development team members (maximum of 2 points)

- A. 2 points will be awarded for applications that include a Nonprofit organizations, acting as Developer and an Owner, that meets the requirements for applicants in the Nonprofit Set-Aside
- B. One point will be awarded for applications that include an organization, acting as lead Developer and an Owner, that has participated in four or fewer HTC properties as a lead developer or owner

Co-developers for properties owned by Public Housing Authorities or Tribal Housing Authorities will not be required to have an ownership role in the property.

WHEDA will continue to reserve the right to deduct up to 12 points for non-compliance with a previous HTC award's representation of scope, support services, design, energy efficiency, amenities, score, certifications, or nonpayment of fees.

12. Readiness to Proceed (12 Points)

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

- o Final plan approval not required.

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.

13. Areas of Economic Opportunity (28 Points)

Up to five points will be awarded for items A-E immediately below (limited to a maximum of 20 points). A list of census tracts/school districts/counties that qualify for Median Income, Unemployment, DPI Accountability Score, High Needs Area and Rent Burden points can be found in Appendix R.

- A. Median Income in the Census Tract
- B. Unemployment Rate in the Census Tract
- C. Located in a school district in the top 25% of the Wisconsin Department of Public Instruction’s most recent Overall Accountability Score
- D. Located on Federally-designated Tribal Lands, in an area identified by WHEDA as a ‘High Need’ area, or successful respondent to a city or local competitive RFP/RFQ.
 - o RFP/RFQ Notes:
 - Applicants must demonstrate they are the successful respondent to a city or local competitive RFP/RFQ to develop a project on publicly-controlled land within the RFP/ RFQ specified timeframe (must meet HTC 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.
 - Maximum of two RFPs/RFQs per municipality. If a municipality has more than two RFP/RFQ selections, only the two highest scoring WHEDA applications will receive these points
 - o For those applications that did not receive credit in 2016, and are being resubmitted in 2017 – High Need Areas points will be awarded in 2017 if those points were awarded in 2016.
- E. Counties in which the average rental household is paying more than 30% of income towards rental expenses

Access to services and amenities (maximum of 10 points)

- A. Properties will receive one point for proximity to key services and amenities
 - o Sites on Tribal Land : points will be awarded for amenities and services within 4.0 miles
 - o Sites meeting WHEDA’s Rural Set-Aside definition: points will be awarded for amenities and services within 2.0 miles
 - o All other areas of the state: points will be awarded for amenities and services within 1.0 mile

| Item | Senior | Family/Supportive |
|---|--------|-------------------|
| Full Service Grocery Store – stores providing fresh meat, produce and dairy ¹ (2 points) | X | X |
| Public Elementary, Middle or High School | | X |
| Senior Center (2 points) | X | |
| Full Service Medical Clinic or Hospital ² | X | X |
| Library | X | X |
| Public park with playground equipment or athletic facilities, or hiking/biking trail | X | X |
| Job-Training Facility, Community College or Continuing Education Programs | X | X |
| <i>On-site services and amenities</i> | | |
| In-unit internet at no cost to residents (2 points) | X | X |
| On-site community room dedicated for residents | X | X |

¹ A convenience store does not meet the definition of full service grocery store

² A specialty medical clinic (such as podiatrist or ophthalmologist), diagnostic lab, nursing home or hospice facility does not meet the definition of full service medical clinic or hospital

14. Rural Areas Without Recent HTC Awards (5 points)

Five points will be awarded to applications in counties that have not received a 9% Housing Tax Credit award in the past three years.

15. Location Points (35 points - this category is only available for 4% applications)

Up to 35 points will be awarded for 4% HTC applications based on the site of the proposed development:

1. Properties located in areas meeting (a) USDA's Rural Development Property Eligibility Criteria, (b) the Census Bureau definition of non-metropolitan counties, and (c) within a Treasury-designated Opportunity Zones will receive 35 points
2. Properties located in areas meeting (a) USDA's Rural Development Property Eligibility Criteria, (b) the Census Bureau definition of non-metropolitan counties will receive 25 points
3. Properties located in areas meeting USDA's Rural Development Property Eligibility Criteria will receive 15 points
4. Properties outside of the cities of Milwaukee and Madison that do not meet any of the criteria in (1-3) above will receive 10 points