CONNECTICUT
HOUSING FINANCE
AUTHORITY

LOW-INCOME HOUSING TAX CREDIT (LIHTC) PROGRAM

2022 and 2023 Qualified Allocation Plan (QAP)

ANNUAL OVERVIEW SESSION
October 13, 2021

CONNECTICUT HOUSING FINANCE AUTHORITY

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INTRODUCTION AND POLICY

QUALIFIED ALLOCATION PLAN

TERRY NASH GIOVANNUCCI, CHFA

CHFA's Board of Directors Task Force

- Role of Allocating Agency
- Alignment with the State's housing policy
- Production and outcomes driven by current policy
- Public input – comment periods and working groups

Broad Policy Changes

- Two-year QAP 2022 *and* 2023
- Two new Classifications:

  Preservation

  New Construction
- Target split:

  25% / 75%

Preservation Classification

- Completed Applications to be evaluated solely on their satisfaction of specific Preservation priorities
- No points awarded
- Competition within the category

Preservation Classification

- Greatest need:
- Connection to Community Revitalization
- Expiring use restrictions or re-syndication
- Preservation of housing tied to opportunity areas
- Energy efficiency and sustainability
- Experienced developer

Continuing Broad Policy Goals

- Rental Affordability and Special Needs (Supportive) Housing
- Family Focus – Non Age Restricted Housing
- Sustainable Design
- Deconcentrating Poverty

2022 Application Year Qualified Allocation Plan

Important Updates

- ***New Preliminary Application form available online***
- ***Preliminary Application guides the Pre-application Conference discussion***

Reminder: Applicants that have received prior LIHTC awards will not be eligible to submit a LIHTC application for additional development(s) unless previously awarded developments are on track to meet benchmarks

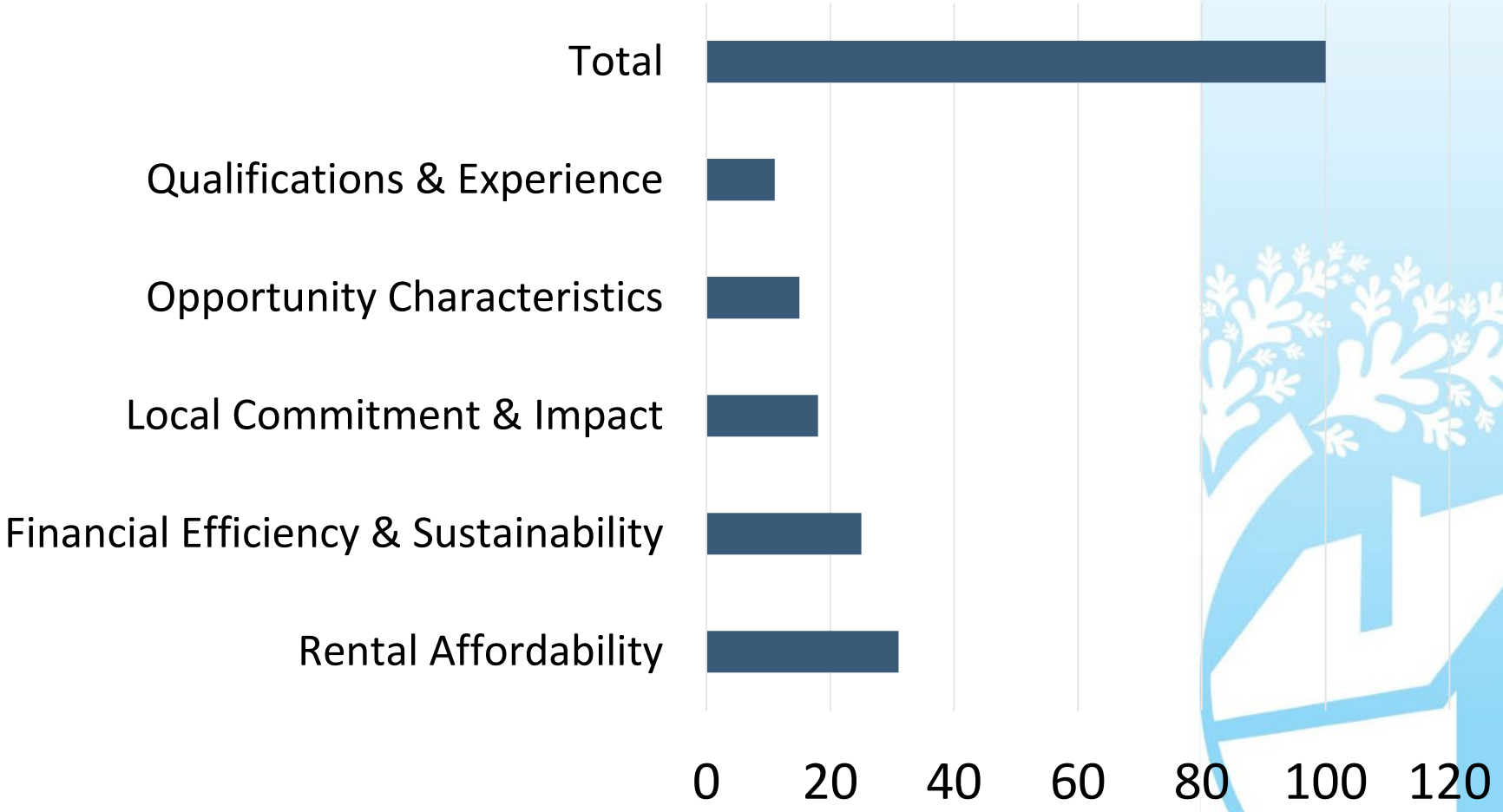
2022 and 2023 QAP

Credit Limits

- 9% Credit not to exceed $30,000 per qualified unit and
- 20% of the population component of the 2022 Credit Ceiling
- 4% Credits available to tax-exempt bond financed projects limited to the amount of Credits necessary for the financial feasibility of the project

2022 and 2023 QAP

Weight of Priorities in Points



2022 and 2023 QAP

QAP Point Categories	2020 Max Points	Change	2022 and 2023 Max Points
Rental Affordability	**34**	**-3**	**31**
a. Supportive Housing Units	6		6
b. Serves Households Below 30% AMI	7	**1**	8
c. Serves Households 30% to 50% AMI	6	**1**	7
d. Mixed Income Housing	6		6
e. ~~Preserves At-Risk Affordable Housing~~	4	**-4**	0
Extended Affordability Commitment	0	**2**	2
~~Production and Preservation of Units~~	4	**-4**	0
f. On-site Resident Services Coordinator	1	**1**	2

2022 and 2023 QAP

QAP Point Categories	2020 Max Points	Change	2022 and 2023 Max Points
Financial Efficiency and Sustainability	**25**	**0**	**25**
a. Cost Effectiveness, Hard Costs	3	**-1**	2
b. Credits Per Qualified Bedroom	5	**-1**	4
c. Credit Equity <50% of Total Uses	4	**-2**	2
d. Other Permanent Funding Sources	1		1
e. Building Plans and Specs (≥90% complete)	1		1
f. Sustainable Design (energy saving measures)	7	**6**	13
g Cost Effectiveness, Intermediary Costs	4	**-2**	2

2022 and 2023 QAP

QAP Point Categories	2020 Max Points	Change	2022 and 2023 Max Points
Local Commitment & Impact	**15**	**0**	**18**
a. Priority Location (C&D Plan)	5		5
b. Transit Oriented Development	4		4
c Family Developments	1		1
d Signed Agreements	1		1
e Historic Place/Adaptive Re-Use/Brownfield Dev	3		3
g. Located in Qualified Census Tract	1		1
h Concerted Community Revitalization Plan	0	**3**	3

2022 and 2023 QAP

QAP Point Categories	2020 Max Points	Change	2022 and 2023 Max Points
Opportunity Characteristics	**15**	**0**	**15**
a. Municipalities with less Deed Restricted Housing	6		6
b. Development Located in an Area of Opportunity	9		9

2022 and 2023 QAP

QAP Point Categories	2020 Max Points	Change	2022 and 2023 Max Points
Qualifications & Experience	**11**	**0**	**11**
a. Experience of Sponsor/GP	5		5
b. Developer/Sponsor Resources	3		3
c. Women and Minority Participation	2		2
d. Connecticut-Based Contractor	1		1

2022 9% LIHTC ROUND

PRELIMINARY APPLICATION

AND

POINTS CHANGES

DEBBIE ALTER, CHFA

Important Dates

- October 15, 2021: SHPO and CEPA pre-application notifications due
- Now – November 19, 2021: Preliminary Applications accepted
- November 1, 2021 – December 10, 2021: Pre-Application Conferences take place
- December 7, 2021: Applications due for Taxable Bonds
- December 31, 2021: Soft letters issued for Taxable Bonds
- January 5, 2021: Sharepoint site request deadline
- January 12, 2022: 9% LIHTC applications due by 4:00 PM

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Preliminary Application Process

- All potential 9% LIHTC Applicants are required to submit a Preliminary Application to CHFA
- The form is found on CHFA's website chfa.org; there is a Quick Link on the homepage
- The Preliminary Application form must be downloaded; it cannot be completed online
- No other exhibits are required with the submission
- Preliminary Applications must be emailed to PreliminaryApplication@chfa.org no later than November 19, 2021

Pre-Application Conferences

- Following receipt of a Preliminary Application, CHFA staff will schedule a virtual pre-application conference
- Participants will include CHFA and DOH underwriting and architectural staff
- Applicants may include any members of their development team
- Pre-application conferences are expected to take place between November 1, 2021 and December 10, 2021

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Changes to Points in the 2022-2023 QAP

- **Only the New Construction classification will be scored**

Rental Affordability Section Changes

- **Maximum points increased for number of units serving households at or below 30% and 50% of AMI**
- **2 points for developments receiving 6+ points in the Opportunity Characteristics category that commit to 50+ years of affordability**
- **On-site Resident Services Coordinator category enhanced to award 1 point for part-time or 2 points for full-time**

Changes to Points in the 2022-2023 QAP

Financial Efficiency & Sustainability Section

- Most criteria for points have not changed; however, maximum points have decreased
- Sustainable Design criteria has changed

Changes to Points in the 2022-2023 QAP

Local Impact Section

- Most criteria and points have not changed from previous QAP
- Transit Oriented Development category changes
  - Points removed for mixed-use
  - Points added for proximity to amenities
- Concerted Community Revitalization Plan and/or Affordable Housing Plan category added

Changes to Points in the 2022-2023 QAP

Revitalization or Affordable Housing Plan criteria

- **(i) As of the preliminary application deadline under this Plan, the State, municipality, or other regional, community or municipally-recognized organization or group formally adopted a concerted community revitalization plan to revitalize a defined geographic area which includes the site of the Proposed Development, provided, however, a standard land use or comprehensive plan will not be eligible unless it contains a specific revitalization component;**

Changes to Points in the 2022-2023 QAP

Revitalization or Affordable Housing Plan criteria

- **(ii) The State, municipality, or other regional, community or municipally-recognized organization or group certifies that no principal initiated the adopted concerted community revitalization plan (other than a public housing authority or a related entity)**
- **(iii) The completion of the Proposed Development would contribute to one or more of the concerted community revitalization plan's stated goals; and**

Changes to Points in the 2022-2023 QAP

Revitalization or Affordable Housing Plan criteria

- **(iv) The State, municipality, or other regional, community or municipally-recognized organization or group has made, or is committed to making, specific investments in non-housing infrastructure, amenities, or services beyond the Proposed Development.**

