



Print Preview - ApplicationOne
THIS PRINT PREVIEW IS NOT A FINAL APPLICATION
Tax Credits

Project Name and Location

Project Name:

Address:

City: County: Zip:

Census Tract: Difficult Development Area

Is project in a Qualified Census Tract?

Does a community revitalization plan exist?

Is project in a Difficult Development Area?

Political Jurisdiction:

Jurisdiction CEO Name: First: Last: Title:

Jurisdiction Address:

Jurisdiction City: Zip:

Jurisdiction Phone: E-Mail Address:

Project Description

Project Type: New Construction Rehab Adaptive Reuse

Is this an application for additional credit?

If yes, list name of project and WHEDA application number: _____

Is this a credit application for a property that has completed its HTC compliance period?

If yes, list name of project and WHEDA application number: _____

Will this project be utilizing federal assistance?

Will the project be receiving project based federal rental assistance?

If yes, provide the subsidy source:

and number of units:

HUD RAD - number of units:

RD/Rental Assistance - number of units:

Section 221(d)(3) BMIR - number of units:

Section 236 - number of units:

Section 8 Rent Supplemental or Rental Assistance Payment - number of units:

Section 8 Housing Assistance Payment Contract - number of units:

Other - number of units:

Is HUD approval for transfer of physical asset required?

Is RD approval for transfer of physical asset required?

Is WHEDA approval for transfer of physical asset required?

Targeting of units

Family - number of units: RCAC - number of units:

Elderly - number of units: Supportive Housing - number of units:

Homeless - number of units: Single Room Occupancy - number of units:

Credit Request

Guidance on Set-Aside Selection

Nonprofit Set-Aside: Please see requirements in Appendix B. See description in the QAP.

Rural Set-Aside: See description in the QAP.

Supportive Housing Set-Aside: See description in the QAP.

Preservation Set-Aside: Limited to preservation of existing housing developments subsidized with federal assistance as defined in the QAP.

Set Aside:

Credit percentage applied for: 4% 9% _____

Federal financing? Type of federal financing _____

Disaster Credits:

Minimum Set-Aside Requirements (Select only one): *

At least **20%** of the rental residential units in this project will be rent-restricted and occupied by individuals whose income is **50%** or less of area median income as adjusted by family size and published annually by HUD.

At least **40%** of the rental residential units in this project will be rent-restricted and occupied by individuals whose income is **60%** or less of area median income as adjusted by family size and published annually by HUD.

Project Description

Apartment Type: *

Elevator Building - number of stories: Non-elevator Building - number of stories:

Row house/town house Detached two-family (duplex)

Detached single-family Other: _____

Construction Type: *

Slab on grade Partial Basement
 Crawl space Full Basement

Ownership Type: *

Rental
 Rental Targeted For Eventual Resident Ownership

A plan must be submitted incorporating 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.

Applicant Information

Note: Both the Developer and Co-Developer must sign the application. Both the Developer and Co-Developer are expected to own an interest in the controlling entity (managing member or general partner) for the project, materially participate in the development of the project, and make financial guarantees to the investor. If these tests are not met, the entity should be listed as "consultant" under Project Team.

Primary Applicant/Developer

Name: _____

Address: _____

City: _____ State: Zip: _____

Primary Contact: First: _____ Last: _____ Title: _____

Telephone: _____

Alt Phone: _____

Fax: _____

Email Address: _____

Is there a Co-Applicant?

Co-Applicant/Developer

Name: _____

Address: _____

City: _____ State: Zip: _____

Primary Contact: First: _____ Last: _____ Title: _____

Telephone: _____

Alt Phone: _____

Fax: _____

Email Address: _____

Additional Information

Do any unsatisfied judgements exist against the applicant(s)/developer(s), its principals, or any related party?

Has any party related to this application been party to any litigation, including real estate foreclosure or bankruptcy within the past 7 years?

Do any environmental issues or administrative proceedings exist that would adversely affect the ability to timely proceed?

Explanation (if the answer to any of the three previous questions was yes).
If necessary, attach additional documentation

Site Description

Total Site Acreage: Total Buildable Acreage:

If buildable acreage is less than total acreage, please explain:

Identify utilities and services currently available (and with adequate capacity) for this site:

Storm Sewer Water Sanitary Sewer Electric Gas

Is the demolition of any buildings required or planned?

If yes, please describe:

Are existing buildings on the site currently occupied?

If yes:

(a) Briefly describe the situation:

(b) Will tenant displacement be temporary?

(c) Will tenant displacement be permanent?

Describe relocation plan and assistance:

Legal Description of Property: _____

Site Control

Does an identity of interest (direct or indirect) exist between the owner/principal or ownership entity with the option/contract for purchase of the property and the seller of the property?

If yes, specify the relationship:

Does the owner have fee simple ownership of the property (site/buildings)?

If yes provide:

Purchase Date: _____ Purchase Price:

If no:

(a) Enter the current expiration date of the option/contract to purchase: _____

(b) Enter Purchase Price:

Development Estimated Schedule

Date first building is to be placed in service: _____

Date last building is to be placed in service: _____

Adaptive Re-use or Rehabilitation Projects Only

Rehabilitation expenditures allocable to low-income units:

Adjusted building basis:

Acquisition of Existing Buildings (Adaptive Re-use or Rehabilitation Projects Only)

How many buildings will be acquired for the development?

Are all of the buildings currently under site control for the development?

Buildings

Address	Type of Control	Expiration Date of Control Document	Number of Units	Acquisition Cost of Building
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Zoning

Present zoning classification of the site: _____

Is multifamily use permitted?

Are variances, special or conditional use permits or any other item requiring a public hearing needed to develop this proposal?

If yes, have the hearings been completed and permits been obtained?

If yes, specify permit or variance required and date obtained.

If no, describe permits/variances required and schedule for obtaining them:

Are there any existing conditions of historical significance located on the project site that will require Wisconsin State Historical Society office review?

If yes, describe below:

Are there any existing conditions of environmental significance located on the project site?

If yes, describe below:

Ownership Entity

Owner Name: _____

C/O: _____

Address: _____

City: _____ State: Zip: _____

Federal Tax ID Number of Ownership Entity: _____

Entity Type:

Entity Status:

Ownership Contact Person: First Name: _____ Last Name: _____

List all general partners, members, and principals. Specify nonprofit, corporate, general partners, or members. Click [Add] to add additional partners, members, and principals.

WHEDA will require a detailed listing and/or organizational chart of all individuals or corporate entities that will maintain 20% or greater ownership in the managing member or general partner.

Entity/Principal Name: _____

First Name: _____ Last Name: _____ Entity/Principal Function: *

Address: _____

City: _____ State: Zip: _____

Phone: _____ Fax: _____

E-Mail: _____ Nonprofit: TaxID _____

Ownership Percentage:

Project Team

Provide contact information for development team members below:

Management Agent Identity of Interest?

Company: _____
 Address: _____
 City: _____ State: Zip: _____
 Phone _____ Email: _____
 Contact Name: First: _____ Last: _____

Is there a Consultant/Application Preparer?

Consultant/Application Preparer (if different from developer) Identity of Interest?

Company: _____
 Address: _____
 City: _____ State: Zip: _____
 Phone _____ Email: _____
 Contact Name: First: _____ Last: _____

General Contractor Identity of Interest?

Company: _____
 Address: _____
 City: _____ State: Zip: _____
 Phone _____ Email: _____
 Contact Name: First: _____ Last: _____

Equity Investor/Syndicator Identity of Interest

Percentage of Interest:
 Company: _____
 Address: _____
 City: _____ State: Zip: _____
 Phone _____ Email: _____
 Contact Name: First: _____ Last: _____

Is there a Design Architect?

Design Architect Identity of Interest?

Company: _____
 Address: _____
 City: _____ State: Zip: _____
 Phone _____ Email: _____
 Contact Name: First: _____ Last: _____

Is there a Supervisory Architect?

