

# Ohio Historic Preservation Tax Credit Round 28



The Manse Apartments in Cincinnati was completed in 2021. The project rehabbed the former Manse Hotel into 60 affordable apartments for seniors and families in two historic buildings and one newly constructed building. Historically, the Manse Hotel and Annex was one of the few hotels in Cincinnati to serve African American travelers.

Photo credit: The Model Group



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## Application Process Overview

This guide is provided to assist applicants in understanding the application process and requirements for the Ohio Historic Preservation Tax Credit program. Applying to the program is a multifaceted process that includes both the Ohio Department of Development and State Historic Preservation Office (SHPO).

The competitive Ohio Historic Preservation Tax Credit application is submitted online for review by the Ohio Department of Development. Prior to this submission, applicants must complete an Intent to Apply form and may hold a pre-application meeting with Ohio Department of Development program staff to discuss their project and application.

Applicable Part 1 and 2 forms, documenting the historic designation and proposed rehabilitation of the historic building(s), are submitted in hard copy for review by the SHPO. Prior to submission, applicants must request and hold a required pre-application meeting with SHPO program staff to discuss their project and application.



Following submission of both the historic documentation and application, the SHPO and Ohio Department of Development have cure processes to request additional information during the application review period. Applicants are encouraged to review Section 3 of the program policies for additional detail on the application schedule and procedures.

## Round 28 Timeline

The following dates are important deadlines for Round 28:

- **SHPO Pre-Application Meeting Request Deadline:** January 31, 2022 by 5:00 pm
- **Intent to Apply Submission Deadline:** February 15, 2022 by 5:00 pm
- **Historic Documentation (Part 1 and 2) Deadline:** February 28, 2022 by 5:00 pm
- **Application Deadline:** March 31, 2022 by 5:00 pm
- **Application Review Period:** April 1 to June 1, 2022
- **Award Announcement:** on or before June 30, 2022

## Program Contact

Lisa Brownell  
OHPTC Program Manager  
Ohio Department of Development  
(614) 752-2345

[lisa.brownell@development.ohio.gov](mailto:lisa.brownell@development.ohio.gov)

(note that Development is still working remotely, so email is the most efficient way to contact Lisa. Calls can always be arranged as needed)

## Application Fees

The table below outlines the fee required to submit an Ohio Historic Preservation Tax Credit application. The amount of the application fee is based on the total tax credit requested. Application fees are due in full to the Ohio Department of Development via wire transfer and must be received by 5:00 p.m. on March 31, 2022 (the application submission deadline). Applications will not be scored during Round 28 of the program unless **both** the application and application fee are received by 5:00 p.m. on March 31, 2022. **Fees must be submitted via electronic wire transfer; mailed or hand delivered fees will not be accepted.**

Tax Credit Requested	Application Fee
\$10,000 or less	\$50
\$10,001 - \$25,000	\$100
\$25,001 - \$50,000	\$250
\$50,001 - \$100,000	\$500
\$100,001 - \$250,000	\$750
\$250,001 - \$500,000	\$1,000
\$500,001 - \$1,000,000	\$1,500
\$1,000,001 - \$5,000,000	\$2,000

### Electronic Fee Payment

Fees must now be paid via wire transfer. Email [lisa.brownell@development.ohio.gov](mailto:lisa.brownell@development.ohio.gov) for the wiring details.

## Competitive Scoring

All applications are evaluated using a 100-point objective scoring process. Applicants self-score their application as part of the online submission. Scoring is verified by Ohio Department of Development program staff during the application review period. Prior to submission of the application, program staff can assist applicants in assessing potential competitiveness based on an anticipated self-score.

The competitive scoring includes 13 criteria that fall under two main considerations:

- Regional Distributive Balance (30%)
- Potential Economic Impact (70%)

## Small and Intermediate Project Set-Asides

To ensure that a balance of small, intermediate, and large projects are able to access the program, tax credit allocation is reserved in each round for small and intermediate sized projects. Of the total available allocation in each round, 8% is set-aside for small projects and 25% is set-aside for intermediate projects. Projects qualifying as small or intermediate compete for these set-aside pools before competing against larger project applications for the remaining allocation. The below table outlines the Qualified Rehabilitation Expenditures and maximum tax credit required to qualify for these set-asides.

	Small	Intermediate
Qualified Rehabilitation Expenditures (QREs)	Less than \$1,250,000	\$1 - \$10 million
Maximum Tax Credit	\$250,000	\$2 million

## Intent to Apply

Applicants must have completed and submitted the online Intent to Apply form through the Development website no later than February 15, 2022 to be eligible for Round 28. The Intent to Apply includes basic questions about the project, including rough cost estimates, contact information, and current status of historic designation and ownership or leaseholder interest.

## Online Application

The program application is available at <https://development.ohio.gov/historic>.

An account must be created at the Agency Web Portal Login with a username/email address and password to begin/access applications. This email/password will allow access to the applications at any time before submittal and will also allow you to access applications for reference after they have been submitted. Application viewing is linked via the username/email address, such that all applications created under the same username/email can be accessed by that login. Therefore, Ohio Department of Development strongly encourages applicants to use a building owner's email, rather than a consultant's email, for this login.

After the login access is created, the applicant is directed to the Ohio Department of Development Applications Portal. Click "Ohio Historic Preservation Tax Credit Application" to advance through the portal.

Once the applicant reaches the "Ohio Historic Preservation Tax Credit Application Selection" window, the applicant can either begin a new application or revisit existing applications by clicking the drop-down button and either selecting "Create New" or selecting a previously created application (designated by building/project name). Note that applications will still be accessible to view and print after they are submitted (in a read-only format) via this drop-down button.

### TIPS

- Use the "Tab" button to move between fields in the application.
- **Never** use the web browser's back button. Use the buttons at the top and bottom of each page ("Previous" and "Save and Continue") to navigate forward and reverse.
- Information entered will not be saved until the "Save" or "Save and Continue" button at the top or bottom of each page is used.
- While moving through the application, click the "Save" button periodically to save application information.
- Attachments for requested information are attached at the bottom of each application page. The "Upload Attachments" section at the bottom of every page includes a "Category" drop-down to identify

each attachment. Please select the appropriate Category/Attachment for the document being attached as requested in the application.

- The application will accept attachments in PDF, Excel, JPG, and Word format. However, PDF format is recommended for all attachments except the photo of your project. Try to keep file sizes at 5 MB or smaller.
- Prior to submission, the application will allow applicants to review and edit responses.
- To exit out of the application before submittal, click “Save” and then “Cancel”. The partially completed applications will be retained in the portal and can be accessed through the log-in process via the drop-down button in the “Ohio Historic Preservation Tax Credit Application Selection” window.
- To logout of the application and application portal, click the “Logout” indicator in the top right-hand corner of the application.

## Step-by-Step Instructions

The following step-by-step instructions are provided to assist applicants in completing the online application. Applicants are responsible for reading and complying with all instructions prior to submission.

### SECTION A – Eligibility Criteria

#### A1. Trade Secret Information

All applicants are strongly discouraged from including in an application any information that the applicant considers to be a “trade secret,” as that term is defined in Section 1333.61(D) of the Ohio Revised Code. All information submitted in the application is public information unless a statutory exception exists that exempts it from public release. If any information in the application is to be treated as a trade secret, the applicant must:

- **IDENTIFY** each and every occurrence of the information within the application and/or any attachments with an asterisk before and after each line containing trade secret information and underline the trade secret information itself.