Changes to Points in the 2022-2023 QAP

Opportunity Characteristics

- **Points have not changed for locations in a municipality identified on the *"Affordable Housing Appeals Procedure List"***
- **Development Located in Area of Opportunity**
  - **Criteria to qualify for points has not changed, must be non-age restricted with 50% or more of the total units containing two or more bedrooms**
  - **Mapping tool has changed**

Changes to Points in the 2022-2023 QAP

Qualifications and Experience

- No changes to categories or points values in this section

OPPORTUNITY MAPPING

JONATHAN CABRAL, CHFA

Opportunity Mapping

- DOH adopted an opportunity map to guide investment
- CHFA adopted a separate LIHTC opportunity map that gave points based on individual characteristics
- While the two maps were similar in their intent, they were significant differences

Former CHFA Opportunity Characteristics Map

- Map is based on the municipal level data
- Binary in nature… how a town compares to the state average
- Points awarded based on individual characteristics:
  - Non-exempt town on 8-30g list
  - School performance
  - Poverty Level
  - Jobs to Population Ratio
  - Proximity to a community college

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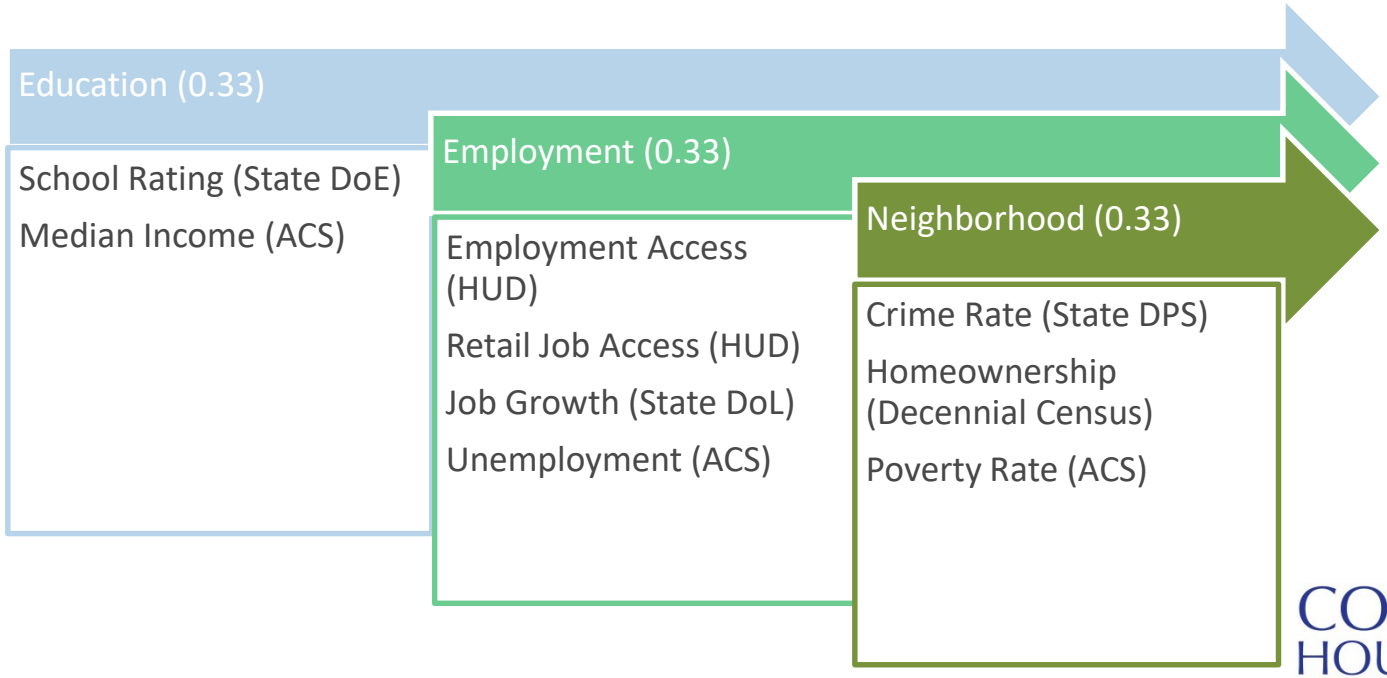
One Shared Opportunity Map

- DOH commissioned a new statewide opportunity map
  - Developed with support from the CT Fair Housing Center and the Open Community Alliance
  - CHFA asked to provide input
- One shared map between DOH & CHFA will reduce confusion



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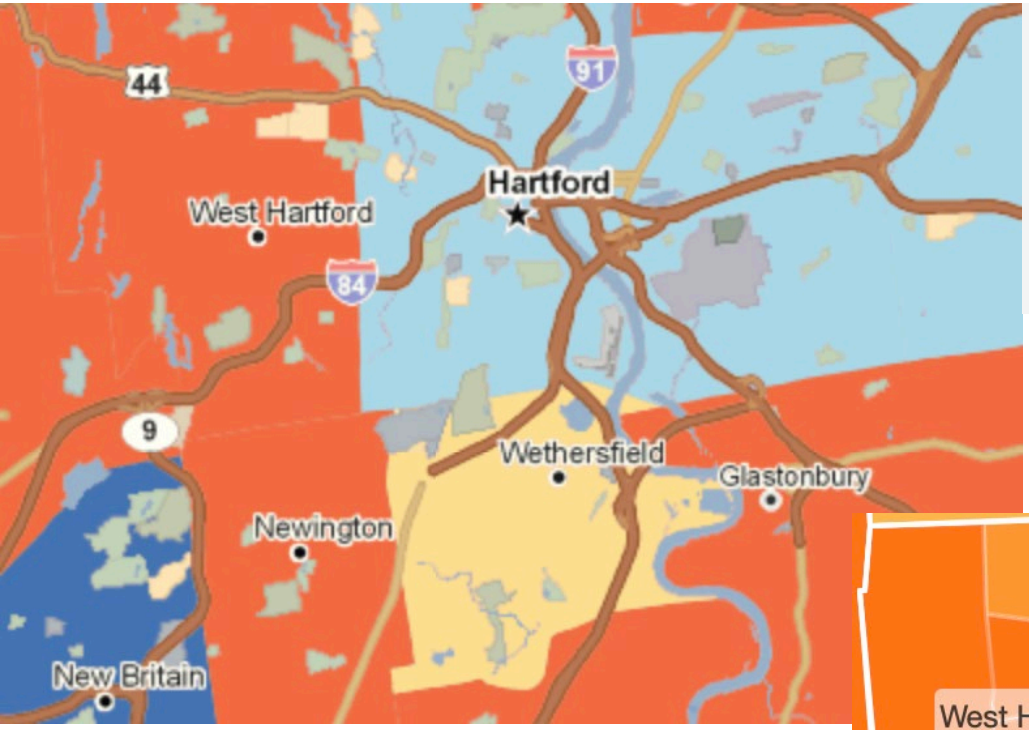
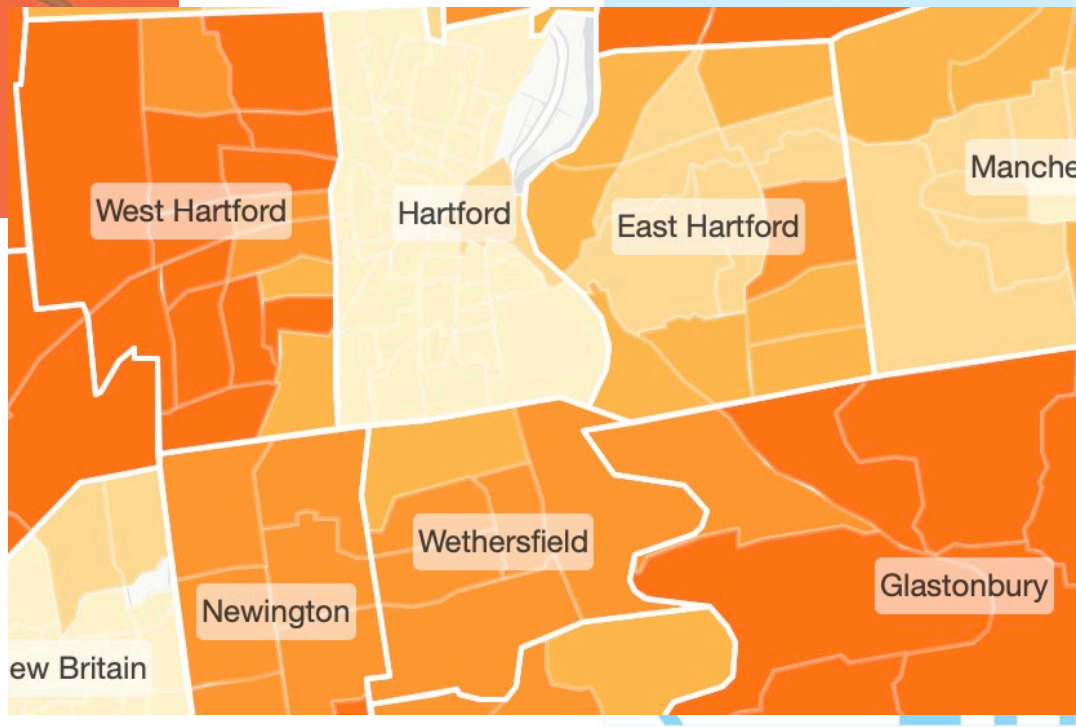
Former CHFA's Opportunity Characteristic Map



- 4 or less
- 5 - 8
- 9 - 11
- 12 or more

Source: CHFA

New State Opportunity Map



Index

- Very High
- High
- Moderate
- Low
- Very Low

4. ***Opportunity Characteristics***.

(a) Municipalities with Less Assisted and Deed Restricted Housing. Points shall be awarded to Proposed Developments located in a municipality where there is less than 10% assisted and deed restricted housing according to the definition in Section 8-30g(k) of the Connecticut General Statutes and identified on the "*Affordable Housing Appeals Procedure List*" published by DOH.

6 Points

(b) Development Located in Area of Opportunity. For purposes of the Plan, "Development Located in an Area of Opportunity" shall mean a Proposed Development with non-age restricted units of which more than 50% of the Proposed Development's total units contain two or more bedrooms, and that is located in a municipality with measured improvements in family outcomes in education, employment and neighborhood domains. Points will be awarded in accordance with DOH/Authority "*Opportunity Map*" published on the Authority's website, as follows. Please see the Opportunity Characteristics Guideline for further detail.

