

## Instructions/Scoring Summary

### 2021 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

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	2021 Points	Applicant Score	WHEDA Score
1. Lower Income Areas	5	0	
2. Energy Efficiency and Sustainability	20	0	
3. Mixed-Income Incentive	12	0	
4. Serves Large Families	5	0	
5. Serves Lowest-Income Residents	60	0	
6. Supportive Housing	15	0	
7. Veterans Housing	5	0	
8. Rehab/Neighborhood Stabilization	25	0	
9. Universal Design	18	0	
10. Financial Leverage	36	0	
11. Eventual Tenant Ownership	3	0	
12. Development Team	12	0	
13. Areas of Economic Opportunity	28	0	
14. Rural Areas without Recent Tax Credit Awards	8	8	
15. Workforce Housing Communities	12	0	
16. Community Service Facilities	5	0	
<b>Scoring Total</b>	<b>269</b>	<b>0</b>	

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

Reminder: In the General, Preservation and Supportive Housing set-asides, the credit limit will be \$1,400,000 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:

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

Concerted Community Revitalization Plans (CCRPs) must:

1. be geographically specific (the proposed HTC development must be within the identified planning area)
2. include a strategy for obtaining commitments of public and private investment for infrastructure, amenities, or services beyond the proposed HTC development
3. clearly demonstrate the need for revitalization in the planning area
4. include elements such as outcome goals, timelines and benchmarks, and identification of community partners
5. 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.

<b>Maximum 5 Points</b>	<b>Total Points:</b>	<b>0</b>
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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"/>	15	<p><b>Sustainable Design</b></p> <p>Properties built to the Wisconsin Green Built Home Standard (score of 200 or more) or those meeting the Enterprise Green Communities Certification Plus are eligible to receive 15 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"/>	5	<p><b>Public Transportation</b></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>

<b>Maximum 20 Points</b>	<b>Total Points: 0</b>
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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 gross rent limit Section 42 of the Internal Revenue Code 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.

<b>Number of Market Rate Units</b>		<b>0</b>			
<b>Total Units</b>	/	<b>0</b>	=	<b>0.00%</b>	<b>%</b>
<b>Multiplied by 0.80</b>		<b>X 0.80</b>	=	<b>0</b>	<b>Points</b>

<b>Maximum 12 Points</b>	<b>Total Points:</b>	<b>0</b>
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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

<b>Maximum 5 Points</b>	<b>Total Points:</b>	<b>0</b>
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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	0				
CMI Set-Aside Percentage	Number of Units @ CMI	Percentage of Total, (Must equal or exceed 5%)	Multiply Percent by Factor	Total Points	
50%	0	0.0000%	x 0.86	0.0000	
40%	0	0.0000%	x 1.07	0.0000	
30% or lower	0	0.0000%	x 1.29	0.0000	

Maximum 60 Points	Total Points:	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 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.**
- **WHEDA will require that an affidavit be executed and filed by the property manager in the property files attesting that the supportive housing unit was marketed in accordance with the 30 day marketing period requirement.**

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
0	0	0.00%	0

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.

<b>Maximum 15 Points</b>	<b>Total Points:</b>	<b>0</b>
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## 7. Veterans 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 services 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.
- The project is required to hold open a vacant veterans housing unit for a minimum of 30 days or until local collaborative long term veterans service partners, in conjunction with the management agent, finds a person meeting the target veteran definition and requisite income qualifications to lease the unit. After the 30 days, the unit may be leased to any otherwise income qualifying family or individual.
- WHEDA will require that an affidavit be executed and filed by the property manager in the property files attesting that the veterans unit was marketed in accordance with the 30 day marketing period requirement.
- The veterans housing units must 60% CMI or below. Rental subsidies are allowable if supported by firm commitments.

Divide the number of dedicated veterans housing 60% or below low-income units by total number of low-income units.

Veterans housing low-income Units

Total low-income units

	0		
/	0	=	0

Percentage	Points
1-5%	1
6-10%	3
11-100%	5

Maximum 5 Points	Total Points: 0
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## 8. Rehab/Neighborhood Stabilization

Do you wish to claim points for this scoring category?

### NOTE:

- **Projects scoring points in this category cannot score points in the Areas of Economic Opportunity Scoring Category**
- **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 application competition in any city, and no more than one to any developer per application competition.