To determine what qualifies as trade secret information, refer to the definition of “trade secret” in Section 1333.61(D) of the Ohio Revised Code, which is reproduced below for reference:

(D) “Trade Secret” means information, including the whole or any portion or phase of any scientific or technical information, design, process, procedure, formula, pattern, compilation, program, device, method, technique, or improvement, or any business information or plans, financial information, or listing of names, addresses, or telephone numbers, that satisfies both of the following:

- (1) It derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
- (2) It is the subject of efforts that are reasonable under the circumstances to maintain its secrecy.

The Ohio Department of Development requires non-disclosure agreements from all non-agency persons who may have access to applications containing trade secret information, including evaluators.

- **SELECT** the appropriate option to indicate if the application contains trade secret information.

This page can be revisited at the end of the application process.

#### A2. Project Information Summary

- **COMPLETE** the Project Information fields. The 'Name of Building/Project' field should match the historic building name used on the applicable Part 2 form. A modern development name should only be used if the project includes multiple historic buildings.
- **COMPLETE** the Financial Information fields. These financial values are explained in C6 – Leveraged Investment.
- **COMPLETE** the Applicant Information fields. The 'Applicant Name' is the entity, LLC, or individual who is applying for credits and not necessarily the name of the person completing the form. The 'Representative Name' should be the name of the authorized representative of the project applicant (owner or lessee). Applicants must complete at least one of either the Federal Employer Identification Number or the Social Security Number. Please make all attempts to complete these fields. Note that the applicant entity needs to be registered in the State of Ohio. For more information on how to register please consult the Ohio Secretary of State website (<https://www.sos.state.oh.us>).
- **COMPLETE** the Project Contact Information fields. The 'Contact Name' should be the name of the individual that should be copied on correspondence relating to the application and can be a consultant or other member of the development team.

#### A3. Description and Scope of Project

- **COMPLETE** the Description and Scope of Project fields in detail.

#### A4. Proof of Ownership or Leaseholder Interest

In accordance with Section 149.311 of the Ohio Revised Code, as of the application submission deadline the applicant must be either 1) the fee simple owner of the building(s) or 2) a qualified lessee subject to a lease agreement for the building(s) and eligible for the federal historic preservation tax credit under 26 U.S.C. 47. Governmental entities are not eligible to apply. All properties included in the application must be owned or leased by the applicant entity.

- **SELECT** the appropriate option to indicate ownership or leaseholder interest.
- **ATTACH** one of the following in PDF format:
  - If the applicant is a fee simple owner, provide at least one of the following:

- a) Property deed or county auditor's card for all parcels; or
  - b) Executed sale and purchase agreement for all parcels if the property was sold recently and a deed is not yet available. A deed or county auditor's card will need to be provided to demonstrate the sale when available; or
  - c) Executed closing documents for all parcels (settlement sheets).
- If the applicant is a qualified lessee, provide an executed lease agreement for a term equal to or exceeding the lease term requirements under 26 U.S.C. 47(c)(2)(B)(vi), which requires a minimum of 27.5 years for residential rental property and 39 years for nonresidential real property.
  - **LABEL** the attachment using the Category drop down menu on the right with the following: **"ATTACHMENT A4: Verification of ownership or leaseholder interest"**

#### A5. Major Factor

The issuance of a tax credit must be a major factor in the applicant's decision to rehabilitate the historic building or to increase the level of investment in the rehabilitation.

- **SELECT** the appropriate option to indicate how the tax credit is a major factor in the project.

If the tax credit is a major factor in the applicant's decision to rehabilitate the historic building(s):

- **COMPLETE** the text boxes to explain why the tax credit is a major factor and indicate if any major rehabilitation work has commenced at the property.

If the tax credit is a major factor in the applicant's decision to increase the level of investment in the rehabilitation:

- **ATTACH** a third-party cost-certification of the costs incurred as of the application submission.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **"ATTACHMENT A5: Third-party cost certification"**
- **COMPLETE** the text boxes to explain why the tax credit is a major factor, identify tangible additional investment planned, and indicate what work has commenced at the property.

#### A6. Pre-Application Meeting

All applicants must schedule a pre-application meeting with the SHPO prior to submitting an application.

- **ATTACH** the pre-application meeting confirmation or email from the SHPO.



- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT A6 – Pre-application meeting confirmation”**

#### Application Fee

- **COMPLETE** the Application Fee fields. The application fee amounts are available on page 4 of this guide. The “Organization/Person paying the fee” field should be the name of the individual or company that is listed as the account holder.
- **MARK** your application fee payment with the project name and address in the memo.
- Your application fee must arrive by 5:00 pm March 31, 2022 electronically via wire transfer. Please contact Lisa for details on how to do this.
- Fees will no longer be accepted via check.

#### A7. Project Photo

All applicants must attach one photo of the primary elevation of their project in JPG or TIF format. Please do not submit a Google Maps or auditor screenshot. This photo will be used for review and promotional purposes so provide one that you would like to be on the poster of awarded projects if your project is awarded tax credits. If the project has multiple buildings, attempt to capture them all in one photo. If this is not possible, please submit photos of each building individually.

- **ATTACH** a photo in JPG or TIF format.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT A7 – Project Photo”**

#### A8. Project Schedule

- **SELECT** the appropriate option to indicate if the project will be staged. A non-staged project is scheduled to be completed in 24 or fewer months. A staged project is scheduled to be completed in 60 or fewer months. Only staged projects are permitted to certify and seek a portion of the tax credits at the conclusion of project stages before the completion of the project.
- **ATTACH** a project completion schedule that includes design, permitting, construction start/end, tenant build-out, occupancy and other important project milestones. If the rehabilitation period is 60 months, provide documentation that explains the reasoning for distributing the rehabilitation work over a period of 60 months. Also include a breakdown of the work to be completed within each stage.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT A8: Project Schedule”**

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## SECTION B – Rehabilitation Information

- **SELECT** the appropriate option to indicate the project type. A State Only Project means a project that does not seek Federal Historic Preservation Tax Credits. A Combined State and Federal Project means a project that seeks both federal and Ohio Historic Preservation Tax Credits and references a Federal Historic Preservation Certification Application.

### B1. Historic Building Designation

- **ENTER** the number of historic buildings included in the application.
- **SELECT** the appropriate option to indicate the historic designation of the building. For applications that include more than one building, multiple selections can be made.
- **LIST** each building and its appropriate historic designation, if the application includes more than one building.

If the historic building(s) are individually listed on the National Register of Historic Places:

- **ATTACH:**
  - Evidence that the building has been nominated the National Register. Possible documentation could include but is not limited to: nomination cover sheet that shows when it was approved by the National Park Service, weekly list from the National Park Service, or correspondence from the State Historic Preservation Office. Contact the State Historic Preservation Office if you need a copy of documentation related to your building.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT B1: Historic designation documentation”**

If the historic building(s) is located in a National Register historic district:

- **COMPLETE** the “Name of Historic District” field.
- **ATTACH:** Evidence that the building contributes to a district that has been nominated the National Register. Possible documentation could include but is not limited to: nomination cover sheet that shows when the district was approved by the National Park Service, weekly list from the National Park Service, or correspondence from the State Historic Preservation Office. Contact the State Historic Preservation Office if you need a copy of documentation related to your building.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT B1: Historic designation documentation”**

If the historic building(s) is designated as a local landmark or located in a Certified Local Government historic district:

For Combined State and Federal Projects qualifying for the Ohio Historic Preservation Tax Credit due to local landmark or historic district listing by a Certified Local Government, the applicable documentation below must be submitted. This information must be submitted in addition to a preliminary Federal Part 1 Historic Preservation Certification Application (which must include a draft National Register of Historic Places nomination form).