Census Tract Designations	Points
Very High	9
High	8
Moderate	6
Low	2
Very Low	0

Link to New Opportunity Map

2022 9% LIHTC ROUND

PROCESS,

UNDERWRITING

AND

HELPFUL HINTS

DEBBIE ALTER, CHFA

Submission of 9% LIHTC Applications

- Applications (including all required exhibits) must be uploaded to SharePoint no later than 4:00 pm on January 12, 2022
- SharePoint sites must be requested by January 5, 2022
- A check for the non-refundable application fee must be sent to CHFA's office

LIHTC Application Fees:

- For-profit applicants: $1,000
- For-profit applicants (less than 20-units): $500
- Not-for profit applicants: $250

Taxable Bond Financing Application Fees:

- For-profit applicants: $2,500
- Not-for profit applicants: $1,250

9% LIHTC Review Process

- **All threshold items must be submitted for an application to be considered**

Caution: There is no deficiency period and applications must be complete

- **CHFA reserves the right to request clarification on submissions; however, no new information will be accepted**
- **Clarification calls are anticipated to take place in February/March 2022**

9% LIHTC Review Process

- **Points review calls will be offered to applicants upon completion of the scoring, targeted for April 2022***
- **Recommendations for awards are anticipated to be presented to the CHFA Board of Directors at its meeting April 28, 2022***

**Dates shown here are tentative and subject to change*

Underwriting Standards

- 1.15 minimum Debt Service Coverage Ratio (DSC) at year one, 1.0 minimum DSC without utilizing reserves for the 15 year compliance period

- Developer Allowance/Fee Up to 15% of Total Construction and Soft Costs in accordance with the sliding scale found in the CHFA Procedures

See Multifamily Underwriting Standards Summary

Underwriting Standards

- **Trending: 2% Income**
  3% Expenses

- **Applicants should refer to the CHFA Per Unit Operating Expense Range Guidelines**

NOTE: The Operating Expense Range amounts are for the current year and must be trended 3% each year to the proforma stabilized year

See Multifamily Underwriting Standards Summary

Basic Threshold Requirements

- Credible Financing Plan required
  - Firm commitments for funding must be submitted for all proposed sources, with the exception of DOH funding
  - The information on Ex. 6.5 Sources of Funds must agree with the commitment letters and/or letters of interest
- Applications for DOH funding are submitted simultaneously

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Basic Threshold Requirements

- 20% of the total units must be targeted to households above 30% AMI and at or below 50% AMI
- 40 year affordability commitment is required
- See QAP for complete list of Basic Threshold Requirements

Income Averaging Minimum Set Aside

- Applications may propose the use of the Income Averaging Minimum Set Aside
- Requirements for the use of Income Averaging can be found in the LIHTC Guidelines on CHFA's website
  - CHFA requirements may be superseded at any time by IRS guidance
- Applicants and Managing Agents need to understand the potential compliance challenges

Qualified Development Team

- Applicants must comply with CHFA's Program Eligibility Requirements
- Architects and General Contractors must be licensed in Connecticut
- Management Companies must be approved by CHFA

Development Team Capacity

- **Applicants will be evaluated on past performance:**
  - **Ability to meet established timelines**
  - **Deviation from proposed costs**
  - **Execution of proposals as originally submitted**
  - **Compliance with tax credit and other funding programs**
  - **Successful operation of developments**
- **Applicants are encouraged to review the capacity of all Development Team Members**

Hybrid Financing Structures

- Must be of a scale to produce demonstrable savings of scarce resources and increased production of affordable housing units
- Applicants must discuss the intention to submit a hybrid financing proposal at the pre-application conference
- Proposal must meet criteria outlined in the QAP and Hybrid Financing Structure Guideline

Helpful Hints - Points

- Supportive Housing Units:
  - Provide a supportive services plan prepared by a Qualified Service Provider
  - Include a budget for the supportive services
  - Must demonstrate a plan to obtain funding for supportive services that will be sustainable for at least 15 years
    - If it is expected that there will be a pre-funded service reserve, it must be included in the development budget
    - If the expenses will be carried in the operating budget, the application must reflect this

Helpful Hints - Points

- **Supportive Housing Units (cont.)**
  - **If the supportive housing units are not covered by rent subsidies, do not assume the tenants will have sufficient income to pay tax credit rents**
  - **Assume that when connected to services, the tenant will receive SSI income of $794 per month**
  - **Rental income assumption cannot exceed $238 for supportive housing units**

Helpful Hints - Points

- Other Permanent Funding Sources :
  - Non-debt sources
  - Does not include state-administered funds or developer funds
  - Non-Debt Commitments should be firm and quantifiable over 20 years

Helpful Hints - Points

- Other Permanent Funding Sources (cont.):
  - Land contribution requires an appraisal no older than 12 months from the application due date
    - CHFA may adjust the value for negative conditions
  - Tax agreement requires evidence of approval and applicant must provide a calculation of its value

Helpful Hints - Points

- Other Permanent Funding Sources (cont.):
  - Funds from a housing authority or municipality may be counted; see definition of “Municipal Resources” in the Glossary for more information
- Cost Effectiveness, Intermediary Costs:
  - Third-party services related to project development
  - CHFA will determine which costs must be included in the calculation

Helpful Hints - Points

- Priority Locations
  - Map found on OPM website
  - Local bus stop is not a mass-transit station
  - Maps and schedules may be provided to evidence existence of local bus service provided 7 days a week within ½ mile of the development

Helpful Hints - Points

- Experience of the Sponsor/Applicant/GP
  - Points awarded on experience of principal or entity
  - Applicant established as a joint venture which includes a participant with LIHTC experience may qualify for points upon CHFA determination provided the Applicant partners with a property management company with appropriate LIHTC Experience
- Evidence of material participation by the co-sponsor(s) will be required

Helpful Hints - Points

- Developer/Sponsor Resources:
  - An investment in the permanent sources of funds exclusive of a deferred developer's fee and tax credit equity
  - Evidence funds are available and allocated to the developer is required

Helpful Hints - Points

- Developer/Sponsor Resources (cont.)
  - Land contribution is evidenced by an as-is appraisal no older than 12 months from application due date
    - CHFA may adjust the value for negative conditions
  - Project specific competitive grants, pass-through loans obtained by a developer/owner or project cost savings cannot be used to offset the commitment of Developer Resources

CHFA Taxable Bond Financing

- CHFA is offering taxable bond financing for use with the upcoming 9% LIHTC Round:
  - Construction-Only Financing
  - Construction-to-Permanent Financing
  - Permanent-Only Financing
- Applications will be accepted via e-mail with reduced documentation
- Terms and a list of required documents may be found on the CHFA website

CHFA Taxable Bond Financing

- Applicants are encouraged to explore all financing options
- Multiple letters of financing interest will be accepted for review
- The use of CHFA financing will not affect the review or scoring of a 9% LIHTC application
- Applications must be emailed to PreliminaryApplication@chfa.org by 4:00 PM December 7, 2021

CHFA Taxable Bond Financing

Construction-Only Product*

- Rate is fixed at 3.0% so long as the loan closes by November 30, 2022
- Term not to exceed 24 months
- Interest-only payments due until maturity
- Pre-payment available in month 16
- CHFA Underwriting Standards apply

*See Product Description on CHFA website for full details

CHFA Taxable Bond Financing

Construction-to-Permanent Product*

- Utilizes the two-note structure
- Construction loan rate 3.0% if loan closes by November 30, 2022
- Permanent loan rate based on 10-Year Treasury rate plus 250 basis points
- Construction term not to exceed 24 months
- Permanent loan term 37 years (includes construction term)
- Interest-only payments during construction

*See Product Description on CHFA website for full details

CHFA Taxable Bond Financing

Construction-to-Permanent Product (cont.)*

- Prepayment of construction loan available at month 16
- Permanent loan payment amortized over 35 years; monthly amortized payments commence on month 25
- Prepayment of permanent loan allowed in accordance with CHFA Preservation of Housing Affordability policy statement
- CHFA Multifamily Underwriting Standards apply

*See Product Description on CHFA website for full details

CHFA Taxable Bond Financing

Permanent-Only Product*

- Fixed rate based on the 10-Year Treasury rate plus 300 basis points
- Rate is locked no sooner than 30 days before construction loan closing
- Loan term of 35 years
- One-time full disbursement at permanent loan closing
- Permanent loan closing must occur 25 months from the construction closing; this may be extended six additional months subject to a fee of $5,000 per month
- CHFA will issue a loan commitment at the time of construction closing

*See Product Description on CHFA website for full details

CHFA Taxable Bond Financing

Permanent-Only Product*

- Loan will be sized using the current rents at time of construction closing without trending rents during construction
- Commercial income may not be used to size the loan
- A non-refundable Forward Standby Fee of 1% of the loan amount is due at construction closing
- A Forward Good Faith Deposit Fee of 1% of the loan amount is due at construction closing and is refundable at the permanent loan closing
- All other CHFA Fees and Standard Underwriting Guidelines apply

*See Product Description on CHFA website for full details

CHFA Taxable Bond
Permanent Only Financing

Permanent-Only Product*

- Conversion Conditions include
  - Updated underwriting to confirm income, expenses, debt service coverage, etc. at rent up
  - 100% qualified occupancy of LIHTC units
  - 100% retirement of the construction loan
  - Satisfaction of CHFA's typical final closing conditions

*See Product Description on CHFA website for full details

TECHNICAL SERVICES GUIDANCE

SEEMA MALANI, CHFA

QAP Points Overview – Technical Services

Preservation and New Construction Classifications

New Construction: is defined as the production of new dwelling units in unoccupied buildings of any previous use type, and new buildings. This classification may include Gut Rehabilitation and New Construction.

Preservation: is defined as the rehabilitation of existing, occupied multifamily rental dwelling units. This classification may include construction types such as Minor, Moderate and Substantial Rehabilitations. Each project will be analyzed based on all the criteria listed in the QAP. Scope of rehabilitation along with the cost of work on a per square foot basis, as demonstrated by a capital needs assessment will be analyzed and confirmed by a site visit by CHFA Tech and UW staff as part of the review process.

QAP Points Overview – Technical Services

Cumulative Rating & Ranking Points for Technical Services related points (Categories Financial Efficiency & Local Impact)

	Categories	Points
2(a)	Cost Effectiveness, Hard Cost (CHFA Cost Analysis Deviation +/- 0% to < 5% or 5% to 10%)	1 or 2
2(e)	≥90% Plans & Specifications	1
2(f)	Sustainable Design Points : Benchmarking with EPA's Energy Star Portfolio Manager is a prerequisite	
	-Energy Conservation	2, 3 or 4
	- Green Building	2 or 3
	-Renewables, Electrification and Resiliency Additional Additive Point	1 or 2 1
	-Operations and Resiliency	1 or 2
	- Sustainable Development with Digital Literacy and Connectivity	1
	Total Possible 2(f) Sustainable Design Points	13
3(e)	3(e) Historic Place, Adaptive re-use, or Brownfield Development: Provide evidence of (i) Renovation of a designated historic building(s), provided eligibility requires evidence of such designation, or (ii) Renovation and adaptive re-use of vacant or abandoned non-residential structure(s), which structures do not have to be historic, or (iii) Remediation of brownfield site(s), provided such site(s) is included on a federal or state list of brownfield sites and/or has been awarded brownfield "clean-up" funds by a federal or state agency.	3
Total Possible Technical Services Related Points (Categories Financial Efficiency & Local Impact)		19

QAP Points Overview – Technical Services

Sustainability Design Measures: New Construction

Energy Conservation

Prerequisites: ⬭ DOE Zero Energy Ready Home Certification ⬭ Balanced ventilation

Criteria	Points
Tier 1 Average HERS Index ≤50; OR Average % below ENERGY STAR Target Index ≥15%	2
Tier 2 Average HERS Index ≤46; OR Average % below ENERGY STAR Target Index ≥25%	3
Tier 3 Average HERS Index ≤42; OR Average % below ENERGY STAR Target Index ≥35%; OR Passive House; OR International Living Future Institute (ILFI) Zero Energy Ready	4

Notes:

- All HERS scores are excluding renewables
- For the purposes of meeting ZERH prerequisite and tier evaluation, projects receiving Historic Tax Credits and subject to SHPO/NPS restrictions may use projected HERS ratings in which the affected envelope assemblies are modeled according to CHFA Design Standards.