Supervisory Architect Identity of Interest

Company: _____
 Address: _____
 City: _____ State: Zip: _____
 Phone _____ Email: _____
 Contact Name: First: _____ Last: _____

Attorney Identity of Interest

Company: _____
 Address: _____
 City: _____ State: Zip: _____
 Phone _____ Email: _____
 Contact Name: First: _____ Last: _____

Project and Unit Amenities

Please provide a detailed description of the proposed project:

Site Amenities (check all that apply):

- | | | | | |
|--|---|---|--|---|
| <input type="checkbox"/> Community Bldg - Sq Ft:[] | <input type="checkbox"/> Community Room - Sq Ft:[] | | | |
| <input type="checkbox"/> Garages | Number:[] Rent:[] | | | |
| <input type="checkbox"/> Surface Parking | Number:[] Rent:[] | | | |
| <input type="checkbox"/> Underground Parking | Number:[] Rent:[] | | | |
| <input type="checkbox"/> Laundry Rm | <input type="checkbox"/> Screened Porch | <input type="checkbox"/> Resident Computer Center | <input type="checkbox"/> Exam Rm | <input type="checkbox"/> Reading Rm/Library |
| <input type="checkbox"/> Game/Craft Rm | <input type="checkbox"/> Exercise Rm | <input type="checkbox"/> Media Center Rm | <input type="checkbox"/> Beauty Salon/Barber | <input type="checkbox"/> Guest Lodging |
| <input type="checkbox"/> Chapel | <input type="checkbox"/> Picnic Area | <input type="checkbox"/> Garden Plots | <input type="checkbox"/> Covered Drive Thru | <input type="checkbox"/> Pool |
| <input type="checkbox"/> Car Care Area | <input type="checkbox"/> Playground | <input type="checkbox"/> Onsite Leasing Office | <input type="checkbox"/> Storage Units | <input type="checkbox"/> Gazebos |
| <input type="checkbox"/> Walking Trails | <input type="checkbox"/> Security Locked Bldg | <input type="checkbox"/> Community Dining Rm | <input type="checkbox"/> Therapeutic Whirlpool Tub | <input type="checkbox"/> Community Patio |
| <input type="checkbox"/> Trash Disposal Chutes | <input type="checkbox"/> 24 Hour On-site Resident Manager | | | |

Description of On-site Services and Activities:

Describe Differences in Low-income & Market-rate Unit Amenities:

Interior Apartment Amenities (check all that apply):

- | | | | | | |
|---------------------------------------|--|-------------------------------------|---------------------------------------|--|---|
| <input type="checkbox"/> Range/Oven | <input type="checkbox"/> Range Hood | <input type="checkbox"/> Dishwasher | <input type="checkbox"/> Disposal | <input type="checkbox"/> Refrigerator | <input type="checkbox"/> Exterior Storage |
| <input type="checkbox"/> Washer/Dryer | <input type="checkbox"/> W/D Hookups | <input type="checkbox"/> Pantry | <input type="checkbox"/> Ceiling fans | <input type="checkbox"/> Walk-in closets | <input type="checkbox"/> Drapes |
| <input type="checkbox"/> Mini-blinds | <input type="checkbox"/> Patio/Balcony | <input type="checkbox"/> Microwave | <input type="checkbox"/> Sunrooms | <input type="checkbox"/> Front Porches | |

Flooring: Carpet Vinyl Wood Ceramic Tile Other _____

Heating/Cooling: Gas Heat Heat Pump Electric Pump Electric Heat Central Air Window A/C A/C Sleeve

Unit Mix

Low Income Units

Low income rents shall be the lower of market rents as determined by the market study, proposed HTC set-aside rents, or the current HAP/RAP or other subsidy program rents applicable to the project

Type	# BRs	Net Sq.Ft.	Total # Units	CMI%	Voucher Units	Home Units	Emp Units	Monthly Rent	Utility Allowance	**Total Housing Exp.	Rent Limit
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Project will use National Non-Metropolitan Rent Limits

Extend Rent Limit

Utilities included in rents: Water/Sewer Electric Gas Other

Contract Number _____

Employee Units

Type	# BRs	Net Sq.Ft.	Total # Units	Monthly Rent
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Utilities included in rents: Water/Sewer Electric Gas Other _____

Market Rate Units

Type	# BRs	Net Sq.Ft.	Total # Units	Monthly Rent
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Utilities included in rents: Water/Sewer Electric Gas Other _____

Statistics

	All Units	Voucher Units	Home Units	Employee Units	Gross Monthly Rental Income
Low Income					
30% CMI	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
40% CMI	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
50% CMI	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
60% CMI	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Low Income Totals.....					
Common Space					
Employee Units	<input type="text"/>			<input type="text"/>	<input type="text"/>
Market Rate	<input type="text"/>				<input type="text"/>
Totals.....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Proposed number of residential buildings: Maximum number of stories in building(s):

Project Includes:

- Elevators - Number of Elevators:
- Accessory Building(s)
- Commercial Facilities
- Other Facilities

Square Footage Information

Gross Floor Square Footage:

Residential Sq.Ft. (All Heated Areas):

Commercial/Retail Square Footage:

Remarks concerning Unit Mix:

Funding Sources

Note on Permanent Rate: WHEDA requires applicants use the following permanent loan interest rate methodology for all LOLA Initial Applications:

- A. Competitive Applications:** Use WHEDA's Tax Credit Financing rate published on WHEDA.com on the day prior to application submittal.
- B. Noncompetitive Applications:** Use WHEDA's Tax-Exempt Financing rate published on WHEDA.com the week prior to application submission, with a 35-year amortization.
- C.** Applicant may use other terms if a term-specific, executed financing commitment accompanies the Application.

Source	Amount	Non-Amortizing*	Rate (%)	Term (Years)	Amort. Period (Years)	Annual Debt Service
Permanent Loan - Lender Name:	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Subordinate Loan - Lender Name:	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Subordinate Loan - Lender Name:	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tax Exempt Loan - Bond Issuer	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tax Exempt Loan - Bond Issuer	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
AHP Loan	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Loan	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Grant	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
CDBG Grant	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
WHEDA Foundation Grant	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other - Specify Grantor:	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other - Specify Grantor:	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other - Specify Grantor:	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Housing Tax Credit Equity	<input type="text" value="0"/>					
Historic Tax Credit Equity	<input type="text"/>					
Deferred Developer Fees	<input type="text"/>					
Owner Investment	<input type="text"/>					
Other - Specify:	<input type="text"/>					
Total Sources	<input type="text"/>					

Construction Financing			
Source of Funds	Amount	Rate	Term (monthly)
Construction Loan - Lender name	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bridge Loan - Lender name	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tax Credit Equity	<input type="text"/>		
Total:	<input type="text"/>		

* "Non-amortizing" indicates that the loan does not have a fixed annual debt service (i.e., the loan is subject to available cash flow). Do not check the Non-Amortizing box if this is "must pay" debt service.