- **ATTACH** one of the following:
  - If the building is designated as a local landmark by a Certified Local Government, provide a copy of the signed and dated local ordinance establishing the listing. The effective date of the local listing must be included.
  - If the building is located within a historic district designated by a Certified Local Government, provide a copy of the signed and dated local ordinance establishing the listing and a statement from the Certified Local Government contact person that the property contributes to the significance of the local historic district. The effective date of the local listing must be included. A copy of the historic district map showing boundaries and specific location of the property on the map must also be submitted as part of the attachment.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT B1: Historic designation documentation”**

## B2. Historic Rehabilitation Information

For Combined State and Federal Projects:

- **COMPLETE** the Date Submitted fields.
- **ATTACH** a copy of the Federal Part 1 Historic Preservation Certification Application cover pages for all historic buildings included in the project if the historic building(s) is not individually listed on the National Register of Historic Places and a Part 1 is applicable. Do not attach the entire Part 1 form, drawings or photographs.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT B2.2: Copy of the Federal Part 1 Historic Preservation Certification”**
- **ATTACH** a copy of the Federal Part 2 Historic Preservation Certification Application cover pages for all historic buildings included in the project. Do not attach the entire Part 2 form, drawings or photographs.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT B2.3: copy of the Federal Part 2 Historic Preservation Certification”**

For State Only Projects:

- **COMPLETE** the “Date Part 1 & 2 Submitted to SHPO” field.
- **ATTACH** a copy of the Ohio Part 1 & 2 Historic Preservation Certification Application project information pages for all historic buildings included in the project. Do not attach the entire Ohio Part 1 & 2 form, drawings or photographs.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT B2.1: Ohio Part 1 & 2 Historic Preservation Certification”**

## SECTION C – Scoring Criteria

### Criterion A – Regional Distributive Balance

#### C1. Jurisdictional Balance

**Definition:** Weighted preference for applications in jurisdictions (municipalities or townships) where tax credits were not approved in previous rounds.

- **REFERENCE** Appendix A for information regarding previously approved applications in the jurisdiction.
- **SELECT** the appropriate scoring option based on the number of approved projects in the jurisdiction.

Jurisdictional Balance Scoring	Points
0 Projects	8
1-3 Projects	6
4-5 Projects	4
6-8 Projects	3
More than 8 Projects	2

#### C2. County Per Capita Balance

**Definition:** Weighted preference for applications in counties with lower per capita tax credits approved in previous rounds.

- **REFERENCE** Appendix B for information regarding previously approved tax credits in the county.
- **SELECT** the appropriate scoring option based on the number of approved tax credits in the county.

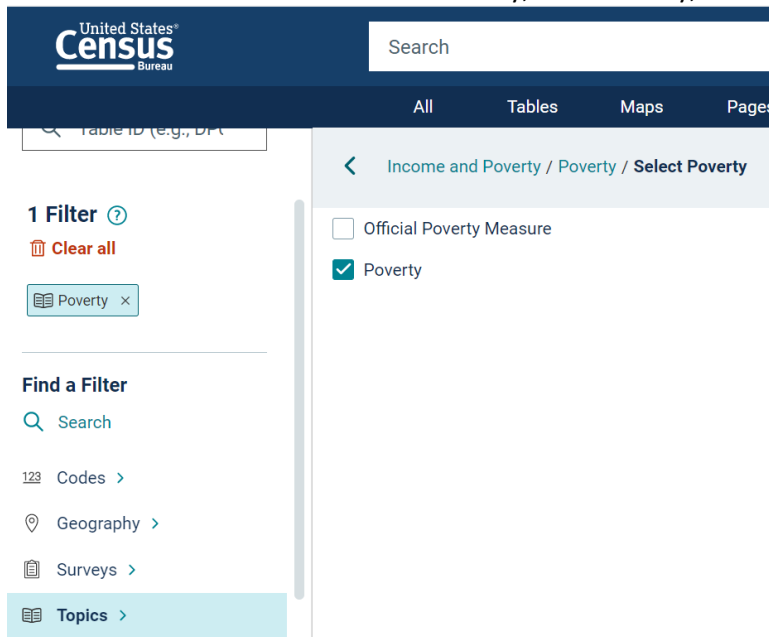
County Per Capita Scoring	Points
\$0 - \$9.99	7
\$10 - \$19.99	6
\$20 - \$29.99	5
\$30 - \$39.99	3
More than \$40	2

The top scoring applicant from each jurisdiction (municipalities or townships) will receive the maximum 15 points for the C1 – Jurisdictional Balance and C2 – County Per Capita Balance. Applicants should complete scoring for these criteria using the values from Appendices A and B. Upon final scoring review, the Ohio Department of Development will adjust the score for the top scoring applicants from each jurisdiction to the maximum points for these questions (15 points total).

**C3. Benefit to Low-Income in Jurisdiction**

**Definition:** Weighted preference for projects that will create economic growth in distressed areas. This measure uses the poverty rate of the jurisdiction (municipality or township).

- **RESEARCH** the poverty rate in the jurisdiction by using the U.S. Census Bureau’s estimates:
  - 1) Open your web browser to data.census.gov.
  - 2) Click on Advanced Search in the center of the page.
  - 3) Then, you will want to set all of your filters. First, select Topics under the “Find a Filter” menu, then a Topics menu will appear.
    - ✓ Select Income and Poverty, then Poverty, then Poverty. It should look like this.



- 4) Then select Geography under the “Find a Filter” menu. A Geography menu will appear. Select Place, then Ohio, then your jurisdiction. In the case of a township, look for “County Subdivision” under the Geography Type column, and click on the township name.
- 5) Then select Surveys under the “Find a Filter” menu. In the menu, choose “American Community Survey” under the “Surveys” tab, then “5-year Estimates,” then Subject Tables.
- 6) Then select Years under the “Find a Filter” menu. In the menu, choose 2019. Then click on the “Search” button.
- 7) The results page under the “ALL” tab will appear. The information in the topmost box is what you need to look at. You can also look at the information under the “TABLES” tab and look at the column labeled “percent below poverty level” for the “population for whom poverty status is determined.” Save one of these results pages as a PDF. You can do this by taking a screenshot and saving it or by using your browser’s print function and then choosing “save as PDF” as the print destination.

- **SELECT** the appropriate scoring option based on the column marked “percent below poverty level” for the row marked “Population for whom poverty status is determined.”