QAP Points Overview – Technical Services

Sustainability Design Measures: New Construction

Green Building

Projects shall select the certification path appropriate to the building type and level of renovation.

Criteria	Points
Tier 1 Enterprise Green Communities 2020 (EGC 2020); OR National Green Building Standard (NGBS) Gold; OR Leadership in Energy and Environmental Design (LEED) Gold	2
Tier 2 National Green Building Standard (NGBS) Emerald; OR Leadership in Energy and Environmental Design (LEED) Platinum; OR Living Building Challenge (LBC) Core Ready	3

QAP Points Overview – Technical Services

Sustainability Design Measures: New Construction

Renewables, Electrification and Resiliency

Criteria	Points
Tier 1 PV system to offset ≥75% of the annual energy demand for site and interior common area lighting.	1
Tier 2 PV system to offset ≥90% of the annual energy demand for site and interior common area lighting; AND All-Electric Buildings (excludes backup generator); AND Backup Power to provide resiliency to Critical Systems, Emergency Lighting, and Access to Potable Water	2
Additional Additive Point All-Electric Buildings; AND Battery storage systems or fuel cell to serve as backup power to provide resiliency Critical Systems, Emergency Lighting, and Access to Potable Water	1

QAP Points Overview – Technical Services

Sustainability Design Measures: New Construction

Operations and Resiliency

Criteria	Points
Tier 1 Owner Paid Utilities (to cover usage for- heating, cooling & hot water at a minimum); AND Commissioning	1
Tier 2 Owner Paid Utilities (to cover usage for- heating, cooling & hot water at a minimum); AND Commissioning; AND Backup power to resiliency to Critical Systems, Emergency Lighting, and Access to Potable Water	2

Sustainable development with Digital Literacy and Connectivity

Criteria	Points
High-speed Broadband access to units	1

QAP Points Overview – Technical Services

Sustainability Design Measures: Preservation

LIHTC applications in the Preservation Classification: (i) shall propose a scope of work based on recommendations from an energy consultant for the highest energy efficiency and sustainability design measures appropriate, and (ii) to the extent appropriate and practical for the Proposed Development.

- **Benchmarking – EPA's Energy Star Portfolio Manager**
- **Energy Conservation**
  - **Average HERS Index ≤70; OR**
  - **≥30% reduction in pre-rehab energy use**
- **Green Building**
  - **Enterprise Green Communities 2020 (EGC 2020); OR**
  - **National Green Building Standard (NGBS); OR**
  - **Leadership in Energy and Environmental Design (LEED)**
- **PV system to offset annual energy demand for site interior common area lighting (onsite or offsite renewables) - Complete feasibility study and analysis of return on investment in consultation with CT Green Bank**
- **Backup power to provide resiliency to Critical Systems, Emergency Lighting, and Access to Potable Water**
- **Commissioning**
- **High-speed Broadband access to units**

Extraordinary Costs

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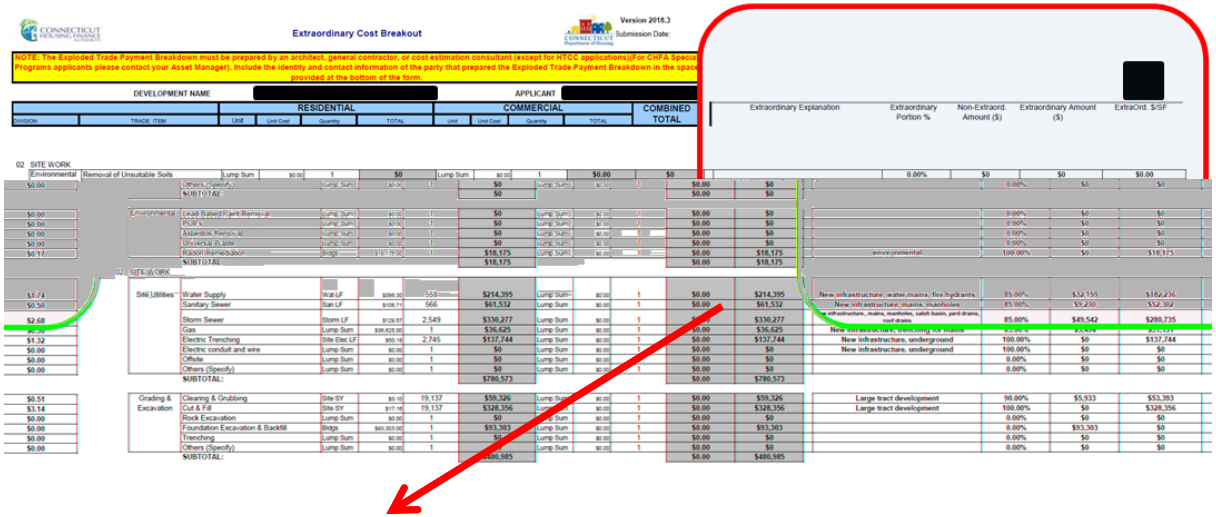
Extraordinary costs commonly considered by CHFA upon receiving detailed back-up information include:

- **Environmental site clean-up**
- **Environmental building remediation**
- **Sitework exceeding 20% of the total construction cost**
- **Demolition**
- **Masonry**
- **Metals (non-structural/decorative)**
- **Siding upgrades**
- **Special Construction**
- **Elevators**
- **CT Prevailing Wages/Davis Bacon Wages**
- **NPS/SHPO requirements**
- **Others as may be identified and considered reasonable and acceptable to CHFA**

Extraordinary Cost- Example

Provide clear breakdown of extraordinary costs above and beyond baseline costs and an evidence to support a rationale for the consideration as extraordinary cost. CHFA will only recognize the portion of the extraordinary costs that it considers reasonable.



Extraordinary Explanation	Extraordinary Portion %	Non-Extraord. Amount ($)	Extraordinary Amount ($)	ExtraOrd. $/SF
	0.00%	$0	$0	$0.00
Extraordinary subsurface conditions	100.00%	$0	$416,130	$3.88
Extraordinary subsurface conditions	100.00%	$0	$81,697	$0.78
premium over vinyl siding	50.00%	$160,877	$160,877	$1.64
premium over wood construction	87.00%	$33,743	$88,610	$0.85

Helpful Hints – Technical Services

- Refer to Consolidated Application for threshold requirements, required application information, and time-sensitive documents like CNA, SHPO & Phase 1 ESA
- Scope of work described in the narrative should match information on the document set and construction costs
- Provide complete project data on the document set including Number of Buildings, Building Gross Area, Total Number & Types of Units, Unit Net Area, Total Living Unit Area, Total Common Area & Total Commercial Area. Data should match Conn. App.
- Exploded Trade Payment Breakdown (ETPB) and Project Cost Summary (PCS)- Provide Units (LF, SF, Each, etc., as applicable), Unit Cost, and associated Quantities. Specify costs under allowances and “others”. This must be supported by information provided on the document set

Helpful Hints – Technical Services

- General Requirements 6% max, OH 2% max & Profit-GMP Fees 6% max
- Construction contingency - for unforeseen conditions only, not for errors and omissions in the document set

  -New Construction: 5% - 8%

  -Rehab Projects with SHPO and /or Environmental: 10% or more at CHFA discretion
- Include environmental abatement costs noted in reports on the appropriate Environmental line item in PCS and ETPB
- Include Prevailing Wages or Federal Davis Bacon as applicable and provide supporting rationale
- All sustainable design measures should be appropriately documented in the drawings/specs and related construction costs noted in PCS and ETPB

Helpful Hints – Technical Services

- Refer to CHFA Environmental Guideline for testing requirements for hazardous materials. Provide cost estimates for remediation
- The Phase I ESA must have been completed within one (1) year prior to the application deadline. If Phase I ESA recommends additional testing, this testing should be done, additional report(s) included in application submission along with remediation costs
- Radon testing is needed for existing buildings; for gut rehabs and new construction, a radon mitigation system should be included in the document set and costs carried in ETPB/PCS
- Refer to current CHFA guidelines on CHFA website. These include updates related to 2022 QAP

SUSTAINABLE DESIGN & CONSTRUCTION QA/QC

CHARLES EMERSON, CHFA

CONNECTICUT HOUSING FINANCE AUTHORITY

Sustainability Points & QA/QC Reminders

- See the new CHFA Guidelines: Energy Conservation & Sustainability for current pre-construction, construction- and post construction-phase QA/QC requirements
- Soft costs for construction phase inspections, testing and verification and post-construction certification, by Professional Engineer and/or certified rater/qualified energy consultants, must be clearly identified and included in the development budget

Sustainability Points & QA/QC Reminders

- Applications seeking points in the Energy Conservation and Green Building categories must provide a completed ConApp Exhibit 4.8.e, a detailed report by a Professional Engineer and/or certified rater/qualified energy consultant verifying compliance with all required Green building standards criteria, as well as all modeling reports, checklists/scoring and all supplemental documents required for any pre-construction project registration and/or design review submission

- Applications seeking points in the Renewals, Electrification and Resiliency categories for Photovoltaic (PV) Systems must provide engineer letters/reports confirming the annual energy demand for site and common area lighting, and qualifying performance of the proposed system

Sustainability Points & QA/QC Reminders

- Points for Energy Conservation and Green Building categories will be based on the percentage of qualifying units provided in the application:
  - 2 point criteria: If no less than 50% of the units qualify, 1 point; if no less than 100%, 2 points
  - 3 point criteria: If no less than 33% of the units qualify, 1 point; if no less than 66%, 2 points; and if no less than 100%, 3 points
  - 4 point criteria: If no less than 25% of the units qualify, 1 point; if no less than 50%, 2 points; if no less than 75%, 3 points; and if no less than 100%, 4 points

Sustainability Points & QA/QC Reminders

Post Application

- Applications awarded points under the Energy Conservation and Green Building categories will be required to provide proof of project registration and payment of required fees for the specific certification program(s) for which the application was awarded points, and demonstrate completion of any initial reviews and/or pre-certification requirements prior to Initial Close/issuance of a 42m Letter

- Applications awarded points under the Energy Conservation and Green Building categories will be required to provide HERS certificates and proof of relevant certification(s) at Cost Certification

CONNECTICUT HOUSING FINANCE AUTHORITY

DOH FUNDING PARAMETERS

MIGUEL RIVERA, DOH

DOH Funding Parameters

- DOH plans to make commitments of its subordinate financing to support the 2022 9% LIHTC round
- Awards are limited to $100,000 per qualified unit up to a maximum of $4 million per project
- Awards are limited to one per developer/sponsor/owner.
- Subordinate financing is subject to the availability of funds and Bond Commission allocation and authorization

DOH Funding Parameters

- **Non-profit sponsors of projects that include units to primarily serve persons with disabilities, veterans, or homeless families or individuals should contact DOH to discuss the subordinate financing limit for their projects.**
  - **Note that senior or elderly population is not listed here as an exception**

DOH Funding Parameters

- Applicant must submit a plan compliant with Procurement requirements
- If any portion of the site is within a flood plain defined as FEMA Flood Zone Designation other than B, C or X:
  - Applicant must provide approval by the Department of Energy and Environmental Protection.
  - Levy protection, if applicable, must be active and maintained