Estimated pricing on sale of Federal Tax Credits:

Estimated pricing on sale of Historic Tax Credits:

Remarks concerning Project Funding Sources:
(Please be sure to include the name of the funding source(s))

Project Costs and Credit Calculation

Cost Element	ESTIMATED TOTAL COST	Eligible Basis	
		30% PV	70% PV
A. Purchase Buildings and Land			
Land			
Purchase of Buildings			
Demolition			
Other Buildings and Land			
SUBTOTAL: Purchase Buildings and Land	0	0	0
B. Site Work			
Site Work			
Off Site Work			
Landscaping			
Other Site Work			
SUBTOTAL: Site Work	0	0	0
C. New Construction/Rehabilitation			
Construction of New Buildings			
Rehabilitation			
Accessory Buildings (Garage, storage, etc)			
Personal Property			
General Requirements			
Contractor Overhead			
Contractor Profit			
Construction Supervision			
Other New Construction/Rehabilitation			
SUBTOTAL: New Construction/Rehabilitation	0	0	0
D. Contingency			
Construction Contingency			
Other Contingency			
SUBTOTAL: Contingency	0	0	0
Construction Cost Subtotal	0	0	0
E. Architectural and Engineering			
Architect's Fee - Design			
Architect's Fee - Inspection/Supervision			
Engineering Costs			
Other Achitectural and Engineering			
SUBTOTAL: Architectural and Engineering	0	0	0
F. Interim/Construction Costs			
Construction Insurance			
Construction Loan Interest			
Construction Loan Origination Fee - Non WHEDA			
Construction Loan Origination Fee - WHEDA			
Construction Loan Credit Enhancement/LOC			
Construction Period Real Estate Taxes			
Water, Sewer and Impact Fees			
Other Interim/Construction Costs			
SUBTOTAL: Interim/Construction Costs	0	0	0
G. Financing Fees and Expenses			
Cost of Bond Issuance			
Permanent Loan Origination Fee - Non WHEDA			
Permanent Loan Origination Fee - WHEDA			
Permanent Loan Credit Enhancement			
Other Financing Fees and Expenses			
SUBTOTAL: Financing Fees and Expenses	0	0	0
H. Miscellaneous Costs			
Property Appraisal			
Market Study			
Environmental Report			
Survey			
Rent-Up Marketing			
Tax Credit Application Fees			
Tax Credit Compliance Fee			
Tax Credit Allocation Fee			
Cost Certification/Accounting Fees			
Title and Recording			
Permanent Relocation Expenses			
Temporary Relocation Expenses			
Furnishings and Equipment			
Capital Needs Assessment Report			

Legal Fees - Miscellaneous			
Legal Fees - Real Estate			
Other Miscellaneous Costs			
SUBTOTAL: Soft Costs	0	0	0
I. Syndication Costs			
Bridge Loan Fees and Expenses			
Organizational (Partnership)			
Tax Opinion			
Other Syndication Costs			
SUBTOTAL: Syndication Costs	0		
J. Developer's Fees			
Developer's Fee - Received			
Developer's Fee - Deferred			
Developer Overhead			
Consultants			
Other Developer's Fees			
SUBTOTAL: Developer's Fees	0	0	0
K. Reserves			
Rent-Up Reserve			
Operating Reserve			
Replacement Reserve			
Capital Needs Reserve			
Debt Service Reserve			
Escrows			
Other Reserves			
SUBTOTAL: Reserves	0		
Intermediate Costs	0	0	0
Total Development Costs	0	0	0
Less Federal Financing			
Less Nonqualified Nonrecourse Financing			
Less Historic Tax Credit Residential			
Less			
Other			
Total Eligible Basis		0	0
Adjustment for QCT/DDA			
Deduction from QCT/DDA Adjustment			
HFA Boost			
Deduction from HFA Boost			
Applicable Fraction		0%	0%
Total Qualified Basis		0	0
Tax Credit Percentage Rate		0%	0%
Federal Tax Credits at Estimated Rate		0	0
Total Federal Tax Credits at Estimated Rate	0		
Previous Year's Allocation			
Federal Tax Credits Requested	0		
Credit Calculation Using Equity Gap			
Total Project Costs	0		
Less:			
Loans			
Grants			
Historic Rehab Credits			
Other			
Total Sources of Funds	0		
Total Equity Gap	0		
Minimum Credit Value			
Investor Ownership %	0%		
Tax Credit Allowed by Equity Gap Calculation			
Credit Calculated by:			
Eligible Basis Calculation	0		
Equity Gap Calculation	0		
Other Adjustment*			
Credit Amount	0		
Disaster Credit Amount			
Per-Capita Credit Amount			

Remarks concerning Project Costs and Credit Calculation:

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* Other Adjustment - Developments may be subject to a reduction in credit by the equity gap calculation.

1. Architectural fees in eligible basis (including both design and supervision) are limited to no more than 3% of the total of the New Construction/Rehabilitation and Site Work categories from Project Costs and Credit Calculation page.
 2. Budgeted construction contingency, based on the subtotal of new construction/ rehabilitation, and should be at a minimum 5% for new construction and 10% for adaptive reuse or acquisition rehab type projects. A weighted average should be used for projects with both new construction and adaptive reuse or acquisition rehab units.
 3. Construction supervision, consultant fees, developer fees and developer overhead are limited to a combined 15% of total development costs for new developments with 24 units or less and to 12% for those with more than 24 units. Those same fees are subject to greater restrictions for the acquisition portion of acquisition/rehab projects. See Developer Fee Policy.
 4. If the construction lender and permanent lender are same entity, the construction loan origination fee is not allowed in eligible basis.
 5. Applications that contain an identity of interest between the buyer and seller of real estate or between the developer, owner and general contractor should refer to Appendix Q for guidance on allowable fees.
 6. General requirements, contractor overhead and contractor profit are limited to 12% in aggregate.
 7. An amenity for which there will be an additional fee for the resident (parking, for example) must have its corresponding capital cost excluded from Eligible Basis on the Credit Calculation page, and on the project's Cost Certification. For those applications in which the costs of underground parking are removed from eligible basis, a minimum of \$7,500 per underground space should be removed from eligible basis. Use minimum \$2,000 per space for above ground covered parking.
- See Instructions for calculation methodology.
-

Projected Operating Costs

Project Operations (Year One)	
I. Rent Expense	
Conventions and Meetings	
Management Consultants	
Advertising/Marketing Expense	
Subtotal: Rent Expense	0
II. Administrative Expenses	
Office Salaries	
Office Expenses	
Office or Model Apartment Rent	
Management Fee - Residential Rents	
Management Fee - Commercial Rents	
Management Fee - Misc Income	
Manager/Superintendent Salaries	
Administrative Rent-free Unit	
Legal Expenses - Project Only	
Auditing Expenses - Project Only	
Bookkeeping Fees/Accounting Services	
Bad Debt Expense	
Misc Administrative Expenses	
Subtotal: Administrative Expenses	0
III. Utilities Expenses	
Fuel Oil	
Electricity (Light & Misc. Power)	
Water	
Gas	
Sewer	
Owner-paid unit amenities	
Subtotal: Utilities Expenses	0
IV. Operating & Maintenance Expenses	
Payroll	
Supplies	
Contracts	
Operating and Maintenance Rent Free Unit	
Garbage and Trash Removal	
Security Payroll/Contract (incl taxes and benefits)	
Security Rent Free Unit	
Heating/Cooling Repairs & Maintenance	
Snow Removal	
Vehicle/Maintenance Equipment Operation & Repairs	
Miscellaneous Operating & Maintenance Expense	
Subtotal: Operating	0
V. Taxes and Insurance	
Real Estate & Personal Property Taxes	
Payroll Taxes - Project Share	
Property and Liability Insurance (Hazard)	
Fidelity Bond Insurance	
Workmen's Compensation	
Health Insurance and Other Employee Benefits	
Misc Taxes, Licenses, Permits, and Insurance	
Subtotal: Taxes and Insurance	0
VI. Total Service Expense	
Dietary Salaries	
Dietary Purchased Serv	
Food	
Registered Nurse Salary	
Housekeeping Salary	
Housekeeping Supply	
Other Housekeeping	
Housekeeping Purchased Serv	
Medical Supplies	
Medical Purchased Serv	
Laundry/Linen	
Laundry Salaries	
Laundry Purchased Serv	
Laundry Supplies	
Medical Records Salary	
Medical Records Supply	
Med Records Purchased Srv	

Recreation/Rehab	
Activities Supplies	
Activities Purchased Serv	
Rehab Salaries	
Rehab Supplies	
Rehab Purchased Serv	
Other Support Serv	
Subtotal: Service Expense	0
Tax Credit Monitoring Fees	
Annual Replacement Reserves	
Total Operating Expenses	0
Total Units	
Per Unit Per Month	

Remarks concerning Projected Operating Costs:

Projected Cash Flow

Year One

Inflation Rate	
Income Inflation Rate	0%
Expense Inflation Rate	0%
Operating Income	
Gross rental income (from Unit Mix - Total Monthly Rent)	
Parking	
Stores and Commercial	
Laundry and Vending	
Other (specify):	
Other	
Total Gross Income Potential at 100% Occupancy	0
7% Vacancy Allowance	0
NET RENTAL/OTHER INCOME	0
TOTAL OPERATING EXPENSES (from Projected Operating Costs)	
NET OPERATING INCOME	0
DEBT SERVICE (from Funding Sources Loans)	
NET CASH FLOW	0
DEBT COVERAGE RATIO (Minimum of 1.175)	

Include and calculate other estimated non-rental income sources below:

20-Year Cash Flow

Year	1	2	3	4	5	6	7	8	9	10
Net Rental/Other Income										
Total Operating Expenses										
Debt Service										
Net Cash Flow										
Debt Coverage Ratio										
Year	11	12	13	14	15	16	17	18	19	20
Net Rental/Other Income										
Total Operating Expenses										
Debt Service										
Net Cash Flow										
Debt Coverage Ratio										

Developments should maintain Debt Coverage Ratio of minimum 1.15 through year 15.

Calculations:

- "Debt Service" is the sum of "regular/amortized loan debt service + non-amortizing annual service" as entered by user from Funding Sources section.
- "Net Cash Flow" is "Net Rental/Other Income" minus "Total Operating Expenses" minus "Debt Service".
- "Debt Coverage Ratio" is ("Net Rental/Other Income" minus "Total Operating Expenses") divided by "Debt Service".

Financial Feasibility Threshold Test

WHEDA will evaluate the financial feasibility of all HTC Applications. Feasibility is determined by taking into account a variety of factors including: projected operating expenses, replacement reserves, rents and other income, vacancy assumptions, debt service and expected equity proceeds.

Developments submitted with operating expenses, operating reserves, replacement reserves and/or a debt coverage ratio outside the prescribed ranges, without documentation, will be considered infeasible. At WHEDA's discretion, only acquisition/rehabilitation projects will be permitted to request a variance on the posted operating expense range(s). Provide a copy of last three (3) years P&L (revenue & expenses) statements for currently operating developments. Submit operating expense documentation to support the proposed operating expense assumption for the proposed project.

	Value outside of expected range please enter explanation.	
PUPM Operating Expenses & Replacement Reserves	<input type="text" value="\$0.00"/>	Per Unit Per Month Note _____
<p>Expected Range: Single Family Homes/Duplex - \$490 to \$565 Expected Range: Elderly - \$375 to \$465 Expected Range: Family/Other - \$455 to \$555</p> <p>*Submit operating expense documentation to support the proposed operating expense assumption for the proposed project.</p>		
	Value outside of expected range please enter explanation.	
Debt Coverage Ratio: Primary "Must Pay" Debt	<input type="text" value="0.000"/>	Debt Ratio Note _____
<p>Expected Range for Tax-Exempt Applications: 1.10 to 1.40 Expected Range for Supportive Housing and/or Elderly Assisted Living if any Service Income helps support Net Cash Flow: 1.20 to 1.40 Expected Range for All Other: 1.175 to 1.40</p>		
	Value outside of expected range please enter explanation.	
Operating Reserve	<input type="text" value="0.00"/>	Operating Reserve Note _____
<p>Expected Value: 6.0 months or more</p>		
	Value outside of expected range please enter explanation.	
Annual Per-Unit Replacement Reserves	<input type="text" value="\$0.00"/>	Annual Reserves Note _____
<p>Expected Value: New Construction, Elderly - \$250 or more Expected Value: New Construction, Family - \$300 or more Expected Value: Acquisition/Rehab - \$300 or more Expected Value: Single Family Homes/Duplex - \$400 or more</p>		
	Value outside of expected range please enter explanation.	
General Requirements	<input type="text" value="0.0000"/>	General Requirements Note _____
<p>Expected Value: 5% or less</p>		
	Value outside of expected range please enter explanation.	
Contractor Overhead	<input type="text" value="0.0000"/>	Contractor Overhead Note _____
<p>Expected Value: 2% or less</p>		
	Value outside of expected range please enter explanation.	
Contractor Profit	<input type="text" value="0.0000"/>	Contractor Profit Note _____
<p>Expected Value: 5% or less</p>		

WHEDA reserves the right to reject competitive applications not maintaining a minimum 1.15 debt service coverage ratio through year 15 (1.10 for noncompetitive applications) OR reduce Credit requests/allocations at Review One, Two or Three based on either an "equity gap" model or an initial debt service coverage exceeding 1.40.

WHEDA reserves the right to reduce Credit requests or allocations at any stage of the application process per Section 42 of the Code. Any reduction of Credit will be based on WHEDA's evaluation of debt and equity available and necessary for development feasibility.

WHEDA reserves the right to reject competitive applications for the inability to repay deferred developer fees in the 15 year tax credit period.

Special Instructions on all Supportive Housing or Elderly Assisted Living Developments:

Applicant MUST provide along with the application:

1. separate proforma detailing the service expenses and income of the project, and
2. supporting documentation describing the assumptions used for service pricing, service expenses and service demand by the residents.

Remarks concerning Financial Feasibility Test:

Instructions/Scoring Summary

2020 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 most points scored in the category "Areas of Economic Opportunity" will be ranked the highest. A secondary tiebreaker, if needed, will rank applications by lowest amount of Housing Tax Credits (HTCs) per low income 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 Categories	2020 Points	Applicant Score
1. Lower-Income Areas	5	0
2. Energy Efficiency and Sustainability	32	0
3. Mixed-Income Incentive	12	0
4. Serves Large Families	5	0
5. Serves Lowest-Income Residents	60	0
6. Supportive Housing	20	0
7. Rehab/Neighborhood Stabilization	25	0
8. Universal Design	18	0
9. Financial Leverage	36	0
10. Eventual Tenant Ownership	3	0
11. Development Team	12	0
12. Readiness to Proceed	12	0
13. Areas of Economic Opportunity	28	0
14. Rural Areas without Recent Housing Tax Credit Awards	5	0
Scoring Total	273	0

All Appendices and WHEDA forms referenced in scoring categories can be located on WHEDA's website (www.wheda.com)

Reminder: In the General, Preservation and Supportive Housing set-asides, the credit limit will be \$1,550,000 per application. In the Non-Profit and Rural set-asides, the credit will be limited to \$800,000 per application.

1. Lower-Income Areas

Do you wish to claim points for this scoring category?

Eligible Locations:

Check one box, if both are selected then 3 points will be unselected.

Check Box	Points	Feature
<input type="checkbox"/>	5	<p>Five Points will be awarded for:</p> <ol style="list-style-type: none"> 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 <ul style="list-style-type: none"> Attach a print-out of census tract from American Fact Finder or similar program Provide the website location for the community revitalization/redevelopment plan or provide a hard copy of the plan Properties located on federally designated Tribal lands
<input type="checkbox"/>	3	<p>Three Points will be awarded for:</p> <ol style="list-style-type: none"> Properties in a QCT that have a Concerted Community Revitalization Plan (CCRP) <ul style="list-style-type: none"> Attach a print-out of census tract from American Fact Finder or similar program Provide the website location for the community revitalization/redevelopment plan or provide a hard copy of the plan

Concerted Community Revitalization Plans (CCRPs) must:

- be geographically specific (the proposed HTC development must be within the identified planning area)
- include a strategy for obtaining commitments of public and private investment for infrastructure, amenities, or services beyond the proposed HTC development
- clearly demonstrate the need for revitalization in the planning area
- include elements such as outcome goals, timelines and benchmarks, and identification of community partners
- have been approved within the past 10 years

CCRPs do not necessarily need to be approved by the local municipality. CCRPs completed by neighborhood groups (which meet the criteria noted above) will be acceptable.