Benefit to Low-Income in Jurisdiction Scoring	Points
30% or greater poverty	5
25 - 29.99% poverty	4
20 - 24.99% poverty	3
15 - 19.99% poverty	2
Less than 15% poverty	1

- **ATTACH** the Census Bureau Results Page.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT C3: Census Bureau Results”**

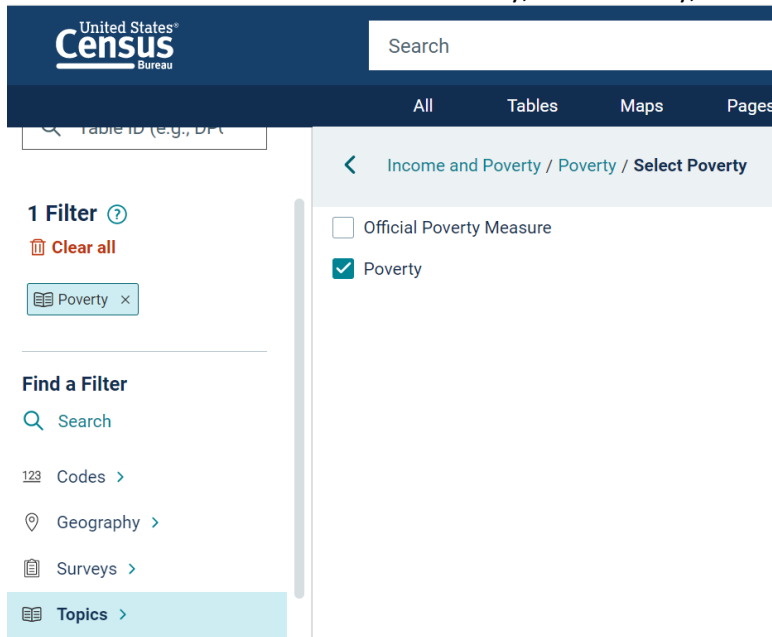
#### C4. Benefit to Low-Income in Census Tract

**Definition:** Weighted preference for projects that will create economic growth in distressed areas. This measure uses the poverty rate of the census tract.

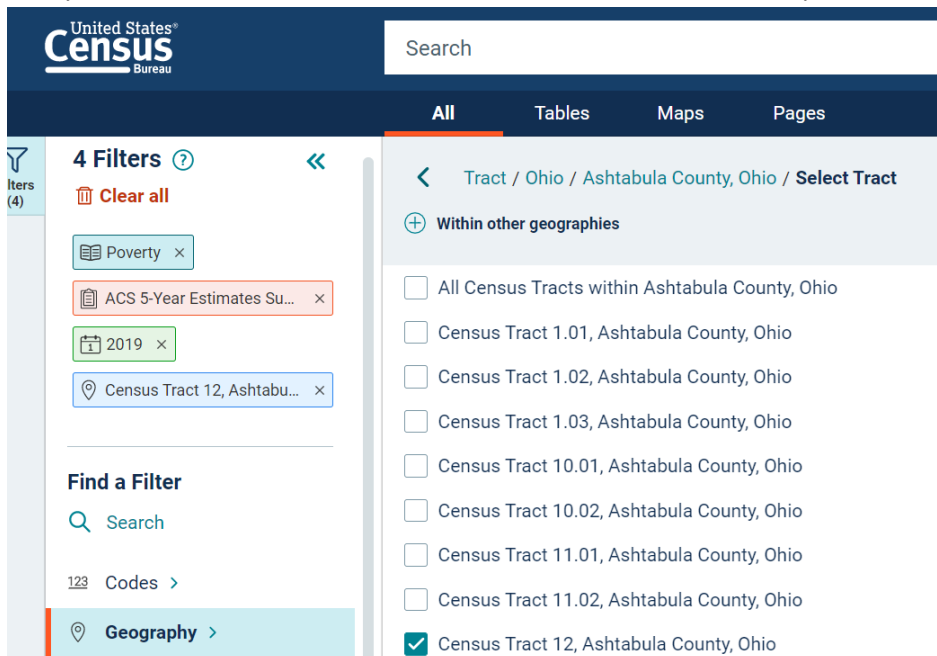
- **RESEARCH** the poverty rate in the census tract by using the U.S. Census Bureau’s estimates:
  - 1) Open your web browser to [data.census.gov](http://data.census.gov).
  - 2) Click on Advanced Search in the center of the page.

- 3) Then, you will want to set all of your filters. First, select Topics under the “Find a Filter” menu, then a Topics menu will appear.

✓ Select Income and Poverty, then Poverty, then Poverty. It should look like this.



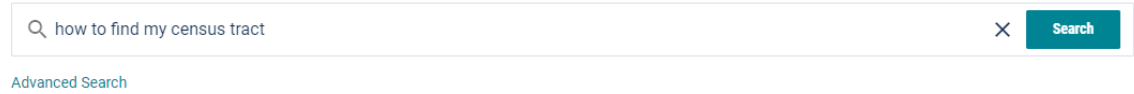
- 4) Now to do the Census Tract part, just choose differently in the Geography menu. It should go Geography > Tract > Ohio > Your County, Ohio > tract number.
- 5) On the old site, you could put in your address and it would pull up your tract. It doesn't appear that you can do that in the new interface, but you can look up your tract number elsewhere so that you know what to choose here. See below for how to look it up.



This is how to find your project’s Census Tract. Enter this into search bar on the start page

## Explore Census Data

The Census Bureau is the leading source of quality data about the nation’s people and economy.



Then, when search results come up, select “Maps” in the top blue banner. Select Census Tract under the “Geographies” option, then zoom in to your building location (for some reason this map view always defaults to the middle of Kansas, so you’ll have to recenter and zoom to your place).

Then, in the map, look for the little burgundy numbers – those are the Census Tract numbers. There are many other accurate ways to do this! We’ll check your work, so don’t worry about it. Contact us with any questions.

- 6) Then select Surveys under the “Find a Filter” menu. In the menu, choose “American Community Survey” under the “Surveys” tab, then “5-year Estimates,” then Subject Tables.
- 7) Then select Years under the “Find a Filter” menu. In the menu, choose 2019. Then click on the “Search” button.
- 8) The results page under the “ALL” tab will appear. The information in the topmost box is what you need to look at. You can also look at the information under the “TABLES” tab and look at the column labeled “percent below poverty level” for the “population for whom poverty status is determined.” Save one of these results pages as a PDF. You can do this by taking a screenshot and saving it or by using your browser’s print function and then choosing “save as PDF” as the print destination.

Should the project be located within 1000 feet of a census tract boundary, the poverty rates of the tract containing the project and the neighboring tract may be averaged. Applicants seeking to use the average poverty rate of two census tracts for this measure must submit 1) a map of the project location showing the boundary of the tracts and 2) the U.S. Census Bureau’s Results page for both census tracts. These items should be included in Attachment C4. Clearly note in your attachment that you are averaging more than one tract for your score.

- **SELECT** the appropriate scoring option based on the column marked “percent below poverty level” for the row marked “Population for whom poverty status is determined.”

Benefit to Low-Income in Census Tract	Points
50% or greater poverty	5
40 - 49.99% poverty	4
30 - 39.99% poverty	3
20 - 29.99% poverty	2
Less than 20% poverty	1

- **ATTACH** the Census Bureau Results Page.



- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT C4: US Census Bureau Results”**

C5. Benefit to Unemployed in County

**Definition:** Weighted preference for projects that will create economic growth in distressed areas. This measure uses the unemployment rate of the county released during the month preceding the start of the application period (December 2021 for Round 28).

- **REFERENCE** Appendix C for county unemployment rates, calculated by the Ohio Department of Job and Family Services.
- **COMPARE** the county unemployment rate to the state unemployment rate. The Ohio Unemployment Rate as of December 2021 was 3.4% percent.
- **SELECT** the appropriate scoring option based on the county unemployment rate.

Benefit to Unemployed in County Scoring	Points
Unemployment greater than 2% above Ohio rate	5
Unemployment 1-2% above Ohio rate	4
Unemployment within 1% of Ohio rate	3
Unemployment 1-2% below Ohio rate	2
Unemployment greater than 2% below Ohio rate	1

Criterion B – Potential Economic Impact

C6. Leveraged Investment

**Definition:** Weighted preference for applicants who leverage additional project investment. This measure is based on the Leveraged Investment Ratio:

$$\text{Total Project Investment} \div \text{Tax Credit Requested} = \text{Leveraged Investment Ratio}$$

- **VERIFY** the Financial Information fields to ensure the values updated correctly from A2 – Project Information Summary and meet the following guidelines:
  - Total Project Investment – All costs associated with the project from the beginning of the involvement by the current applicant or development entity. This figure includes acquisition costs, holding costs, marketing, parking lots or structures, new construction, additions, landscaping, site work, furniture and fixtures, and other investments directly related to the project and to be undertaken by the applicant.