### 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

<b>Maximum 25 Points</b>	<b>Total Points:</b>	<b>25</b>
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## 9. 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 A117.1-2017. References to section numbers within Universal Design are sections numbers from ICC/ANSI A117.1-2017.

*ANSI Intent Statements have been provided to give brief summaries of referenced section numbers but do not replace actual language found in ICC/ANSI A117.1-2017.*

### Common Area Features

Check box next to all that apply

Check Box	Points	Feature
<input type="checkbox"/>	3	<p><b>Hand rails:</b> 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"> <li>• Cottage style, townhouse, duplex, and single family style are not eligible for handrail points.</li> </ul> <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><b>Automatic Door Openers:</b> 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><b>Accessible Signage:</b> 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><b>Accessible Public Bathroom:</b> 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 1103.12.4 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 1103.12.4 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><b>Minimum 5% of total development units.</b></p> <p>Multi-story units will not receive these points unless:</p> <ol style="list-style-type: none"> <li>1) a sample floor plan is submitted to show this feature is located on an accessible floor level,</li> <li>AND</li> <li>2) at least one bedroom is located on this accessible level floor</li> <li>3) an alternative is to provide single story building(s) with units incorporating this feature</li> </ol> <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	<p>Interior doors intended for user passage shall comply with Section 1103.5, which includes maneuvering clearances, thresholds, clear width, level hardware, etc.</p> <p><i>ANSI Intent Statement: The primary entrance door and other doors intended for user passage must incorporate accessibility features. It is important to avoid improperly designed door openings that do not maintain an accessible route throughout the dwelling unit. Common design flaws include a distance less than 32" between a door opened 90 degrees and the door stop, doors not maintaining proper pull or push side maneuvering clearances or the door hardware not being a lever type. The maneuvering clearances at either side of the door determined by direction of travel and are diagrammed at Figure 404.2.3.2.</i></p>

<input type="checkbox"/>	3	<p>Garbage disposal switch, range hood controls, and electrical receptacles shall meet the requirements of Section 309. At each section of countertop uninterrupted by a sink or appliance; as long as one accessible electrical receptacle is provided then other non-accessible receptacles may also be provided.</p> <p><i>ANSI Intent Statement: Section 309 states that operable parts must be located within one of the reach ranges specified in Section 308. Within a kitchen, the obstructed side reach is the most often scenario encountered by a wheelchair user and is defined as the ability to reach a maximum of 24" over an object with the maximum height of 34" to a surface a maximum of 46" high on the far side. A common solution to bring operable parts such as switches and receptacles closer to the user is to have these items mounted on the face of the kitchen cabinets. Another available solution would be extending the operable parts such as switches and receptacles through a full height backsplash which maintains the maximum 24" distance from the face of backsplash to the lip of the counter.</i></p>
<input type="checkbox"/>	3	<p>Provide minimum one accessible work surface that meets all requirements of Section 1103.12.3 including top of counter at 34" above the floor, minimum 30" wide, and a clear floor space for forward approach.</p> <p><i>ANSI Intent Statement: The work surface is a kitchen design feature that would allow a wheelchair user to work at the counter with their knees beneath the working surface. Removable casework is often provided beneath the work surface but the floor and wall finishes shall extend beneath the cabinet and the removal of the cabinet shall occur without modifications to the work surface. There must be a 30" wide opening beneath the work surface when the removable cabinet is removed to allow for forward approach below the work surface.</i></p>
<input type="checkbox"/>	3	<p>Entrance doors to the unit shall comply with Section 404 including delayed action closers, maneuvering clearances, low profile threshold, and door hardware. A screen door or storm door may be added in addition to the entrance door with installation method to allow for management to remove screen door or storm door at tenant request.</p> <p><i>ANSI Intent Statement: The entrance door to the dwelling unit requires additional maneuvering clearances because a closer and latch are provided at this door. The maneuvering clearances at the interior and exterior side of the door are determined by direction of travel and are diagramed at Figure 404.2.3.2.</i></p>
<input type="checkbox"/>	2	<p>Where operable windows are provided, provide at least one window in each sleeping, living, and dining space complying with all of Section 309 including the following: are easily grasped with one hand without tight grasping, pinching, or twisting of the wrist; and are located no more than 48" above the floor. Provide 30" x 48" clear floor space for forward or parallel approach centered on the window.</p> <p><b>Minimum 10% of total development units.</b></p> <p><i>ANSI Intent Statement: Section 309 provides accessible design guidance on operable parts. This section is not specific to describing operable windows but has been applied to the window controls for the purpose of this point. Window locking mechanism to be within reach range and crank window must be ADA compliant style.</i></p>
<input type="checkbox"/>	2	<p>Carpet shall have 1/2" maximum pile and meet all requirements of Section 302.2</p> <p><i>ANSI Intent Statement: Flooring properties are an important factor to those with mobility impairments as they should not restrict movement of a wheelchair or provide tripping hazards at flooring transitions. Carpet pile is limited to 1/2 inch maximum in height. Transitions over 1/4 inch in height and less than 1/2 inch shall be beveled.</i></p>
<input type="checkbox"/>	1	<p>Unit light switches shall be Rocker type light switches.</p>