Maximum 5 Points	Total Points: <input type="text" value="0"/>
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2. Energy Efficiency and Sustainability

Do you wish to claim points for this scoring category?

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

Check Box	Max Points	Description																		
<input type="checkbox"/>	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>WHEDA will require program certification from Wisconsin Green Built Homes or Enterprise Green Communities prior to release of the 8609.</p>																		
<input type="checkbox"/>	4	<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>Please select one of the following:</p> <table border="1"> <thead> <tr> <th>Check Box</th> <th>Meets Rural Set-Aside</th> <th>Points</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Walk Score 60 and above</td> <td>4</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Walk Score between 40-59 or site on Tribal Lands</td> <td>2</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Check Box</th> <th>All Other Sites</th> <th>Points</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Walk Score 70 and above</td> <td>4</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Walk Score between 50-69</td> <td>2</td> </tr> </tbody> </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>	Check Box	Meets Rural Set-Aside	Points	<input type="checkbox"/>	Walk Score 60 and above	4	<input type="checkbox"/>	Walk Score between 40-59 or site on Tribal Lands	2	Check Box	All Other Sites	Points	<input type="checkbox"/>	Walk Score 70 and above	4	<input type="checkbox"/>	Walk Score between 50-69	2
Check Box	Meets Rural Set-Aside	Points																		
<input type="checkbox"/>	Walk Score 60 and above	4																		
<input type="checkbox"/>	Walk Score between 40-59 or site on Tribal Lands	2																		
Check Box	All Other Sites	Points																		
<input type="checkbox"/>	Walk Score 70 and above	4																		
<input type="checkbox"/>	Walk Score between 50-69	2																		
<input type="checkbox"/>	4	<p>Public Transportation</p> <p>Points will be awarded to developments in which any portion of the site is located 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.</p> <p>Provide a map or schedule showing that the site is no more than one-half mile from a regularly scheduled bus stop. For properties on tribal land, provide evidence of "on call" transportation programs that provide the users a choice of local destinations.</p>																		
<input type="checkbox"/>	4	<p>Non-Smoking</p> <p>Properties designated as non-smoking and evidenced in "house rule" or lease would be eligible to receive up to 4 points in this category.</p>																		

Maximum Points: 32	Total Points: <input type="text" value="0"/>
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3. Mixed-Income Incentive

Do you wish to claim points for this scoring category?

NOTE:

- To qualify for points in this category, market rate rents must be at least 5% greater than the 60% CMI rents of the comparable unit sizes. Market rate rents must be supported by the market study.
- 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.
- Applicants applying in the Rural 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	<input type="text"/>		
Total Units	<input type="text"/>	/ <input type="text"/>	= <input type="text"/> %
Multiplied by 0.80		X 0.80	= <input type="text"/> Points

Example – Eight (8) market rate units divided by 60 total units = 13.33%. 13.33 x 0.80 = 10.67 rounded down to 10 points.

Maximum 12 Points	Total Points: <input type="text"/>
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4. Serves Large Families

Do you wish to claim points for this scoring category?

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.**
 - **Units with project based vouchers or other rental subsidies must be reflected as 60% CMI units on the Unit Mix page.**
1. New construction/adaptive reuse units must
 - be 50% CMI or below or have committed project based vouchers or other rental subsidies 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

	0		/	0	=	0		%
--	---	--	---	---	---	---	--	---

Percentage	Points
5-10%	1
11-15%	3
16-100%	5

Maximum 5 Points	Total Points: <input style="width: 40px;" type="text" value="0"/>
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5. Serves Lowest-Income Residents

Do you wish to claim points for this scoring category?

NOTE:

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.

A. 60 Point Calculation

Total Units for Development	<input type="text"/>			
CMI Set-Aside Percentage	Number of Units @ CMI	Percentage of Total, (Must equal or exceed 5%)	Multiply Percent by Factor	Total Points
50%	<input type="text"/>	<input type="text"/> %	X <input type="text"/> .86=	<input type="text"/>
40%	<input type="text"/>	<input type="text"/> %	X <input type="text"/> 1.07=	<input type="text"/>
30% or Lower	<input type="text"/>	<input type="text"/> %	X <input type="text"/> 1.29=	<input type="text"/>

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.

Maximum 60 Points	Total Points: <input type="text" value="0"/>
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6. Supportive Housing

Do you wish to claim points for this scoring category?

NOTE:

- **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 .75 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 Supportive Units	Total Units	Percentage of Supportive Housing	Points
<input type="text"/>	<input type="text"/>	<input type="text"/> %	<input type="text"/>
Check Box	Points	Description	
<input type="checkbox"/>	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. ($4/24 = 16.67\% \times 0.75 = 12.5$).

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.

Maximum Points: 20	Total Points: <input type="text" value="0"/>
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7. Rehab/Neighborhood Stabilization

Do you wish to claim points for this scoring category?

NOTE:

- **Projects scoring points in this category cannot score points in Category 13.**
- **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.

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.

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 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 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.

Maximum 25 Points	Total Points: <input type="text" value="0"/>
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8. Universal Design

Do you wish to claim points for this scoring category?

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 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 ICC (International Code Council) Code 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 or may be viewed online at no cost at <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
<input type="checkbox"/>	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>
<input type="checkbox"/>	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>
<input type="checkbox"/>	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>
<input type="checkbox"/>	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
<input type="checkbox"/>	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>
<input type="checkbox"/>	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"> a sample floor plan is submitted to show this feature is located on an accessible floor level, AND at least one bedroom is located on this accessible level floor 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>
<input type="checkbox"/>	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>
<input type="checkbox"/>	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>
<input type="checkbox"/>	3	

		All interior doors intended for user passage shall comply with Section 1003.5, which includes maneuvering clearances, thresholds, clear width, level hardware, etc. <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 404.2.3.2.</i>
<input type="checkbox"/>	3	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. <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>
<input type="checkbox"/>	3	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. <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>
<input type="checkbox"/>	3	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. <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>
<input type="checkbox"/>	2	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. Minimum 10% of total development units. <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>
<input type="checkbox"/>	2	Carpet shall have 1/2" maximum pile and meet all requirements of Section 302.2 <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>
<input type="checkbox"/>	1	All unit light switches shall be Rocker type light switches.

Items Below only available for Acquisition/Rehab and Preservation project - 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
<input type="checkbox"/>	2	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.
<input type="checkbox"/>	3	Electrical outlets and cable/data outputs set to a minimum height 18" above the floor.
<input type="checkbox"/>	3	Thermostats, primary electrical box and light switches set to a maximum height of 48" above the floor.
<input type="checkbox"/>	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>ANSI Intent Statement: 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>
<input type="checkbox"/>	1	Toilets in units shall have clearances that meet requirements of Section 1004.11.3.1.2. <i>ANSI Intent Statement: All sections referenced are describing the various clearance options at the toilet and are diagrammed 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. Sections 1004.11.3.1.2.2.1 and 1004.11.3.1.2.2.4 describe widths and vanity overlap.</i>
<input type="checkbox"/>	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>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	

<input type="checkbox"/>	<p>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.</p> <p><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></p>
<input type="checkbox"/>	2 Bathroom/shower compartment permanently lined with non-skid surface or pattern covering 75% of floor.

Sum of Items Checked:

Sum of checked items	Maximum total points
34 and Over	18
27-33	14
21-26	10
14-20	6
6-13	3

Maximum Points: 18 **Total Points:**

9. Financial Leverage

Do you wish to claim points for this scoring category?

Is this project financed with Historic Tax Credits?

If this is an additional credit application, please enter the original Credit Award Equity (from prior years) into the Prior Housing Tax Credit Equity field.