- Remaining Investment to Complete Project – All costs necessary to complete the full project scope listed in this application, removing any costs already expended at the time of application submission. This number represents the total amount needed to fully finance the project.
- Qualified Rehabilitation Expenditures (QREs) – As defined in Section 149.311 of the Ohio Revised Code, Qualified Rehabilitation Expenditures means expenditures paid or incurred during the rehabilitation period, and before and after that period as determined under 26 U.S.C. 47, by an owner or qualified lessee of a historic building to rehabilitate the building. Qualified Rehabilitation Expenditures include architectural or engineering fees paid or incurred in connection with the rehabilitation, and expenses incurred in the preparation of nomination forms for listing on the National Register of Historic Places. Qualified Rehabilitation Expenditures do not include any of the following:
  - a) The cost of acquiring, expanding, or enlarging a historic building;
  - b) Expenditures attributable to work done to facilities related to the building, such as parking lots, sidewalks and landscaping;
  - c) New building construction costs.
- Ohio Historic Preservation Tax Credit Requested – As defined in Sections 5725.151, 5725.34, 5729.17, 5733.47 and 5747.76 of the Ohio Revised Code, the tax credit shall equal no more than 25 percent of the QREs and shall not exceed \$5 million dollars. While the Ohio Department of Development grants tax credits, the actual claiming of tax credits is subject to limitations imposed under the Ohio Tax Code, Title 57 of the Ohio Revised Code.

Although applicants may request tax credits up to 25 percent of QREs, applicants should request only the amount of tax credits necessary to complete the project. Reducing your request will increase the Leveraged Investment Ratio and may increase your score.

Completing the Financial Information fields represents a commitment by the applicant to make the investments identified should the application be approved and should align with the Description and Scope of Project and Financial Information provided in the application. Costs associated with the rehabilitation of historic buildings that are not being rehabilitated in accordance with the U.S. Secretary of the Interior’s Standards for Rehabilitation cannot be included in Leveraged Investment calculation.

- **SELECT** the appropriate option based on the calculated Leveraged Investment Ratio. If the Financial Information is adjusted, use the “Previous” buttons at the top or bottom of the page to reverse and return to the page for the Leverage Investment Ratio to recalculate.

Leveraged Investment Scoring*	Points
More than 10.0	10
9.1 to 10.0	9
8.1 to 9.0	8
7.1 to 8.0	7
6.1 to 7.0	6
5.1 to 6.0	5

4.1 to 5.0	3
4.0 or less	1

\*In calculating the scores above, values will not be rounded.

- **ATTACH** a copy of the project budget. The project budget should include a detailed listing of all costs including: acquisition, construction, furniture, fixtures, equipment, construction interest, architectural design, engineering, taxes and insurance, legal and professional fees, financing fees, project overhead, development fees, marketing and advertising, and any other major expenditure involved in project. The project budget should demonstrate how the Total Project Investment, Remaining Investment to Complete Project, Qualified Rehabilitation Expenditure, and Ohio Historic Preservation Tax Credit Requested values were calculated.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT C6: Project Budget”**

C7. Financing Committed

**Definition:** Weighted preference for applicants who have financing and/or equity in place and are ready to begin development immediately.

- **VERIFY** the Ohio Historic Preservation Tax Credit field to ensure the value is correct.
- **COMPLETE** the Federal Historic Preservation Tax Credit field. The Federal Historic Preservation Tax Credit value should not exceed 20 percent of QREs. Note that if the historic building(s) is not yet listed on the National Register of Historic Places as of the application deadline the Federal Historic Preservation Tax Credit cannot be counted.
- **COMPLETE** the table with each type of committed financial source (e.g. bank loans, developer equity, local incentives) and the amount each source will provide. A separate line should be used for each unique commitment and/or funder.
- **NOTE** the Attachment identifier next to each source (i.e. C7.1, C7.2, etc.). These will be necessary when attaching the documentation for each financial source.
- **ATTACH** documentation for all identified financing sources. All financing sources (Private Financing, Public Financing and Developer Equity) must be documented meeting the guidelines below. Financing sources without proper documentation will be removed from the percentage of financing committed.
  - **Private Financing** in place can be demonstrated through any or all of the following documents:
    - a) **Term Sheet:** This document is signed by a bank, financial institution or other investment source declaring their total financial investment in the project, the date that the investment will be made, the term of the investment and any conditions upon closing.

- 
- b) Executed Loan Agreement: This is a legal document demonstrating a commitment to loan a specific amount of financing for the project, the date the commitment was made and an established period of time in which the investment will take place.
  - c) Commitment Letter: This document is signed by a bank, financial institution or other investment source declaring their total financial investment in the project, the date the commitment was made and an established period of time in which the investment will take place. **Letters of interest will be accepted but will not count toward the percentage of financing committed.**
- **Public Financing** in place can be documented through an approved council or commission ordinance, development agreement, letter of commitment or approval letter from a jurisdiction or public agency and must contain the dollar amount of financing for the project.

Specific Public Financing Source Requirements:

- a) New Markets Tax Credits: Provide 1) a letter of commitment from a Community Development Entity (CDE) committing tax credits to the project and 2) a letter from the CDE verifying that the organization has remaining new markets allocation currently available for the project.
- b) HUD Insured Loans (e.g. Section 220, 221, etc.): Provide 1) a term sheet or executed loan agreement from a HUD approved lender meeting the private financing guidance requirements for term sheets and agreements and 2) documentation from HUD approving the pre-application and inviting the applicant to submit the final firm application for the project (Invitation to Submit letter).
- c) 4 Percent Housing Tax Credit: Provide a draft letter of eligibility from the Ohio Housing Finance Agency determining the project is eligible for credits. Any equity commitments for the credits are requested but will not count toward the percentage of financing committed.
- d) 9 Percent Housing Tax Credit: Provide a letter of approval from the Ohio Housing Finance Agency approving a credit reservation for the project. Any equity commitments for the credits are requested but will not count toward the percentage of financing committed.

Please Note: Tax abatements will not count toward the percentage of financing committed. Documentation of tax abatements can be included in Section C11: Local Participation and Support to document city or county financial support.

- **Developer Equity** in place requires at a minimum 1) a signed letter of commitment from the developer containing the dollar amount committed and 2) information from a bank, financial institution or third-party accountant that clearly demonstrates the committed developer equity is unencumbered and available for this project.

Please Note: Deferred Developer Fee documentation will be accepted but will not count toward the percentage of financing committed.

- **LABEL** the attachments using the Category drop down menu on the right with the following: **“ATTACHMENT C7.XX: Public, Private, or Other Source”**
- **SELECT** the appropriate option to indicate whether the project will be awarded or seek additional state-administered funding.
- **SELECT** the appropriate scoring option based on the calculated Percentage of Financing Committed.

Financing Committed Scoring	Points
100% of financing in place	15
90% of financing in place	13
80% of financing in place	11
70% of financing in place	9
60% of financing in place	7
50% of financing in place	5
40% of financing in place	3
Less than 40% of financing in place	1

#### C8. Affordable Housing

**Definition:** Weighted preference for projects that include affordable housing as a portion of their end use. There are two components to the scoring measure: demonstrating that the project has an affordable housing component and documenting the portion of the total square feet of the project that will have an affordable housing end use. Applicants must show that the project has a commitment from a recognized affordable housing funding source that has a defined compliance period including, but not limited to, LIHTC, HDAP, HOME, or FHaAct50.