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	<p>100% visitable units. Provide an accessible route from accessible parking stalls to all dwelling units. Accessible routes shall meet all requirements of Section 402 including Section 404 for accessible doors. The living room, kitchen and minimum of one bathroom (with a minimum of a toilet and sink) must be on the accessible route from the unit entry. Bathroom shall meet the requirements of Sections 1104.11.</p> <p><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 1104.11 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></p>
<input type="checkbox"/>	1	<p>Toilets in units shall have clearances that meet requirements of Section 1104.11.3.1.2.</p> <p><i>ANSI Intent Statement: All sections referenced are describing the various clearance options at the toilet and are diagramed at Figure 1004.11.3.1.2 for easier reference. Section 1004.11.3.1.2.2.2 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></p>
<input type="checkbox"/>	3	<p>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.</p> <p><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></p>
<input type="checkbox"/>	2	<p>Provide reinforcement for the future installation of grab bars at toilets, bathtubs, and shower compartments per Section 1103.11.1. 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.

<b>Sum of Items Checked:</b>	<b>0</b>
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<b>Sum of checked items</b>	<b>Max Points</b>
34 and over	18
27-33	14
21-26	10
14-20	6
6-13	3

<b>Maximum 18 Points</b>	<b>Total Points:</b>	<b>0</b>
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## 10. Financial Leverage

Do you wish to claim points for this scoring category?

Is this project financed with Historic Tax Credits?

Is this project applying in the Rural Set-Aside?

If this is an additional credit application, please enter the original Annual Housing Tax Credits Attributable to Residential Areas (from prior years) into the Prior Annual Housing Tax Credits Attributable to Residential Areas field.

<b>Annual Housing Tax Credits Requested Subtotal</b>	\$0
<b>Prior Annual Housing Tax Credits Awarded</b>	\$0
<b>Annual Housing Tax Credits Total</b>	\$0
<b>Total Development Costs</b>	\$0
<b>Times Annualized Adjustment Factor To Adjust Costs</b>	x 0.115
<b>Divided By Adjusted Development Costs</b>	/ \$0 = <b>0.0%</b>

### Non-Rural Set-Aside Projects

Percentage	Points
0-53%	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%	12
75.1-100%	0

### Rural Set-Aside Projects

Percentage	Points
0-66%	36
66.1-69.0%	32
69.1%-72.0%	28
72.1%-75%	24
75.1%-78.0%	20
78.1%-81.0%	16
81.1%-85%	12
85.1%-100%	0

<b>Maximum 36 Points</b>	<b>Total Points: 0</b>
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\*Note - Projects financed with Historic Tax Credits are eligible for a maximum of 32 points.

## 11. 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?
- 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.

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.

<b>Maximum 3 Points</b>	<b>Total Points:</b>	<b>3</b>
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## 12. 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