Housing Tax Credit Equity Subtotal	<input type="text" value="0"/>
Prior Housing Tax Credit Equity	<input type="text" value="0"/>
Housing Tax Credit Equity Total	<input type="text" value="0"/>
Total Development Costs	/ <input type="text" value="0"/> = <input type="text" value="0.0"/> %

Percentage	Points
0-53.0%	36
53.1-56.0%	32
56.1-59.0%	28
59.1-62.0%	24
62.1-65.0%	20
65.1-68.0%	16
68.1-75.0%	12
75.1-100%	0

Maximum 36 Points	Total Points: <input type="text" value="0"/>
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10. Eventual Tenant Ownership

Do you wish to claim points for this scoring category?

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.

Maximum Points: 3	Total Points: <input type="text" value="0"/>
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11. Development Team

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:

- Total points for the primary developer individually
- The average of the total points of the primary developer and co-developer

Developer Quality Scoring	Available Points
Development Team	
A. Successful completion of HTC properties (as lead developer) that received 8609s	
Four or more properties in Wisconsin or more than 10 HTC properties in all states	2
Two or more properties in Wisconsin or more than five HTC properties in all states	1
B. Years of HTC and multifamily experience	
Six years of development experience and four years of HTC experience	2
Four years of development experience and three years of HTC experience	1
C. Performance of HTC properties (minimum of three properties of 100 units as lead developer). Application materials must include all HTC projects in portfolio. WHEDA reserves the right to verify.	
Average physical occupancy above 96% during the past three years	3
Average physical occupancy above 94% during the past three years	2
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
	2
	1
Development team members (maximum of 2 points)	
Two points will be awarded for applications that include a Nonprofit organization, acting as Developer and an Owner, that meets the requirements for applicants in the Nonprofit Set-Aside. Nonprofit points will only be applied to the Nonprofit entity.	2
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	1
Developers and 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 6 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.	
Total Developer Quality Points: 12 Points	
Total Possible Points: 12 Points	

12. Readiness to Proceed

Do you wish to claim points for this scoring category?

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

- 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.

Maximum Points: 12	Total Points: <input type="text" value="0"/>
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13. Areas of Economic Opportunity

Do you wish to claim points for this scoring category?

Up to five points will be awarded for each of the items below (limited to a maximum of 18 points). A list of census tracts/school districts that qualify for Median Income, Unemployment, DPI Accountability Score, High Needs Area and Rent Burden points can be found in Appendix R.

Points Clear Selection	Description
<input type="radio"/> 5 points <input type="radio"/> 3 points	Median Income in the Census Tract. Points will be awarded to properties in census tracts at/or above 120% of County Median Income (5 point) and tracts between 100% and 119% of County Median Income (3 points).
<input type="radio"/> 5 points <input type="radio"/> 3 points	Unemployment Rate in the Census Tract. Points will be awarded to properties in census tracts below 70% of the national unemployment rate (5 point) and tracts between 70% and 100% of national unemployment rate (3 points).
<input type="radio"/> 5 points <input type="radio"/> 3 points	School District. Points will be awarded to properties in school districts in the top 25% of the Wisconsin Department of Public Instruction's most recent Overall Accountability Score (5 points) and properties in school districts in the ranking in the second quartile of the Wisconsin Department of Public Instruction's most recent Overall Accountability Score (3 points).
<input type="radio"/> 5 points	Rent Burden. Five points will be awarded to properties located in counties in which 50% or more of renters pay at least 30% of their income toward rent.
<input type="radio"/> 5 points	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. <ul style="list-style-type: none"> • RFP/RFQ Notes: <ul style="list-style-type: none"> ◦ 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. ◦ 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.

Access to services and amenities (maximum of 10 points)

Properties will receive one point for proximity to key services and amenities

- Sites meeting WHEDA's Rural Set-Aside definition: points will be awarded for amenities and services within 2.0 miles
- Sites on Tribal lands: points will be awarded for amenities and services within 4.0 miles
- All other areas of the state: points will be awarded for amenities and services within 1.0 mile

If requesting points for access to services and amenities, include a map with distance measurements, clear color photos, contact person, and contact information. At WHEDA's discretion, absence of these items may result in the project not receiving points claimed.

For the table below, applications containing more than 50% senior units will be allowed to request points in the senior categories – all other applications should use the Family or Supportive categories

Senior Family/Supportive

Item	Check Box
Full Service Grocery Store (2 points)*	<input type="checkbox"/>
Public Elementary, Middle or High School (N/A for Senior)	<input type="checkbox"/>
Senior Center (2 points) (N/A for Family/Supportive)	<input type="checkbox"/>
Full Service Medical Clinic or Hospital**	<input type="checkbox"/>
Library ***	<input type="checkbox"/>
Public park with playground equipment or athletic facilities, or hiking/biking trail	<input type="checkbox"/>
Job-Training Facility, Community College or Continuing Education Programs ****	<input type="checkbox"/>
<i>On-site services and amenities</i>	
In-unit internet at no cost to residents (2 points) *****	<input type="checkbox"/>
On-site community room dedicated for residents	<input type="checkbox"/>

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

**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

***University libraries; public/private school libraries, or mini/mobile libraries are not eligible for points.

****Job-Training Facility, Community College, or Continuing Education Programs - must be available to tenant base to

participate.

*****In-unit Internet will be confirmed at 8609.

Maximum 28 Points	Total Points: <input type="text" value="0"/>
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14. Rural Areas without Recent Housing Tax Credit Awards

Do you wish to claim points for this scoring category?

NOTE:

- **Projects scoring points in this category must be located in a rural county that has not received a 9% Housing Tax Credit Award in the previous three years.**

For 2020, the project must be located in one of the following counties:

- ASHLAND, BARRON, BAYFIELD, BUFFALO, BURNETT, CLARK, COLUMBIA, DUNN, FLORENCE, FOND DU LAC, FOREST, GREEN LAKE, IRON, JACKSON, JUNEAU, KEWAUNEE, LAFAYETTE, LANGLADE, LINCOLN, MANITOWOC, MARQUETTE, MENOMINEE, MONROE, PEPIN, POLK, PRICE, RICHLAND, RUSK, SHAWANO, TAYLOR, TREMPLEAU, VERNON, VILAS, WASHBURN, WAUSHARA

For 2020, projects located in any of the following counties do not qualify:

- ADAMS, BROWN, CALUMET, CHIPPEWA, CRAWFORD, DANE, DODGE, DOOR, DOUGLAS, EAU CLAIRE, GRANT, GREEN, IOWA, JEFFERSON, KENOSHA, LA CROSSE, MARATHON, MARINETTE, MILWAUKEE, OCONTO, ONEIDA, OUTAGAMIE, OZAUKEE, PIERCE, PORTAGE, RACINE, ROCK, SAUK, SAWYER, SHEBOYGAN, ST CROIX, WALWORTH, WASHINGTON, WAUKESHA, WAUPACA, WINNEBAGO, WOOD

Maximum Points: 5	Total Points: <input type="text" value="0"/>
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Application Threshold

2020 Application Submission Checklist - Submit with Initial Application

Competitive credit electronic applications must be submitted NO LATER THAN 5:00 p.m. December 14, 2019. Paper applications (printed by the applicant **after** the electronic submission) must also be submitted. The paper application should be submitted in an organized three-ring binder, indexed, with tab sets clearly marking each exhibit or enclosure. One original of the application is required. Applications will be accepted by hand-delivery or mail. If mailed, applications must be postmarked NO LATER THAN December 14, 2019. If hand-delivered, the submission deadline is December 14, 2019 at 5:00 p.m. Applications must be mailed or hand-delivered to WHEDA's Madison Office. **Non-Competitive Tax-Exempt applications may be submitted anytime between January 2, 2020 and December 21, 2020 and must provide items on the Credit-Award Checklist at the time of initial application.**

Items that MUST be submitted for Initial Application Review. Submit the items in the order below:

N/A	Encl.	APPLICATION FEES - SUBMIT WITH INITIAL APPLICATION			
*	<input type="checkbox"/>	<input type="checkbox"/>	COMPETITIVE Low-Income Housing Tax Credit Application	24 UNITS OR FEWER	\$1,000
*	<input type="checkbox"/>	<input type="checkbox"/>	COMPETITIVE Low-Income Housing Tax Credit Application	OVER 24 UNITS	\$2,000
*	<input type="checkbox"/>	<input type="checkbox"/>	TAX-EXEMPT Low-Income Housing Tax Credit Application	24 UNITS OR FEWER	\$1,000
*	<input type="checkbox"/>	<input type="checkbox"/>	TAX-EXEMPT Low-Income Housing Tax Credit Application	OVER 24 UNITS	\$2,000
*	<input type="checkbox"/>	<input type="checkbox"/>	**WHEDA Multifamily Loan Application Addendum	24 UNITS OR FEWER	\$250
*	<input type="checkbox"/>	<input type="checkbox"/>	**WHEDA Multifamily Loan Application Addendum	OVER 24 UNITS	\$500
			**Competitive Applications: Do not submit this fee until award is made. Non-Competitive Applications: Submit loan fee with Loan Addendum.		
*	<input type="checkbox"/>		See Fee Remittance Form on wheda.com. Credit will not be reserved, allocated, or allowed without payment of these respective fees. Enclose 2 copies of fee form for each type of funding applied for, i.e. HTC, Multifamily App.		
N/A	Encl.	APPLICATION			
*	<input type="checkbox"/>		Application Submission Checklist		
*	<input type="checkbox"/>		Application for Low-Income Housing Tax Credit		
N/A	Encl.	SELF-SCORING -- SUBMIT WITH INITIAL APPLICATION			
*	<input type="checkbox"/>		Self-Scoring Checklist		
*	<input type="checkbox"/>		Self-Scoring Exhibit		
N/A	Encl.	THRESHOLD DOCUMENTATION -- SUBMIT WITH INITIAL APPLICATION			
*	<input type="checkbox"/>	<input type="checkbox"/>	Non-Profit Set-Aside Projects		
			Articles of Incorporation. Copy of IRS tax-exempt status or copy of completed application requesting IRS tax-exempt status.		
			Fully completed Appendix B, including a statement describing the scope of financial guarantees provided by the Nonprofit.		
*	<input type="checkbox"/>	<input type="checkbox"/>	Supportive Housing Set-Aside Projects		
			Firm commitment for rental subsidy for a minimum of 50% of the total development units.		
			Fully completed Appendix T		
*	<input type="checkbox"/>		* Offer to Purchase/Deed		
			A signed & accepted photocopy of an unexpired contract between the current owner and the seller for purchase of the property, or a photocopy of the deed if the title has been transferred. Must identify site location (i.e. legal description, address) of the property, terms of sale - price, seller financing, etc. Options to purchase must extend a minimum of 90 days beyond the application submission date.		
*	<input type="checkbox"/>		Design Threshold Requirement (Refer to Appendix M)		
			Submit copy of Appendix M signed by Applicant/Owner and Architect/Engineer stating all Development Requirements outlined in Appendix M <u>will be incorporated</u> in the completed development.		
*	<input type="checkbox"/>		Market Study - Refer to Appendix A		
*	<input type="checkbox"/>	<input type="checkbox"/>	* Appraisal – establishing "As-is market value" for any project requesting 4% Acquisition Credit (includes both Acquisition/Rehab and Adaptive Re-Use transactions). Must be conducted by third-party appraiser with general certification.		
*	<input type="checkbox"/>	<input type="checkbox"/>	* Completed third-party Capital Needs Assessment for Acquisition/Rehab transactions properties, with the "Scope of Work" attached (Refer to Appendix G & Appendix G1)		
*	<input type="checkbox"/>	<input type="checkbox"/>	Preservation/HUD/RD Developments		
*	<input type="checkbox"/>	<input type="checkbox"/>	Evidence of pre-application structure review with HUD or RD. (Refer to Appendix N and Appendix O)		

*	<input type="checkbox"/>	<input type="checkbox"/>	Provide a photocopy of all Housing Assistance Payment (HAP) contracts, Rental Assistance Payment (RAP) contracts and/or operating assistance contracts. Provide a photocopy of any NAHASDA Assistance. (Refer to Appendix N)
*	<input type="checkbox"/>	<input type="checkbox"/>	Actual or Preliminary approval of all subsidy increases from appropriate authority. (Refer to Appendix N and Appendix O)
*	<input type="checkbox"/>	<input type="checkbox"/>	Actual or Preliminary approval of any special terms or restructuring from appropriate authority. (Refer to Appendix N and Appendix O)
*	<input type="checkbox"/>	<input type="checkbox"/>	Preservation - All Currently Occupied Developments
*	<input type="checkbox"/>	<input type="checkbox"/>	Provide rent roll (dated not more than 60 days prior to application) and identify all residents whose incomes currently exceed tax credit maximums.
*	<input type="checkbox"/>	<input type="checkbox"/>	Provide plan addressing any proposed temporary relocation, or any proposed permanent relocation of over-income residents. The plan should meet the standards established by the federal Uniform Relocation Act (URA). WHEDA <u>prohibits permanent displacement of residents, including those whose incomes are known to, or are estimated to, exceed tax credit maximums.</u> WHEDA may require the reduction of applicable fractions in tax credit awards to avoid displacement of existing residents.
*	<input type="checkbox"/>	<input type="checkbox"/>	10 Year Rule Documentation (waived for any federally assisted building such as Sec. 8, Sec. 236, Sec. 515 etc.)
*	<input type="checkbox"/>	<input type="checkbox"/>	Provide documentation of placed-in-service date (photocopy of note or other documentation).
*	<input type="checkbox"/>	<input type="checkbox"/>	Provide documentation that current owner has owned the development for 10 years or more (photocopy of seller's warranty deed).
*	<input type="checkbox"/>	<input type="checkbox"/>	Maximum Cost Model - Provide project-specific WHEDA Maximum Cost Model (Appendix F)
*	<input type="checkbox"/>	<input type="checkbox"/>	Evidence that the proposed Management Agent has been approved through WHEDA's Management Agent Certification process.
*	<input type="checkbox"/>	<input type="checkbox"/>	If the applicant is submitting operating expenses outside of the expected ranges, provide a copy of last three (3) years P&L (revenue & expenses) statements for currently operating developments.
*	<input type="checkbox"/>	<input type="checkbox"/>	Detailed listing and/or organizational chart of all individuals or corporate entities that will maintain 20% or greater ownership in the managing member or general partner.









* **Note: Special Application One Submittal Rules for Applicants Targeting Multi-site Acquisition and Rehabilitation of Single Family Homes, Duplexes or fourplexes:** 1) All intended site addresses must be identified in Application One. 2) WHEDA will only require Site Control, Appraisals, and Capital Needs Assessments on 35% of the application's sites at Application One (to help reduce application prep cost). 3) The balance of these materials must be submitted within 120 days of Credit Reservation issuance (i.e. submit with Application Two). 4) The substitution of a limited number of sites at Application Two is allowed if the applicant can demonstrate a) the substitution enhances the development, and b) results in no loss of points.

Self Scoring

2020 Self-Scoring Checklist - Submit with Initial Application Only

Please check the boxes for both the Scoring Category and the attached documentation. If a category is not applicable to your application, check "N/A" in the Scoring Category box only.