DOH Funding Parameters

- Debt and Deferred Developer Fees must be maximized; these amounts may be adjusted during underwriting to reduce the use of scarce resources
- Awards will not be made to development entities that have two or more outstanding commitments from DOH that have not closed as of March 31, 2022
- CEPA submissions must be compliant with the new 2021 standards

DOH Funding Process

- Applications must be submitted with applications for 9% LIHTCs by 4:00 PM on January 12, 2022
- Applications for 9% LIHTCs and DOH funding will be reviewed concurrently
- There will not be a deficiency period
- If necessary, clarification of information will be requested simultaneously with clarifications for 9% LIHTCs

SUPPORTIVE HOUSING GUIDANCE

STEVE DILELLA, DOH

INTERAGENCY COUNCIL SUPPORTIVE HOUSING AND HOMELESSNESS

Leasing Units Set-Aside for Homeless / Special Populations

Engage Coordinated Access Networks

- Vacancies reported to CAN Managers at DOH by email from property manager
- CAN refers household that meets eligibility requirements
- Service provider assists client through lease up

Statewide CAN Managers

Beau Anderson MPA
beau.anderson@ct.gov
(860) 416-0552

Leigh Shields-Church LCSW
leigh.shields-church@ct.gov
(860) 371-9579

Kara Zichichi LCSW
kara.zichichi@ct.gov
(860) 371-4282

CAN REFERRAL PROCESS

Email CAN Managers information:

- **Name and address of development**
- **Name and contact information for three parties: Owner/Developer, Property Manager, Service Provider**
- **Target Population – Example, chronically homeless adults and families**

CAN REFERRAL PROCESS

Email CAN Managers information (cont.):

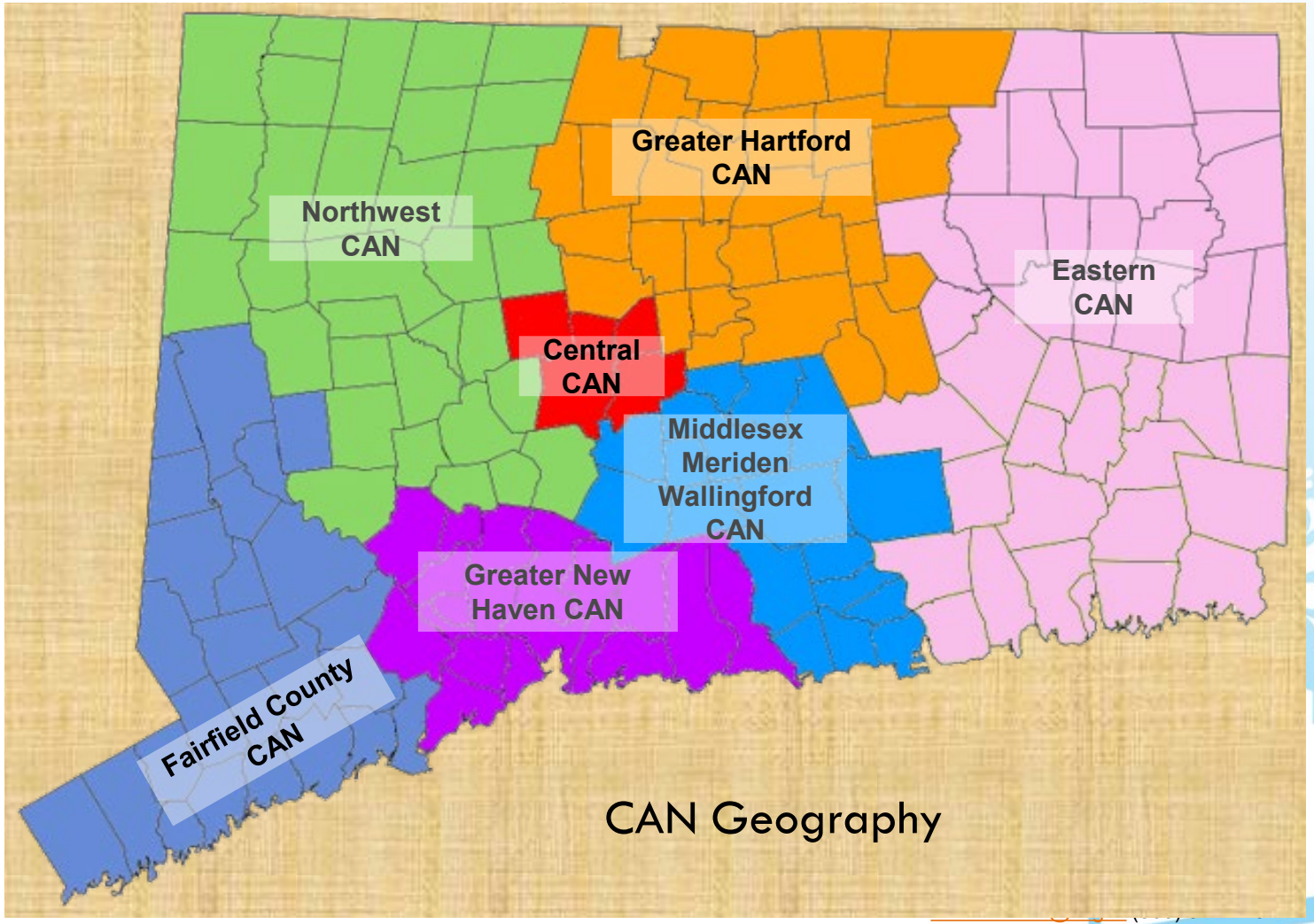
- Target Population – Example, chronically homeless adults and families; developmentally disabled individuals
- Available supportive units (number and sizes) – Example, three-1BR and four-2BR units of Supportive Housing

CAN REFERRAL PROCESS

Email CAN Managers information (cont.):

- **Any specific tenant eligibility requirements – Example, young adult under 24 years of age**
- **Any specific leasing exclusions – Example, certain types of criminal history**
- **Anticipated date of unit availability**

CONNECTICUT HOUSING FINANCE AUTHORITY



CONNECTICUT HOUSING FINANCE AUTHORITY

Central CAN

Berlin, Bristol, New Britain, Plainville, Southington

Fairfield County CAN

Bethel, Bridgeport, Bridgewater, Brookfield, Cos Cob, Danbury, Darien, Easton, Fairfield, Greenwich, Monroe, New Canaan, New Fairfield, New Milford, Newtown, Norwalk, Redding, Ridgefield, Roxbury, Sherman, Stamford, Stratford, Trumbull, Weston, Westport, Wilton

Eastern CAN

Ashford, Bozrah, Brooklyn, Canterbury, Chaplin, Colchester, Columbia, Coventry, Danielson, Eastford, East Lyme, Franklin, Griswold, Groton, Hampton, Killingly, Lebanon, Ledyard, Lisbon, Lyme, Mansfield, Montville, Mystic, New London, North Stonington, Norwich, Old Lyme, Plainfield, Pomfret, Preston, Putnam, Salem, Scotland, Sprague, Sterling, Stonington, Thompson, Union, Voluntown, Waterford, Willimantic, Willington, Windham, Woodstock

Greater Hartford CAN

Andover, Avon, Bloomfield, Bolton, Canton, East Granby, East Hartford, East Windsor, Ellington, Enfield, Farmington, Glastonbury, Granby, Hartford, Hebron, Manchester, Marlborough, Newington, Rockville, Rocky Hill, Simsbury, Somers, South Windsor, Stafford, Suffield, Tolland, Vernon, West Hartford, Wethersfield, Windsor, Windsor Locks

Greater New Haven CAN

Ansonia, Beacon Falls, Bethany, Branford, Derby, East Haven, Guilford, Hamden, Madison, Milford, New Haven, North Branford, North Haven, Orange, Oxford, Seymour, Shelton, West Haven, Woodbridge

Middlesex Meriden Wallingford CAN

Chester, Clinton, Cromwell, Deep River, Durham, East Haddam, East Hampton, Essex, Haddam, Killingworth, Meriden, Middlefield, Middletown, Old Saybrook, Portland, Wallingford, Westbrook

Northwest CAN

Barkhamsted, Bethlehem, Burlington, Canaan, Cheshire, Colebrook, Cornwall, Goshen, Hartland, Harwinton, Kent, Litchfield, Middlebury, Morris, Naugatuck, New Hartford, Norfolk, North Canaan, Plymouth, Prospect, Salisbury, Sharon, Southbury, Thomaston, Torrington, Warren, Washington, Waterbury, Watertown, Winchester, Winsted, Wolcott, Woodbury

Guide to Commonly Used Acronyms

BNL – By Name List. A registry of people experiencing homelessness, by name.
CAN – Coordinated Access Network(s). The organizing geographies used for coordinated entry system.
CoC – Continuum of Care. The organizing geographies used for service delivery of federal resources.
DMHAS – Department of Mental Health and Addiction Services. State of Connecticut.
DOH – Department of Housing. State of Connecticut.
ES – Emergency Shelter.
HMIS – Homeless Management Information System. This is our centralized database of client data.
HUD – Housing of Urban Development. Federal government.
PSH – Permanent Supportive Housing. A long-term, low-barrier housing assistance resource that includes support services.
RRH – Rapid Re-Housing. A time-limited assistance resource to help people quickly exit homelessness.
VI-SPDAT – Vulnerability Index-Service Prioritization Decision Assistance Tool. The common assessment tool used to identify level of service need and aid in prioritization for housing resource.

SECTION 811 PRA (CT811)

TAWNY PHO

DEPARTMENT OF HOUSING

CT811 Basics

- Federal, project-based rental assistance program for persons with disabilities administered by DOH in partnership with CHFA, DSS, DMHAS, and OPM.
- 811 PRA provides rental subsidies for gross rents up to the applicable HUD FMR.
- In August 2020, DOH was awarded just under $7 million. DOH is currently accepting applications a rolling basis.
- In search of New Construction, Rehab or Existing Projects with adequate turnover.

CT811 Project Requirements

- Limited to no more than 25% of the project.
- Rental Assistance Contract between DOH and Owner is for 20 years, with a recorded Use Agreement for a minimum of 30 years. Funding is available in 5-year cycles, subject to Congressional appropriations.
- Davis Bacon labor standards apply to projects with 12 or more PRA units.
- Uniform Physical Condition Standards (UPCS) inspections required at least every 3 years.
- Environmental reviews required for new and existing properties (completed projects that are HUD-assisted/HUD-insured are exempt).

Eligible Multifamily Properties

- Any new or existing property with at least five units owned by a housing authority, nonprofit or private entity.
- Development costs can be paid with any public or private resources except for Section 202 or Section 811 Capital Advances.

Not Eligible: Units receiving long-term operating subsidies in the last 6 months (such as Section 8 project-based assistance); senior-restricted units; units that already have restricted use for persons disabilities.

Preferred Features: Near public transportation and community services, efficiency & 1BR units, accessible/adaptable units, management agencies with federal project-based housing & HUD Systems experience.

Eligible CT811 Tenants

- Eligible households are Extremely Low-Income (at or below 30% of AMI) individuals and families with at least one individual who has a qualifying disability and is between the ages of 18 and 62.

- Applicants from any one of three target populations are referred directly to the project in coordination with DOH and its Interagency Partners.
  1. Persons who are experiencing homelessness or chronic homelessness through the State's Coordinated Access Networks
  2. Persons eligible for the State's Money Follows the Person (MFP) Demonstration and are currently institutionalized
  3. Persons eligible for services under an approved 1915c waiver for persons with Autism Spectrum Disorder

- 811 PRA tenants are connected to support services. This can include housing coordination, security deposit assistance, and community-based long-term care services.