		Primary Developer	Co-Developer
Developer Quality Scoring		Radio Button	Radio Button
<b>Development Team</b>			
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	<input type="radio"/>	<input type="radio"/>
Two or more properties in Wisconsin or more than five HTC properties in all states	1	<input type="radio"/>	<input type="radio"/>
	CLEAR SECTION	<input checked="" type="radio"/>	<input checked="" type="radio"/>
B. Years of HTC and multifamily experience			
Six years of development experience and four years of HTC experience	2	<input type="radio"/>	<input type="radio"/>
Two or more properties in Wisconsin or more than five HTC properties in all states	1	<input type="radio"/>	<input type="radio"/>
	CLEAR SECTION	<input checked="" type="radio"/>	<input checked="" type="radio"/>
C. Minority Developers			
Applications that include a minority developer or minority co-developer that have at least 49% stake in all aspects of the development including but not limited to ownership, cash-flow, and voting rights.	3	<input type="radio"/>	<input type="radio"/>
Applications that include a minority developer or minority co-developer that have at least 24% stake in all aspects of the development including but not limited to ownership, cash-flow, and voting rights.	2	<input type="radio"/>	<input type="radio"/>
	CLEAR SECTION	<input checked="" type="radio"/>	<input checked="" type="radio"/>
<i>Note: Controlling entity minority member must have acceptable previous experience in the development and/or operation of housing similar to that proposed in the application, or is a recent graduate of Marquette University's Associates in Commercial Real Estate program (or an equivalent program at another educational institution). Controlling entity minority member must be a certified minority business. Evidence of certified minority business designation can be satisfied by providing Federal, State, Local, or ACRE certification to WHEDA. Controlling entity minority members are also permitted to request a WHEDA minority certification no later than 30 days in advance of the application deadline.</i>			
D. WHEDA evaluation of capacity, delivery of prior HTC properties and timely & accurate completion of prior HTC applications and awards			
	3	<input type="radio"/>	<input type="radio"/>
	2	<input type="radio"/>	<input type="radio"/>
	1	<input type="radio"/>	<input type="radio"/>
	CLEAR SECTION	<input checked="" type="radio"/>	<input checked="" type="radio"/>
<b>Development Team Members (Maximum of 2 Points)</b>			
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 only.	2	<input type="radio"/>	<input type="radio"/>
Two points will be awarded for applications that include an organization, acting as lead Developer and an Owner, that has participated in fewer than 4 HTC properties as a lead developer or owner.	2	<input type="radio"/>	<input type="radio"/>
	CLEAR SECTION	<input checked="" type="radio"/>	<input checked="" type="radio"/>

*Note: 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.

	0	0
Subtotals:	0	0
<b>Total:</b>	<b>0</b>	<b>0</b>

<b>Maximum 12 Points</b>	<b>Total Points:</b>	<b>0</b>
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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, DPI Accountability Score, High Needs Area and Rent Burden points can be found in Appendix R.

Description	Available Points	Radio Button
Median Income in the Census Tract. Points will be awarded to properties in census tracts at/or above 120% of County Median Income (5 points) and tracts between 100% and 119% of County Median Income (3 points).	5	<input type="radio"/>
	3	<input type="radio"/>
	CLEAR SECTION	<input checked="" type="radio"/>
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). WHEDA will require that the project must be a family or mixed population development and maintain at least 20% of the units as 3 bedroom or larger.	5	<input type="radio"/>
	3	<input type="radio"/>
	CLEAR SECTION	<input checked="" type="radio"/>
Rent Burden. 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 (5 points) and properties located in counties in which 47% or more of renters pay at least 30% of their income toward rent (3 points).	5	<input type="radio"/>
	3	<input type="radio"/>
	CLEAR SECTION	<input checked="" type="radio"/>
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"> <li>• RFP/RFQ Notes:               <ul style="list-style-type: none"> <li>○ 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.</li> </ul> </li> </ul>	5	<input type="radio"/>
	CLEAR SECTION	<input checked="" type="radio"/>
<b>Section Subtotal:</b>		<b>0</b>

#### 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 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

Select Population Type:  Senior  Family/Supportive

Item	Check Box	Points Granted
Full Service Grocery Store (2 points)*	<input type="checkbox"/>	0
Public Elementary, Middle or High School (N/A for Senior)	<input type="checkbox"/>	0
Senior Center (2 points) (N/A for Family/Supportive)	<input type="checkbox"/>	0
Full Service Medical Clinic or Hospital**	<input type="checkbox"/>	0
Library ***	<input type="checkbox"/>	0
Public park with playground equipment or athletic facilities, or hiking/biking trail	<input type="checkbox"/>	0
Job-Training Facility, Community College or Continuing Education Programs ****	<input type="checkbox"/>	0
<i>On-site services and amenities</i>		
In-unit internet at no cost to residents (2 points) *****	<input type="checkbox"/>	0
On-site community room dedicated for residents	<input type="checkbox"/>	0
<b>Section Subtotal:</b>		<b>0</b>

\*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, state kiosk, express 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.