N/A	Encl.	SCORING DOCUMENTATION -- SUBMIT WITH INITIAL APPLICATION	
*	<input type="checkbox"/>	<input type="checkbox"/>	Lower-Income Areas (Scoring Category 1)
*	<input type="checkbox"/>	<input type="checkbox"/>	Qualified Census Tracts: Documentation of census tract for site (refer to website American FactFinder - here) located within QCT (Refer to Appendix E) AND a photocopy of Community Revitalization or Redevelopment Plan OR provide website to locate Plan online. Federally designated tribal land: Attach map showing project location with tribal land.
*	<input type="checkbox"/>	<input type="checkbox"/>	Energy Efficiency and Sustainability (Scoring Category 2)
*	<input type="checkbox"/>	<input type="checkbox"/>	Wisconsin Green Built Home or Enterprise Green Communities Standard: Provide architect certification that the building will be built or rehabbed to specific scoring standard.
*	<input type="checkbox"/>	<input type="checkbox"/>	Walkscore: Provide Walkscore.com print out for project location, and point calculation with the application. Walkscore documentation must be no more than 30 days older than the application date. NOTE: refer to scoring category for scattered site requirements
*	<input type="checkbox"/>	<input type="checkbox"/>	Public Transportation: Provide a map or schedule showing that the site is no more than one-half mile from a regularly scheduled bus stop. For properties on tribal land, provide evidence of "on call" transportation programs that provide the users a choice of local destinations.
*	<input type="checkbox"/>	<input type="checkbox"/>	Serves Large Families (Scoring Category 4)
*	<input type="checkbox"/>	<input type="checkbox"/>	Architect's Certification: On Architect's letterhead, certification that units will have ground floor private entrances for new construction or adaptive reuse properties.
*	<input type="checkbox"/>	<input type="checkbox"/>	Supportive Housing (Scoring Category 6)
*	<input type="checkbox"/>	<input type="checkbox"/>	Rental Assistance: Provide evidence of type of rental assistance by providing a copy of the firm commitment. (Refer to Scoring Exhibit.)
*	<input type="checkbox"/>	<input type="checkbox"/>	Appendix S Certification: Provide a fully executed/completed Appendix S form.
*	<input type="checkbox"/>	<input type="checkbox"/>	Rehabilitation/Neighborhood Stabilization (Scoring Category 7) Refer to Scoring Exhibit for detailed scoring criteria.
*	<input type="checkbox"/>	<input type="checkbox"/>	Provide copy of city/tribal support letter. Refer to Scoring Exhibit for details.
*	<input type="checkbox"/>	<input type="checkbox"/>	Provide copy of current rent schedule if currently occupied rental property. Must reflect income of residents and gross monthly rent.
*	<input type="checkbox"/>	<input type="checkbox"/>	Relocation must meet standards established by the Federal Uniform Relocation Act (URL). NOTE: WHEDA prohibits permanent displacement of residents, including those whose incomes are known to or are estimated to exceed tax credit maximums.
*	<input type="checkbox"/>	<input type="checkbox"/>	Provide copy of last three (3) years P&L (revenue & expenses) statements for currently operating developments.
*	<input type="checkbox"/>	<input type="checkbox"/>	Include a map showing property clustering no greater than one-half (1/2) mile radius for non-tribal locations and a letter from the municipality supporting the proposed clustering of sites.
*	<input type="checkbox"/>	<input type="checkbox"/>	Provide copy of fully executed firm commitment from local government and/or private institutions or foundations reflecting a minimum of 5% of total development costs in financial support.
*	<input type="checkbox"/>	<input type="checkbox"/>	Universal Design (Scoring Category 8)
*	<input type="checkbox"/>	<input type="checkbox"/>	Provide Architect's certification that the items checked will be incorporated into the development. (Refer to Self-Scoring Exhibit).
*	<input type="checkbox"/>	<input type="checkbox"/>	Multi-story units requesting roll-in shower points must submit sample floor plan to show the feature is located on an accessible floor level.
*	<input type="checkbox"/>	<input type="checkbox"/>	Eventual Tenant Ownership (Scoring Category 10)
*	<input type="checkbox"/>	<input type="checkbox"/>	Submit Resident Homeownership Plan (Refer to Self-Scoring Exhibit)
*	<input type="checkbox"/>	<input type="checkbox"/>	Development Team (Scoring Category 11)
*	<input type="checkbox"/>	<input type="checkbox"/>	Summary of developer's relevant experience, entire HTC portfolio performance (WHEDA reserves the right to verify), and release of information form and any other supporting documentation that the applicant believes is relevant to document the experience and performance of the Development Team. (Refer to Appendix P and Development Team Experience Form)
*	<input type="checkbox"/>	<input type="checkbox"/>	If requesting points for a Nonprofit Organization acting as Developer and Owner, include materials required for the Nonprofit Set-Aside as noted in Appendix B.
*	<input type="checkbox"/>	<input type="checkbox"/>	Provide the Development Agreement or Memorandum of Understanding between the lead developer and co-developer describing the payment of developer fees and the development duties to be performed by each party.
*	<input type="checkbox"/>	<input type="checkbox"/>	Readiness to Proceed (Scoring Category 12)
*	<input type="checkbox"/>	<input type="checkbox"/>	Documentation of current zoning that allows the intended use, evidenced by a letter from the appropriate local governing body stating the development meets local zoning requirements for the number & type of units.

*			Areas of Economic Opportunity (Scoring Category 13)
*			If requesting points for Median Income or Unemployment Rate, provide documentation of the census tract for the site - (refer to website American FactFinder - here)
*			If requesting School District points, identify the School District that includes the site, along with a map or other documentation confirming that the site is within the identified school district.
*			High Need Areas: if site is not located in or within a 1/2 mile of a designated census tract, provide a copy of the RFP/RFQ and a copy of the award notification.
*			If requesting points for "Access to services and amenities", include a map with distance measurements, clear color photos, contract person, and contact information. At WHEDA's discretion, absence of those items may result in the project not receiving points claimed.

Owner Certification

The Undersigned hereby acknowledges and certifies to Wisconsin Housing and Economic Development Authority (WHEDA), individually, and on behalf of the Applicant and the Development as part of this application for Low-Income Housing Tax Credit (the Credit) for the _____ (the Development) (this Application) as follows:

1. The Development Team is familiar with Section 42 of the Internal Revenue Code and the related rules and regulations there under (the Code) and the rules and requirements of WHEDA (the Requirements) with regard to the Credit, agrees to be bound by the Code and the Requirements and is in compliance with the Code and the Requirements.
2. The information contained in this Application, including all statements and certifications attached hereto, is true and correct and has been prepared with due diligence. The Development Team has an affirmative duty to notify WHEDA with regard to any changes regarding this Application or the Development. The Development Team knows of no facts or circumstances that would threaten or adversely affect the Development and cause the information in this Application to be incorrect or misleading.
1. WHEDA is subject to Chapter 19 of the [Wisconsin Statutes](#) (the Open Records Law). The Development Team hereby consents to disclosure of this Application and related documentation pursuant to the Open Records Law.
2. The Development Team agrees to indemnify and hold harmless WHEDA, its members, officers, employees and agents, from and against any and all claims, suits, damages, costs and expenses arising out of WHEDA's review of and decision with regard to this Application or WHEDA's disclosure of any information pursuant to the Open Records Law. WHEDA makes no representations regarding compliance with the Code or the effect of the Credit on a particular taxpayer. WHEDA review of this Application and related documentation is for its own purposes.
3. Misleading information or representations contained in this Application may result in a revocation of Credit, notification to the Internal Revenue Service and prohibition from participation in the Credit program.
4. The Development Team hereby certifies that the project will be (or has been) constructed in accordance with ADA and Fair Housing Standards.
5. The execution and delivery of this Application and this document is duly authorized and binding on the Development Team.
6. The applicant understands and agrees that all LIHTC application materials and submitted documents may be shared with representatives of HUD and USDA Rural Development under Requirements contained in any Memoranda of Understanding (MOU) executed by and between WHEDA and those agencies.
7. If requested by WHEDA, the applicant/owner agrees to provide accurate, good faith estimates of permanent and/or temporary (construction) jobs to be created or actually created as a result of the Development

Date: _____

Applicant Entity (Initial Application)
Ownership Entity (Subsequent Applications)

Name of Development

By: _____
Its: _____

Co-Developer (Initial Application)

By: _____
Its: _____

By: _____

By: _____

Its: _____

Its: _____

Date: _____

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