CT811 & the QAP

Rental Affordability

- **Supportive Housing Units**: Participation CT811 shall be deemed equivalent to the inclusion of Traditional Supportive Housing.

- **Households at or below 30% Aggregate Median Income:** CT811 units are restricted to Households at or below 30% AMI.

CT811 &
the Supportive Housing Guideline

- Participation in CT811 under the guideline requires a minimum commitment of 10% and a maximum commitment of 25% of qualified units at the property.

- Service funding/Service plan requirements are not applicable with participation in CT811.

- CT811 projects are subject to HUD's Management and Occupancy Reviews.

How to Apply for CT811

- To apply, submit a CT811 Project Application to DOH. If selected for participation, the project owner enters into an Agreement to Enter into a Rental Assistance Contract (ARAC).
- LIHTC applicants selected for participation in CT811 must include the executed ARAC or an equivalent Letter of Intent from DOH with their submissions to CHFA.
- The ARAC specifies that upon the acceptable completion of the project, the Owner and DOH will enter into a Section 811 Rental Assistance Contract for the purpose of making assistance payments to enable eligible households to occupy units in the project.

CT811 Point of Contact:
Tawny Pho
State of Connecticut Department of Housing
(860) 270-8091
Tawny.Pho@ct.gov

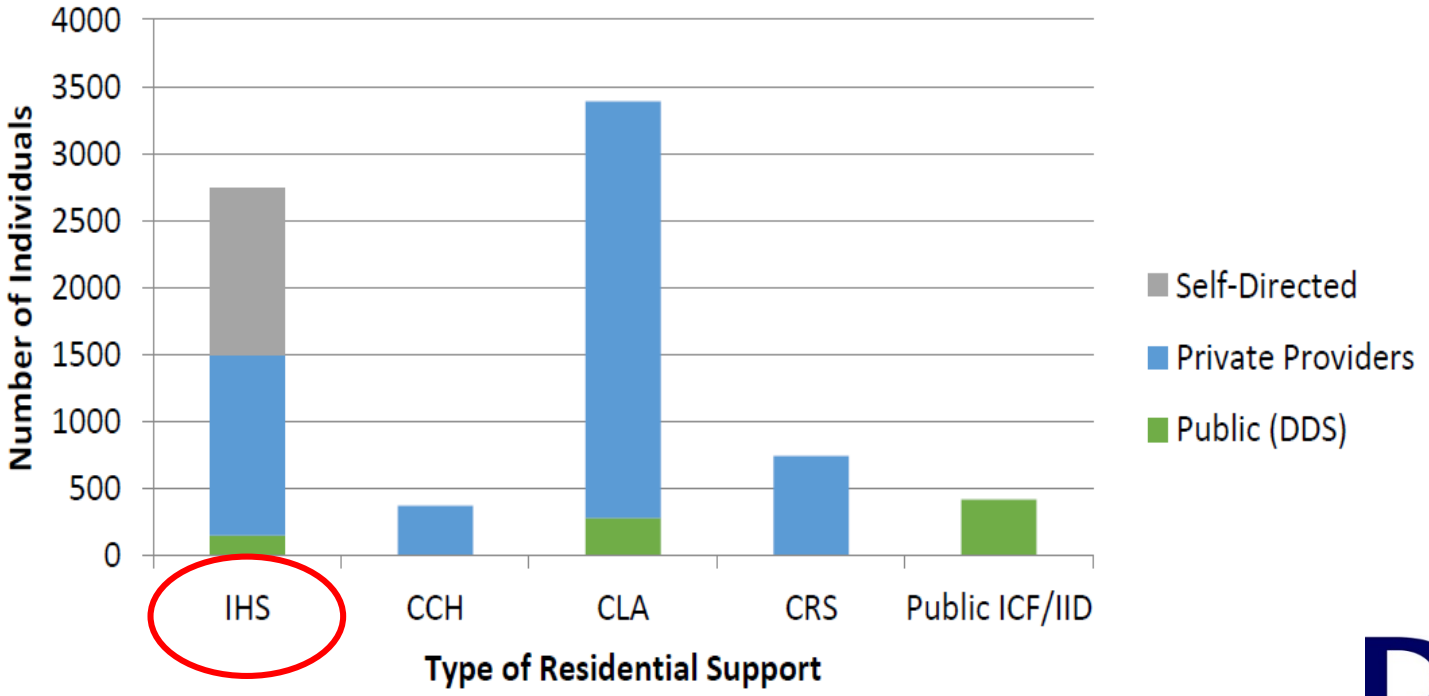
SUPPORTIVE HOUSING FOR DDS CLIENTS

JOSHUA SCALORA

DEPARTMENT OF DEVELOPMENTAL SERVICES

THE CONNECTICUT DEPARTMENT OF DEVELOPMENTAL SERVICES SUPPORTIVE HOUSING

MOVING TOWARDS COMMUNITY-BASED SUPPORTS

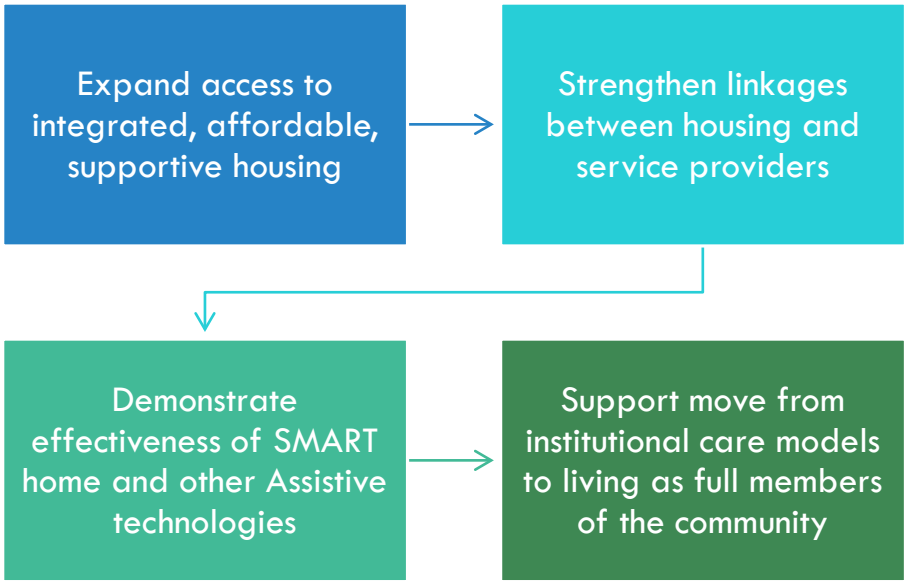


DDS HOUSING SUPPORTS

- Housing supports for individuals eligible for DDS services may be funded as part of a comprehensive residential service or separately

- DDS participates in multiple interagency groups and efforts to maximize housing opportunities for individuals with intellectual disability and others
  - Interagency Committee on Supportive Housing
  - CHESS Medicaid Housing Supports planning team
  - Governor's Task Force on Housing and Supports for Vulnerable Populations (Governor Malloy)

GOALS OF DDS SUPPORTIVE HOUSING PROJECTS



EXPANDING ON OUR GOALS

Reduce	Reduce the number of people living in congregate settings and increase the number of people living in integrated and affordable supportive housing settings
Implement	Implement assistive technology strategies to improve outcomes, increase independence, maintain health and safety and decrease the over-reliance on paid staff
Increase	Increase number of individuals supported while decreasing per-person support costs

DDS

WHAT DO PEOPLE SUPPORTED BY DDS NEED AND WANT?

- Safe & affordable supportive housing
- Easy access to transportation
- Community and Work opportunities
- Shared/Mixed-use community space
- Inclusion and participation
- Accessible or Accessible Ready

DDS

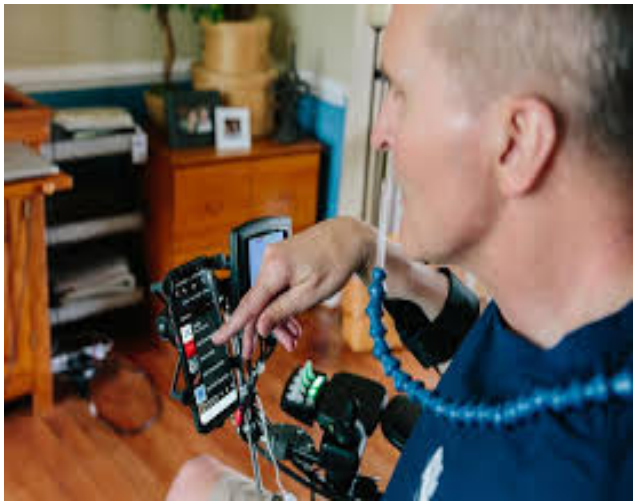
DDS PROVIDER REQUIREMENTS

- Qualified to provide In Home Support Services
- Enrolled as Medicaid Performing Provider
- In Good Standing with Active Certification
- Innovative approaches to community-based supports
- Willingness to partner with housing developer

DDS

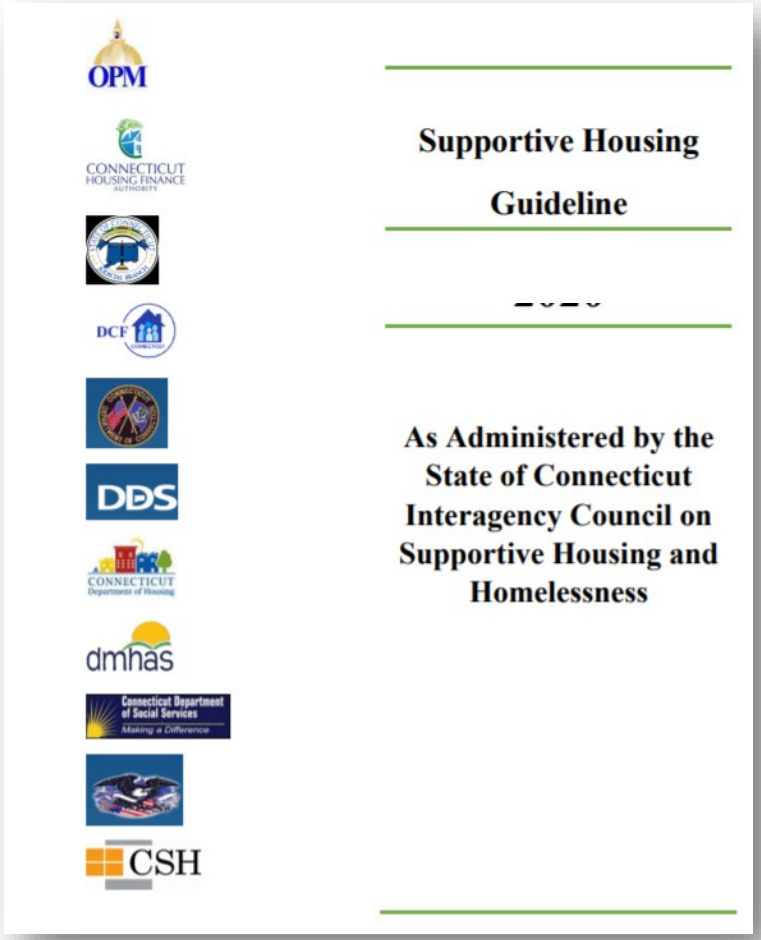
KEY ELEMENTS OF SUCCESSFUL DEVELOPMENTS

- ≤25% of total units in a larger development
- Person-Centered living environment
- Economy of Scale in service delivery
- On-site staffing available
- Ability to Age in Place
- Continuum of supports as needs change
- Strong provider/developer relationship