- **SELECT** the appropriate scoring option based on the project square footage.

Affordable Housing as percent of total project square feet	Points
80% to 100% of project sq.ft. affordable housing end use	5
60% to 79.99% of project sq.ft. affordable housing end use	4
40% to 59.99% of project sq.ft. affordable housing end use	3
20% to 39.99% of project sq.ft. affordable housing end use	2
More than 0% to 19.99% of project sq. ft. affordable housing end use	1
0% of project sq.ft. affordable housing end use	0

- **ATTACH** documentation evidencing a funding commitment from an affordable housing funding source that shows it has been committed as of the application deadline. This source should be recognized as one that supports the development of affordable rental housing in the state of Ohio and can include,

but is not limited to, the sources listed on the Ohio Housing Finance Agency’s website: <https://ohiohome.org/ppd/default.aspx>. Approval of sources listed here, as well as any other source, is subject to Development review. Please refer to Section C7 for documentation guidelines.

- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT C8.1: Affordable Housing funding commitment”**
- **ATTACH** documentation detailing the total square feet of the project dedicated to an affordable housing end use. This can include documents from affordable housing funding commitments, highlighted site/floor plans with square footage clearly delineated, or other documentation subject to Development review.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT C8.2: Affordable Housing square footage”**

### C9. Physical Scope and Construction Jobs

**Definition:** Weighted preference for larger projects to maximize economic stimulus effect on a community by creating more immediate construction jobs and providing a larger area of physical improvement. Physical scope may include rehabilitated historic and non-historic buildings, building additions, and new construction that is part of the project scope identified in the application. Non-conditioned spaces such as roof decks and open-air parking structures should not be included, but unoccupied spaces such as attics or basements should be included. The square feet listed here for historic buildings should match the square feet listed on the Part 2 if the project is also applying for Federal historic preservation tax credits.

- **SELECT** the appropriate scoring option based on the project square footage.

Physical Scope and Construction Jobs	Points
More than 120,000 square feet	10
100,000 to 120,000 square feet	9
80,000 to 99,999 square feet	8
60,000 to 79,999 square feet	7
50,000 to 59,999 square feet	6
40,000 to 49,999 square feet	5
30,000 to 39,999 square feet	4
20,000 to 29,999 square feet	3
10,000 to 19,999 square feet	2
Less than 10,000 square feet	1

- **ATTACH** a copy of the architectural drawings cover page, site plan, or county auditor’s web page indicating the square feet of space proposed for the project. Architectural drawings must clearly note

total square feet of the building and/or each floor. Drawings submitted to the State Historic Preservation Office should not be referenced.

- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT C9: Third-party documentation of physical scope”**

C10. Vacant Property

**Definition:** Weighted preference for buildings that are underutilized or not occupied and will generate a greater catalytic impact upon completion of their rehabilitation. Vacancy is measured over a one-year period ending on the date on which the application must be submitted (April 1, 2021 to March 31, 2022 for Round 28).

- **SELECT** the appropriate scoring option based on the vacancy of existing building(s).

Vacant Property	Points
95% - 100% vacant	15
85 - 94.99% vacant	13
70 - 84.99% vacant	11
55 - 69.99% vacant	9
40 - 54.99% vacant	7
25 - 39.99% vacant	5
10 - 24.99% vacant	3
Less than 10% vacant	1

- **ATTACH** a table that demonstrates the average vacancy rate of the existing building(s) in the project, including the historic building(s) and any existing non-historic buildings. As demonstrated in the example table below, include a row for each floor, a column for each month of the one-year period and columns for both the 12-month average vacancy and percentage of building vacancy for each floor.

If the property was 100 percent vacant for the full year, a statement of vacancy may be provided in place of a floor-by-floor table.

Example vacancy table:

Floor	Square Feet	Month A Vacancy	Month B Vacancy	Month C Vacancy	12 Month Average Vacancy	% of Building Vacancy
1	S1	A1%	B1%	C1%	$\frac{A1\%+B1\%+C1\%+\dots}{12 \text{ months}} = FV1$	$\frac{S1 \text{ sq. ft.}}{T \text{ sq. ft.}} \times FV1 = FP1$
2	S2	A2%	B2%	C2%	FV2	FP2
3	S3	A3%	B3%	C3%	FV3	FP3
Total Sq. Ft.	$S1+S2+S3+\dots = T$	Total Average Vacancy Rate for Year				$FP1+FP2+FP3+\dots$

During the application review period, the Ohio Department of Development may make site visits to assist in verifying project vacancy.

- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT C10: Statement of vacancy or vacancy table”**

C11. Local Participation and Support

**Definition:** Weighted preference for applicants who have received an indication of support from their local jurisdiction (municipality or township) or county.

- **SELECT** the appropriate scoring option based on the highest level of participation.

Local Participation and Support	Points
Financial Commitment AND Indication of Local Support	5
Financial Commitment	3
Indication of Local Support	2
No Indication of Support	0

If the applicant is documenting an indication of local support:

- **ATTACH** a letter supporting an Ohio Historic Preservation Tax Credit application for the project. The letter should be signed by the Mayor of the local jurisdiction, or the County Executive of the county where the project is located and must be dated within one year of the date this application was submitted.

**OR**

- **ATTACH** a resolution of support passed by the Township Trustees of the township, or the County Commissioners of the county, where the project is located supporting the project’s application for the Ohio Historic Preservation Tax Credit. The resolution must be dated within one year of the date this application is submitted. **Additional points will not be awarded for submitting multiple letters of support from more than one local entity.**
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT C11.1: Indication of Local Support”**

If the applicant is documenting a Financial Commitment:

- **ATTACH** documentation of commitment from a jurisdiction and/or county that meets the Financing Committed Guidelines found in C7 – Financing Committed. The financial commitment can include loans, grants, tax abatements, land/building donations, and tax increment financing revenues and must support activities that are in close proximity and directly related to the project. The commitment must have been made within one year of the application deadline. If it was made prior to that, provide a letter from the jurisdiction or county to reconfirm the commitment.

The amount of commitment must exceed three percent of the Remaining Investment to Complete Project value.



For tax abatements, if a final application or ordinance has not been approved but the jurisdiction has an established abatement program covering the geography of the project location, provide a letter from the local jurisdiction stating the proposed project meets the eligibility requirements for tax abatement, that the proposed project is within the existing zone or area as of the application date, and include the expected rate/term of the tax credit.

- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT C11.2: Documentation verifying the financing contribution...”**

If the applicant is documenting Financial Commitment via tax abatement:

- **ATTACH** an estimate for the total taxes projected to be abated over the length of the abatement and an explanation for how the estimate was calculated. This estimate will be used to verify that the amount of commitment will exceed three percent of the Remaining Investment to Complete Project value.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT C11.3: Estimate of the value of the abatement”**

## C12. Job Commitments

**Definition:** Weighted preference for projects with job and space commitments already in place. Space commitments for non-residential end uses must come from the actual business, institution, or other users that will occupy the space, not a master tenant.

- **SELECT** the appropriate scoring option based on the amount of the property leased, through a non-residential lease or residential developer commitment.