<b>Maximum 28 Points</b>	<b>Total Points:</b>	<b>0</b>
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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 competitive Housing Tax Credit Award in the previous five years.**

**For 2021, the project must be located in one of the following counties:**

- ASHLAND, BARRON, BUFFALO, BURNETT, CLARK, DUNN, FLORENCE, FOREST, GREEN LAKE, IRON, JACKSON, JUNEAU, KEWAUNEE, LANGLADE, MANITOWOC, MARQUETTE, MENOMINEE, PEPIN, POLK, PRICE, RICHLAND, RUSK, SHAWANO, TAYLOR, TREMPLEALEAU, VERNON, VILAS, WASHBURN, WAUSHARA

**For 2021, projects located in any of the following counties do not qualify:**

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

<b>Maximum 8 Points</b>	<b>Total Points:</b>	<b>0</b>
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## 15. Workforce Housing Communities

Do you wish to claim points for this scoring category?

Up to four points will be awarded for each of the items below. A list of counties/municipalities that qualify for Top Job Centers and Net Job Growth points can be found in Appendix V.

Description	Available Points	Radio Button
<b>Top Job Centers.</b> Points will be awarded to properties located in a geographical area that added 400 jobs or more in the past 5 years (4 points) or to properties located in a geographical area that had positive job growth of fewer than 400 jobs in the past 5 years (2 points).	4	<input type="radio"/>
	2	<input type="radio"/>
	CLEAR SECTION	<input checked="" type="radio"/>
<b>Net Job Growth.</b> Points will be awarded to properties located in a geographical area that experienced job growth of 5% or greater in the past 5 years.(4 points) or to properties located in a geographical area that experienced job growth between 3% and 4% in the past 5 years (3 points) or to properties located in a geographical area that experienced job growth between 1% and 2% in the past 5 years (2 points).	4	<input type="radio"/>
	3	<input type="radio"/>
	2	<input type="radio"/>
	CLEAR SECTION	<input checked="" type="radio"/>
<b>Individual Employer Growth:</b> A community is eligible if an individual employer has added at least 50 net jobs (for permanent employees of the company) in that community during the last five years, and can provide sufficient documentation signed by an authorized representative of the company to prove the growth.	4	<input type="radio"/>
		CLEAR SECTION

Maximum 12 Points	Total Points:	0
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## 16. Community Service Facilities

Do you wish to claim points for this scoring category?

### NOTE:

- **Preservation Housing Set-Aside applications cannot score points in this category**

Properties in a Qualified Census Tract, which also includes a job/skill training center or employment counseling center (or similar facilities) as a Community Service Facility included in eligible basis are eligible for 5 points based on these criteria:

- Include an attachment that clearly identifies the costs, basis and LIHTC's attributable to the Community Service Facilities broken out from the other costs in the project budget.
- WHEDA expects that the per-square-foot costs of the Community Service Facilities will be significantly below the per-square-foot costs for the residential portion of the property
- Include an executed Memorandum of Understanding between the property owner and the operator of the Community Service Facility including but not limited to a description of the use of the property, the services provided, a statement that the services are available throughout the year, and a statement that the facility was used primarily to provide services for individuals whose income is 60% or less than the area's median gross income.
- Include a statement that any fees charged for the services provided in the facility must be affordable to persons at or below the 60% income level.
- The need for the services provided by the Community Service Facility must be stipulated in the project's market study.
- Commercial rent collected from the Community Service Facility space may not be included in the tax credit application for the purposes of calculating Debt Service Coverage Ratio.
- The amount of community service facility basis is limited to 25 percent of the first \$15 million of eligible basis of the project plus 10% of the remaining total Eligible Basis of the project. See IRS Code Section: I.R.C. § 42(d)(4)(C)(ii)
- Applicants with community service facilities should consult with their tax or legal counsel before selecting points in this category.

*Note: WHEDA will not grant points for project amenities including but not limited to community room, community building, fitness center, resident computer center, or onsite leasing office. WHEDA is the sole arbiter on the appropriateness of points in this category. Applicants are encouraged to consult with WHEDA staff regarding documentation in advance of submitting their application*

Maximum 5 Points	Total Points:	0
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