FUNDING CONSIDERATIONS

- Development Funding
  - Appropriation (IDASH)
  - Low-Income Housing Tax Credit (LIHTC)
- Rental Assistance
  - State Agency or Housing Agency Funded
  - Project Based or Resident Based
- Service Funding
  - New Waiver service funding
  - Existing Recycled or Portable funds



RECENT EFFORTS

2017-2019 Innovation

- IDASH Intellectual Disability and Autism Spectrum Housing
  - $20M Capital Development
  - 3 Developments

2019-2021 Sustainability

- Low Income Housing Tax Credit (LIHTC)
  - Existing DOH/CHFA Capital Development Process
  - 3 Developments

DDS

Joshua Scalora
CT Department of Developmental Services
860-418-6119
joshua.scalora@ct.gov

SHPO REGULATORY COMPLIANCE

TODD LEVINE

MARENA WISNIEWSKI

STATE HISTORIC PRESERVATION OFFICE

Regulatory Compliance – State Historic Preservation Office

- **Our Priorities:**
  - –Preserve Historic Fabric
  - –Encourage Efficient Review Process

Regulatory Compliance – State Historic Preservation Office

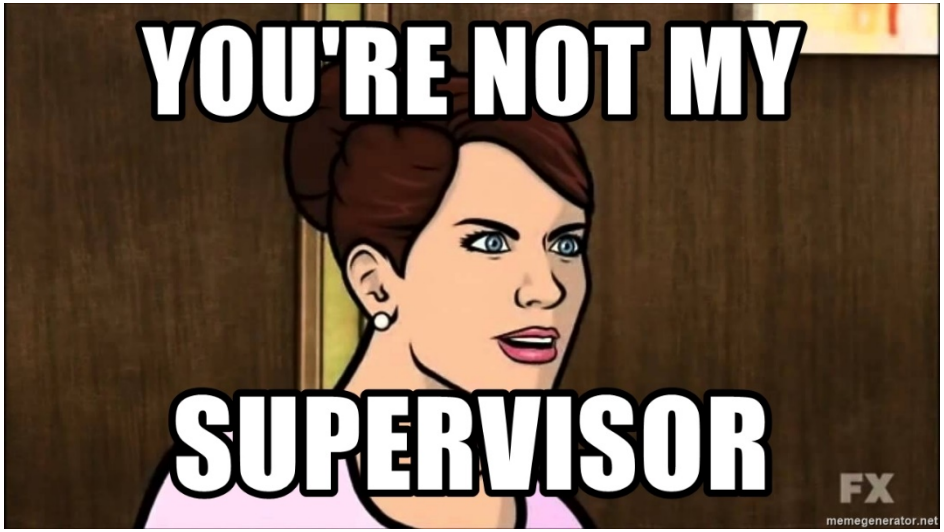
So….what is historic fabric?

Regulatory Compliance – State Historic Preservation Office

So….what is historic fabric?

Regulatory Compliance – State Historic Preservation Office

Why is Review Required?



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Why is Review Required?

- Section 106, National Historic Preservation Act of 1966
- Connecticut Environmental Policy Act

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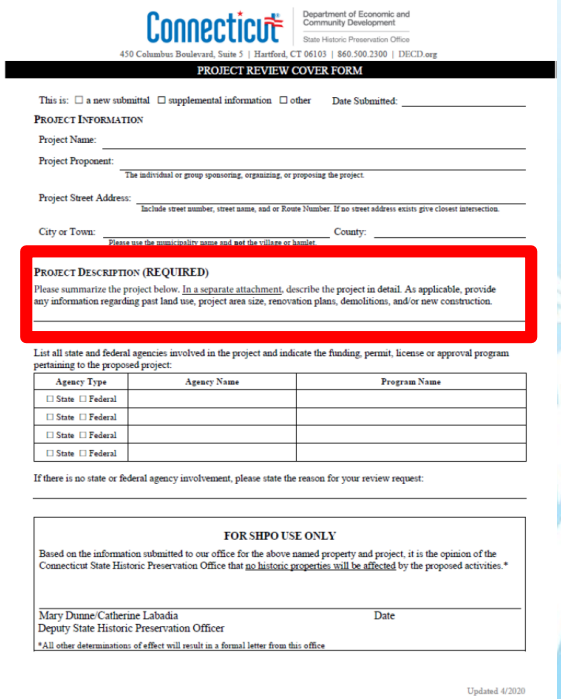
How do I submit a Review?

- Project Notification Form
  - –No “See Attached!”
- Attachments
- Plan Ahead



Connecticut
Department of Economic and Community Development
State Historic Preservation Office
450 Columbus Boulevard, Suite 5 | Hartford, CT 06103 | 860.500.2300 | DECD.org

PROJECT REVIEW COVER FORM

This is: ☐ a new submittal ☐ supplemental information ☐ other Date Submitted: _____

PROJECT INFORMATION

Project Name: _____

Project Proponent: _____
The individual or group sponsoring, organizing, or proposing the project.

Project Street Address: _____
Include street number, street name, and or Route Number. If no street address exists give closest intersection.

City or Town: _____ County: _____
Please use the municipality name and not the village or hamlet.

PROJECT DESCRIPTION (REQUIRED)

Please summarize the project below. In a separate attachment, describe the project in detail. As applicable, provide any information regarding past land use, project area size, renovation plans, demolitions, and/or new construction.

List all state and federal agencies involved in the project and indicate the funding, permit, license or approval program pertaining to the proposed project:

Agency Type	Agency Name	Program Name
☐ State ☐ Federal		
☐ State ☐ Federal		
☐ State ☐ Federal		
☐ State ☐ Federal		

If there is no state or federal agency involvement, please state the reason for your review request:

_____

FOR SHPO USE ONLY

Based on the information submitted to our office for the above named property and project, it is the opinion of the Connecticut State Historic Preservation Office that no historic properties will be affected by the proposed activities.*

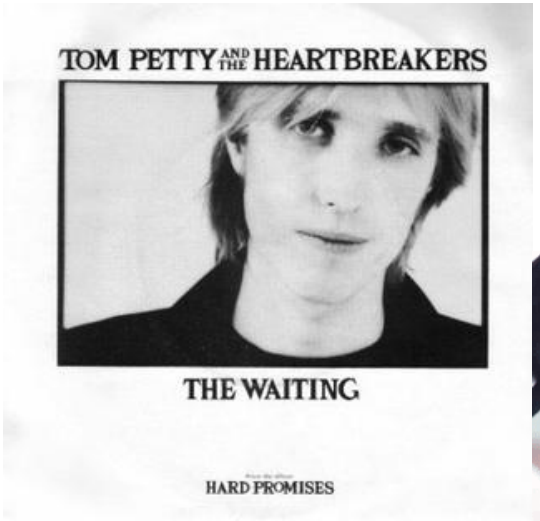
_____
Mary Dunne/Catherine Labadia Date
Deputy State Historic Preservation Officer

*All other determinations of effect will result in a formal letter from this office

Updated 4/2020

Regulatory Compliance –
State Historic Preservation Office

When do I hear back from you?



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When do I hear back from you?

- Outcomes
  - –No Historic Properties Affected
  - –No Adverse Effects
  - –Conditional No Adverse Effects
  - –Adverse Effects

Regulatory Compliance –
State Historic Preservation Office

What if the determination is an adverse effect?

Regulatory Compliance – State Historic Preservation Office

What if the determination is an adverse effect?

- –Avoidance
- –Minimization
- –Mitigation

Regulatory Compliance – State Historic Preservation Office

- How to Avoid an Adverse Effect
  - –Secretary of the Interior's *Standards for the Treatment of Historic Properties*

Regulatory Compliance – State Historic Preservation Office

- How to Avoid an Adverse Effect
  - –Secretary of the Interior's *Standards for the Treatment of Historic Properties*

Regulatory Compliance – State Historic Preservation Office

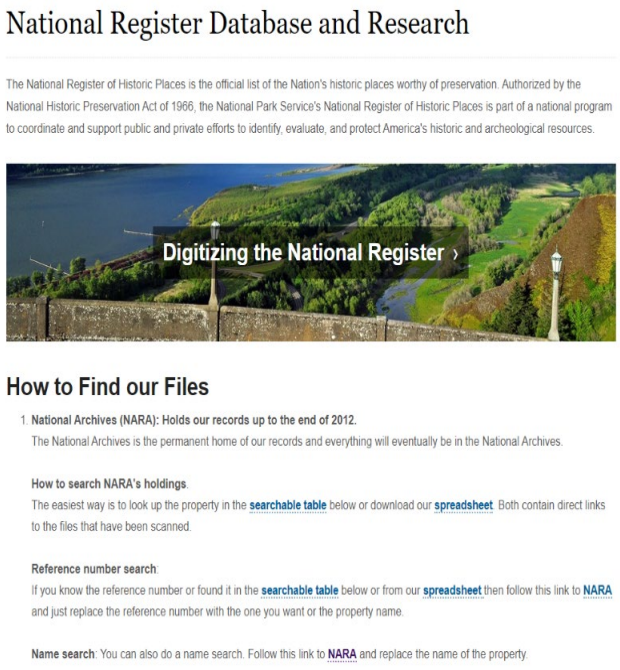
But wait! There's More….

- How to Avoid an Adverse Effect
  - –Secretary of the Interior's *Standards for the Treatment of Historic Properties*
  - –*Talk to Us First!*

Regulatory Compliance – State Historic Preservation Office

Helpful Resources to Consider Before Submitting a Project

- NPS Database
- SHPO Database
- SOI Standards
- Tax Credit Program



National Register Database and Research

The National Register of Historic Places is the official list of the Nation's historic places worthy of preservation. Authorized by the National Historic Preservation Act of 1966, the National Park Service's National Register of Historic Places is part of a national program to coordinate and support public and private efforts to identify, evaluate, and protect America's historic and archeological resources.

How to Find our Files

1. **National Archives (NARA): Holds our records up to the end of 2012.**
   The National Archives is the permanent home of our records and everything will eventually be in the National Archives.

   How to search NARA's holdings.
   The easiest way is to look up the property in the **searchable table** below or download our **spreadsheet**. Both contain direct links to the files that have been scanned.

   Reference number search:
   If you know the reference number or found it in the **searchable table** below or from our **spreadsheet** then follow this link to **NARA** and just replace the reference number with the one you want or the property name.

   Name search: You can also do a name search. Follow this link to **NARA** and replace the name of the property.