Job Commitments Scoring	Points
100% Leased	4
75% to 99.9% Leased	3
50% to 74.9% Leased	2
25% to 49.9% Leased	1
Less than 25% Leased	0

If the applicant has secured non-residential tenants:

- **ATTACH** an executed lease or signed Letter of Intent for each committed tenant in the project. Letters of Intent should be written on company letterhead and include the amount of space each tenant commits to occupy and the length of the commitment.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT C12.1: Executed leases or signed commitment letter”**

If the applicant has secured multiple non-residential tenants:

- **ATTACH** a table or description summarizing the total percentage of the project that has an executed lease or Letter of Intent in place.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT C12.2: Description summarizing the total percentage of the project that is leased”**

If the applicant is developing residential units as part of the project:

- **ATTACH** a letter of commitment from the developer committing to construct the residential units. The letter should detail the amount of space the residential units will occupy.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT C12.3: Letter of commitment from the project developer”**

## SECTION D – Cost-Benefit Analysis

**Definition:** Weighted preference for projects with the greatest return on investment (ROI). The Ohio Department of Development will conduct a cost-benefit analysis based on the data provided in this section and award up to six points based on the ROI from the project to state and local governments. These points are not self-scored by the applicant.

Cost-Benefit Analysis Scoring (Not Self-Scored)	Points
ROI of 5.0 or more over 10 years	6
ROI between 3.0 and 4.99 over 10 years	5
ROI between 2.25 and 2.99 over 10 years	4
ROI between 1.5 and 2.249 over 10 years	3
ROI between .75 and 1.49 over 10 years	2
ROI greater than 0 and less than .75 over 10 years	1
ROI of 0 or below over 10 years	0

### D1. Property Market Value and Proposed End Use

- **COMPLETE** the Property Market Value and Proposed End Use fields. The “Current Market Value of Property” should be based on a recent sale, appraisal or county auditor’s record. The “Future Appraised Value, Post-Construction” should be based on the projected value based on an as-complete appraisal, income approach valuation or other documented valuation.
- **SELECT** the appropriate option to indicate whether the project will utilize the charitable property tax exemption authorized in Section 5709.121(B) of the Ohio Revised Code.

- **INPUT**, for each end use, the percentage each use will occupy in the project, based on the total project area. The analysis will use this data to calculate property tax. Note this percentage needs to calculate to 100%.

#### D2. Construction

- **COMPLETE** the Construction Jobs fields representing labor required to construct the project. These job numbers should be calculated on a full time equivalent (FTE) basis. "Full-time equivalent employees" means the quotient obtained by dividing the total number of hours for which employees were compensated for employment in the project by two thousand eighty (2,080). Non-staged projects should only include impacts during the first two years. The analysis will use this data to calculate income taxes.

#### D3. Operations

- **COMPLETE** the Operations Jobs and Receipts fields representing labor required to operate the project and anticipated revenues (e.g. rents) once complete. These job numbers should be calculated on a full time equivalent (FTE) basis. "Full-time equivalent employees" means the quotient obtained by dividing the total number of hours for which employees were compensated for employment in the project by two thousand eighty (2,080). The analysis will use this data to calculate income and sales taxes.

#### D4. Residents

- **COMPLETE** the Residents fields representing residential units anticipated to be occupied in the project once complete. The "Income" should be based on the average per-unit resident annual income, not the aggregate income for all residents. The analysis will use this data to calculate income taxes.

#### D5. Tenants

- **COMPLETE** the Tenant Jobs and Receipts fields representing labor required by anticipated tenants and their anticipated revenues (e.g. sales). These job numbers should be calculated on a full time equivalent (FTE) basis. "Full-time equivalent employees" means the quotient obtained by dividing the total number of hours for which employees were compensated for employment in the project by two thousand eighty (2,080). The analysis will use this data to calculate income and sales taxes.

#### D6. Hotels

If the applicant is developing a hospitality use as part of the project:

- **COMPLETE** the Hotels Rooms/Keys fields representing anticipated hotel impacts. The analysis will use this data to calculate lodging and sales tax for applicable projects.

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### D7. Cost-Benefit Data Documentation

- **ATTACH** a compiled PDF that includes documentation or references for the cost-benefit data input in D1-6. Acceptable documentation includes, but is not limited to, project pro formas, market studies, appraisals, contractor or architect estimates, business plans and labor or housing statistics.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“ATTACHMENT D7: Cost Benefit Data Documentation”**

### Submission

The final step prior to submitting the application is to complete and upload the Authorized Representative Declaration Form. The form can be downloaded on the submission page following Section D or found on the last page of this document. This form acts as the official signature on the application.

- **ATTACH** a completed Authorized Representative Declaration Form.
- **LABEL** the attachment using the Category drop down menu on the right with the following: **“Authorized Representative Form”**

After completing the fields and attaching all necessary documentation, applicants may click on the “Review and Submit” button at either the top or bottom of the application page. This will provide the applicant an opportunity to review each section of the application and the attachments prior to submission. To change/update any information in the application, click the “Edit” button above each section to go back through that section and update the information. To review the entire application, click the “Expand All Sections” button at the top or bottom of the page.

After this review is completed, click the box next to the authorization statement at the end of the application and click the “Submit” button at the top or bottom of the application page. A prompt-box will come up, verifying that the applicant is ready to submit the application, and noting that once the application is submitted, changes will not be possible. To submit the application, click the “OK” button.

If any required fields have not been completed in the application, an error message will come up at the top of the application. This message will prompt the applicant to complete the identified fields, listing the sections/questions that need to be completed. To access the fields, click the “Edit” button above the identified Section/Question and then complete the required field. Once the identified fields have been completed, the applicant should verify that the box next to the authorization statement is checked and continue through the submittal process again (as outlined above).

Once the application has been submitted to the Ohio Department of Development, a confirmation email will be sent to the email address that was used to establish the login account.

To access and/or print the application after submittal, log in to the application portal with the username/email and password created at the initial log in. Click the “Ohio Historic Preservation Tax Credit Application” on the application list to reach the “Ohio Historic Preservation Tax Credit Application Selection” window. Then, select the appropriate application to view, determined by building/project name. Click the “Expand All Sections” once the application is reached and print the application.

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**REMINDER:** Be sure to submit the application fee, as explained in A6 – Pre-Application Meeting and Application Fee. **An application submission is not fully complete until the fee is received by the Ohio Department of Development.**

## Appendix A – Jurisdictional Balance

This appendix is provided as a reference for C1 – Jurisdictional Balance. Jurisdictions that are not listed below do not have approved applications and should receive the full points for this measure.

Jurisdiction	Approved Applications	Jurisdiction	Approved Applications	Jurisdiction	Approved Applications
Akron	22	Kent	2	Toledo	17
Alliance	1	Kenton	1	Troy	1
Amherst	1	Lakewood	4	University Heights	1
Ashtabula	5	Lancaster	1	Urbana	3
Athens	2	Lebanon	1	Van Wert	2
Bedford	1	Lima	2	Warren	3
Bellefontaine	1	Lockland	1	Washington Court House	1
Berea	2	Lorain	1	Westerville	1
Bexley	1	Mansfield	3	Worthington	1
Cambridge	2	Marietta	2	Xenia	3
Canton	6	Medina	1	Youngstown	8
Chillicothe	1	Mentor	1		
Cincinnati	189	Miamisburg	1		
Circleville	1	Middletown	2		
Cleveland	108	Mount Vernon	1		
Cleveland Heights	1	Nelsonville	1		
Columbus	47	New Concord	1		
Coshocton	2	Newark	6		
Cuyahoga Falls	6	Oberlin	1		
Dayton	18	Painesville	2		
Delaware	3	Pike Township, Perry County	1		
East Liverpool	1	Piqua	1		
Eaton	1	Portsmouth	2		
Fairview Park	1	Ravenna	1		
Findlay	3	Russell Township, Geauga County	1		
Fostoria	1	Salem	1		
Franklin Township, Franklin County	1	Sandusky	2		
Granville	3	Scott Township, Adams County	1		
Hamilton	7	Springfield	4		
Hamilton Township, Warren County	1	St. Clairsville	2		
Hayesville	2	Tiffin	2		

## Appendix B – County Per Capita Balance

This appendix is provided as a reference for C2 – County Per Capita Balance. Counties that are not listed below do not have approved applications and should receive the full points for this measure.