Regulatory Compliance – State Historic Preservation Office

Checklist

- ❑ Reach out to us early
- ❑ Check to see if you already have a historic resource
- ❑ Consider if you will be applying for Historic Tax Credits
- ❑ Fill out the Project Notification Form
- ❑ Compile ancillary documents
- ❑ Mail in a hard copy
- ❑ Supply additional information if requested

Regulatory Compliance – State Historic Preservation Office

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Todd Marena

Regulatory Compliance – State Historic Preservation Office

Catherine Labadia	Todd Levine	Marena Wisniewski
Archaeologist, Environmental Reviewer, W3R Coordinator	Architectural Historian, Environmental Reviewer, Connecticut Freedom Trail Coordinator, CEPA Liaison	Preservationist, State Register Coordinator, Environmental Reviewer
450 Columbus Boulevard Hartford DECD/SHPO 860-500-2329	450 Columbus Boulevard, Hartford DECD/SHPO 860-500-2337	450 Columbus Boulevard, Hartford DECD/SHPO 860-500-2357
catherine.labadia@ct.gov	todd.levine@ct.gov	marena.wisniewski@ct.gov

CONNECTICUT HOUSING FINANCE AUTHORITY

SHAREPOINT AND CONSOLIDATED APPLICATION

CHRIS POLEK, CHFA

CONNECTICUT HOUSING FINANCE AUTHORITY

Features in SharePoint

- Application Checklist/Task list
- Built in Consolidated Application workbook
- Reference Library
  - This section includes templates and fillable forms to be used in conjunction with submission of the application
- Application specific website that can be shared with unlimited users allowing multiple team members to upload files as needed

How to get access to SharePoint

- The Applicant should send an email to applicationrequest@chfa.org providing:
  - Funding Round (e.g. 9% LIHTC, CHAMP, SSHP, etc.)
  - Application Name (Project Name)
  - Company Name (Applicant)
  - Primary Contact Name
  - Primary Contact Email
  - Primary Contact Phone
- Each application request will require a separate email to be sent
- Allow 2-3 business days for website to be created
- Receive email with access to the application specific website
- A Microsoft Account will have to be created for each email address used in SharePoint

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SharePoint – Task List

- Shows list of tasks associated with the application
- Tasks can be assigned to specific team members and be given due dates
- Provides a timeline of activity prior to application submission date
- **Once all items are checked off, the application website will lock and your application will be submitted**

SharePoint – Task List

2. Application Checklist

Use this checklist to keep your team focused on the upcoming tasks related to completing this funding application. New tasks can be created and assigned to individual team me with. The timeline below shows important upcoming dates. Below are tasks to be completed. (For help on how to use this checklist, click here.)

IMPORTANT: To submit this application for review, check-off all items on the task list below. (Once submitted, you will not be able to make further changes to this application.)

Task List

January 2018	May 2018	September 2018	January 2019
Consolidated Application and QAP Overview Session 9/7 - 9/25			

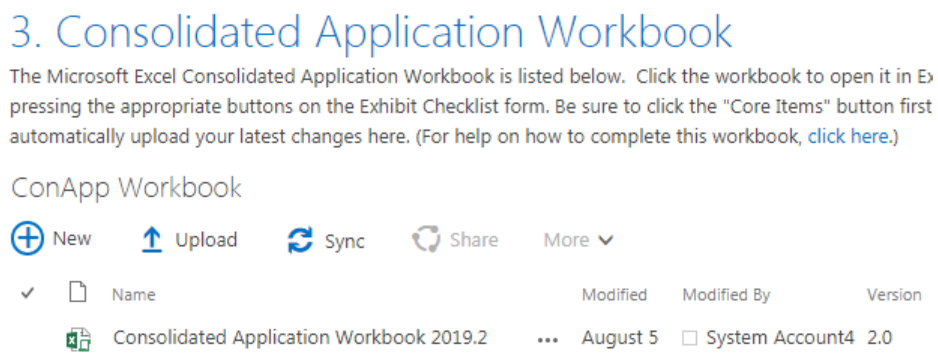
new task or edit this list

	Title	Due Date	Assigned To
☐	Ensure that you meet the technological prerequisites (Section 1. above)		
☐	Consolidated Application and QAP Overview Session	September 25	
☐	(Reccomended) Set up Pre-Application Meeting with CHFA and DOH (if needed)	October 10	
☐	Share this site with your Development Team		
☐	Upload all appropriate documents/exhibits as noted in the Consolidated Application Workbook		
☐	Complete the Consolidated Application Workbook (see below)	November 6	
☐	Ready for Review (Check when ready to submit application)	November 6	

Consolidated Application Workbook

- Built into SharePoint
- Can be edited and saved directly to site allowing team members to work on the same file, most updated version
- Can be downloaded to individual PC's to be edited and uploaded when complete (prior to submission deadline)
- Can be downloaded from CHFA and DOH websites, then uploaded to SharePoint when complete (prior to submission deadline)
  - **The version submitted must be the same as what is available to download from the SharePoint application site (Home page and Reference Library)**

Consolidated Application Workbook



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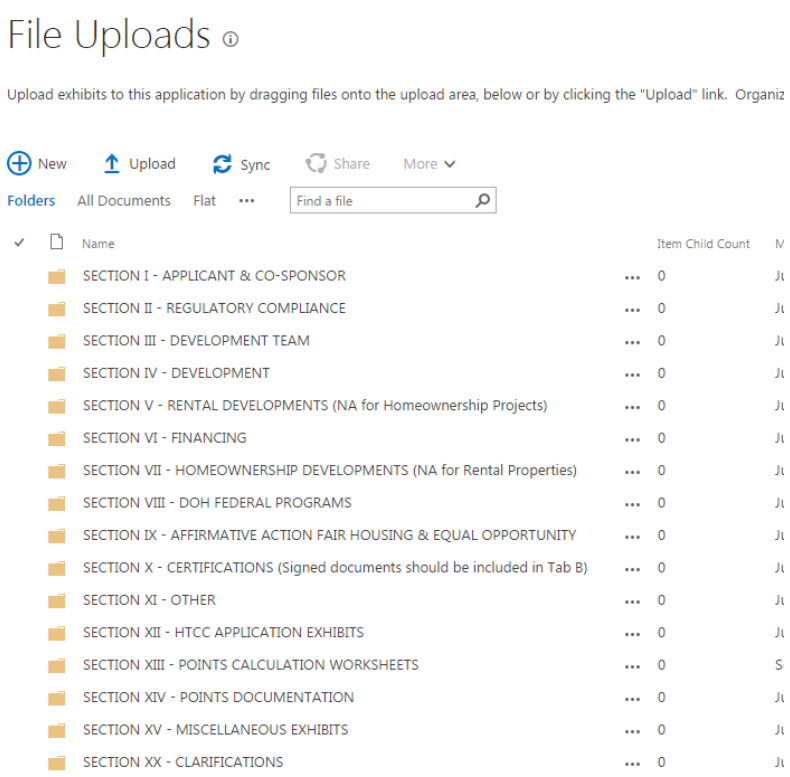
File Uploads

- Section of website specifically for file uploads
- Can upload multiple files at once, and place them into section folders
- “Drag and Drop” available for convenience
- Uploaded items can be removed if done incorrectly, or can be replaced

File Uploads

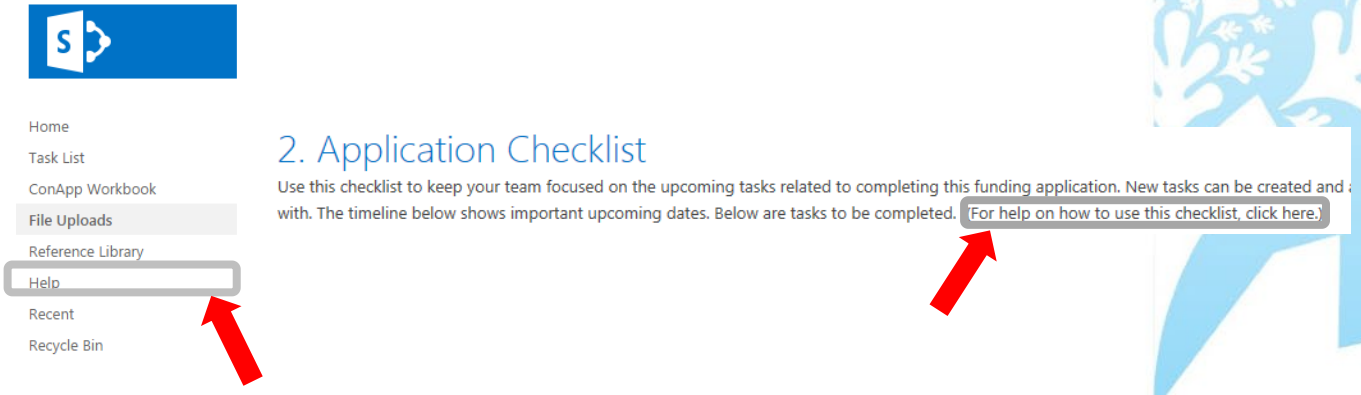


Sharing the Site

- SharePoint allows site sharing, which means once the site is created, and one team member is able to log in, they can then share the site with anyone else
- This allows multiple users to:
  - Assign and complete tasks
  - Update one Consolidated Application workbook
  - Upload files as necessary

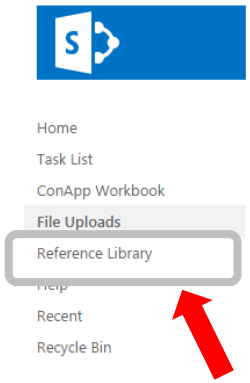
Help Section

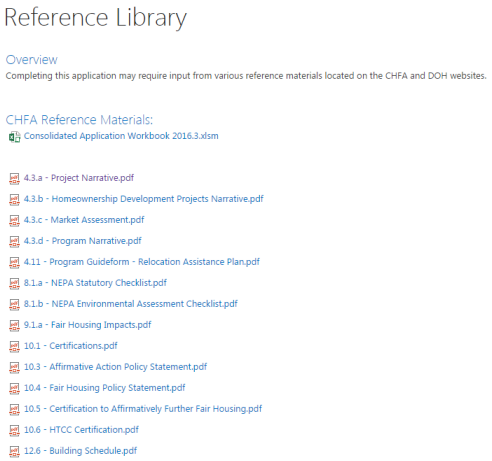
- There is a Help section available to walk users through the steps to use each section of the SharePoint website
- Accessed through the menu in the upper left section of the Home screen, or by clicking help links in each section description



Reference Library

- This section includes a downloadable version of the Consolidated Application, as well as several templates and forms that are to be completed and submitted with each application (as applicable)





Submitting the Application

- It is recommended to upload documents as they are completed to avoid any potential submission errors due to attempts to upload to the site at the cutoff time
- CHFA will not review any uploads to the SharePoint site until after the application submission date/time
- Nothing submitted via email will be considered as part of the application unless requested specifically by CHFA or DOH
- **To submit your application and lock your website, mark all the items in the Task List section as complete.**

Consolidated Application Changes

Changes made to Consolidated Application

- Updates to HTCC related exhibits/requirements
- Updated links related to Technical Services requirements (throughout)
- Application – Row 149 – revised language
- Exhibit 4.1.c – eliminated outdated language
- Exhibit 4.4 – updates based on revised language from SHPO
- Exhibit 4.5.a – misc. language and hyperlink updates
- Exhibit 4.5.b – misc. language and hyperlink updates
- Exhibit 4.8.e – Energy Conservation – revised per new requirements
- Exhibit 4.9.c – elimination of “Energy Items” from extraordinary costs explanation
- Exhibit 6.4 – LIHTC Calc. – revised Credit NPV of AFR amounts
- Exhibit 6.5 – Sources of Funds – adjustment to Scheduled Debt Service calculation
- Exhibit 13.1 - Points Calc. updated per QAP

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QUESTIONS?

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Contact Information

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