County	Approved Tax Credits	Population (2019 ACS Estimate)	Tax Credits Per Capita
Adams	\$61,756	27,776	\$2.22
Allen	\$2,762,190	103,175	\$26.77
Ashland	\$328,232	53,536	\$6.13
Ashtabula	\$3,584,538	97,830	\$36.64
Athens	\$2,889,519	65,917	\$43.84
Belmont	\$899,496	68,024	\$13.22
Butler	\$15,140,461	380,019	\$39.84
Champaign	\$1,557,368	38,845	\$40.09
Clark	\$11,204,903	134,726	\$83.17
Clinton	\$13,825	41,957	\$0.33
Columbiana	\$1,815,314	103,190	\$17.59
Coshocton	\$312,500	36,585	\$8.54
Cuyahoga	\$353,148,633	1,247,451	\$283.10
Delaware	\$4,705,533	201,135	\$23.39
Erie	\$3,450,903	74,780	\$46.15
Fairfield	\$71,000	154,457	\$0.46
Fayette	\$2,317,206	28,620	\$80.96
Franklin	\$73,877,838	1,290,360	\$57.25
Geauga	\$1,388,496	93,843	\$14.80
Greene	\$1,381,536	166,502	\$8.30
Guernsey	\$1,727,001	39,111	\$44.16
Hamilton	\$177,226,005	813,589	\$217.83
Hancock	\$496,100	75,837	\$6.54
Hardin	\$43,750	31,425	\$1.39
Knox	\$4,655,324	61,481	\$75.72
Lake	\$2,509,575	229,954	\$10.91
Licking	\$4,807,689	173,750	\$27.67
Logan	\$235,000	45,316	\$5.19
Lorain	\$5,247,000	307,670	\$17.05
Lucas	\$44,424,942	431,102	\$103.05
Mahoning	\$15,765,792	229,961	\$68.56
Medina	\$545,000	177,980	\$3.06

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Miami	\$4,452,741	105,371	\$42.26
Montgomery	\$38,080,449	531,670	\$71.62
Muskingum	\$982,113	86,131	\$11.40
Perry	\$250,000	36,022	\$6.94
Pickaway	\$1,999,999	57,762	\$34.62
Portage	\$2,376,750	162,511	\$14.63
Preble	\$2,000,000	41,093	\$48.67
Richland	\$549,887	121,100	\$4.54
Ross	\$1,410,500	76,948	\$18.33
Scioto	\$1,543,630	76,040	\$20.30
Seneca	\$1,933,536	55,351	\$34.93
Stark	\$25,152,579	372,404	\$67.54
Summit	\$59,883,047	541,334	\$110.62
Trumbull	\$2,409,170	200,367	\$12.02
Van Wert	\$2,500,000	28,261	\$88.46
Warren	\$3,334,250	229,132	\$14.55
Washington	\$2,353,630	60,426	\$38.95
Wayne	\$168,500	116,099	\$1.45



## Appendix C – County Unemployment Rates

This appendix is provided as a reference for C5 – Benefit to Low-Income in County. The December 2021 Unemployment Rate for each Ohio County (not seasonally adjusted) is provided in the table below.

The Ohio Unemployment Rate as of December 2021 was 3.4%.

County	Rate	County	Rate	County	Rate
Adams	4.6	Hamilton	3.0	Noble	5.4
Allen	3.4	Hancock	2.6	Ottawa	5.5
Ashland	3.1	Hardin	3.2	Paulding	2.8
Ashtabula	4.0	Harrison	4.6	Perry	4.0
Athens	3.7	Henry	4.2	Pickaway	3.1
Auglaize	2.4	Highland	4.3	Pike	5.1
Belmont	4.2	Hocking	3.6	Portage	3.2
Brown	3.8	Holmes	2.0	Preble	2.8
Butler	2.9	Huron	4.8	Putnam	2.4
Carroll	3.9	Jackson	4.5	Richland	4.0
Champaign	2.9	Jefferson	4.6	Ross	3.5
Clark	3.3	Knox	2.9	Sandusky	3.4
Clermont	2.8	Lake	3.4	Scioto	4.7
Clinton	3.5	Lawrence	3.5	Seneca	3.3
Columbiana	3.7	Licking	2.7	Shelby	2.8
Coshocton	4.2	Logan	2.9	Stark	3.5
Crawford	4.1	Lorain	3.9	Summit	3.5
Cuyahoga	4.1	Lucas	3.9	Trumbull	4.4
Darke	2.8	Madison	2.5	Tuscarawas	3.3
Defiance	3.1	Mahoning	4.2	Union	2.4
Delaware	2.3	Marion	3.2	Van Wert	2.6
Erie	4.4	Medina	3.0	Vinton	4.6
Fairfield	2.9	Meigs	5.1	Warren	2.6
Fayette	3.0	Mercer	2.1	Washington	4.1
Franklin	2.9	Miami	2.9	Wayne	2.5
Fulton	3.5	Monroe	6.0	Williams	2.9
Gallia	4.2	Montgomery	3.5	Wood	2.8
Geauga	3.0	Morgan	5.3	Wyandot	2.5
Greene	2.7	Morrow	3.3	<b>Source: Ohio Department of Job and Family Services</b>	
Guernsey	4.3	Muskingum	3.8		

## Appendix D – Self-Scoring Summary

This appendix is provided to summarize the 13 competitive scoring criteria utilized to rank applications. After the application is submitted, a summary of the 94 points that can be self-scored will appear.

<b>Criterion A – Regional Distributive Balance</b>		
<b>1. Jurisdictional Balance</b>	0 Projects	8
	1 - 3 Projects	6
	4 - 5 Projects	4
	6 - 8 Projects	3
	More than 8 Projects	2
	<b>Total Possible Points</b>	<b>8</b>
<b>2. County Per Capita Balance</b>	\$0 - \$9.99	7
	\$10 - \$19.99	6
	\$20 - \$29.99	5
	\$30 - \$39.99	3
	More than \$40	2
	<b>Total Possible Points</b>	<b>7</b>
<b>3. Benefit to Low-Income in Jurisdiction</b>	30% or greater poverty	5
	25 - 29.99% poverty	4
	20 - 24.99% poverty	3
	15 - 19.99% poverty	2
	Less than 15% poverty	1
	<b>Total Possible Points</b>	<b>5</b>
<b>4. Benefit to Low-Income in Census Tract</b>	50% or greater poverty	5
	40 - 49.99% poverty	4
	30 - 39.99% poverty	3
	20 - 29.99% poverty	2
	Less than 20% poverty	1
	<b>Total Possible Points</b>	<b>5</b>
<b>5. Benefit to Unemployed in County</b>	Unemployment greater than 2% above Ohio rate	5
	Unemployment 1 - 2% above Ohio rate	4
	Unemployment within 1% of Ohio rate	3
	Unemployment 1 - 2% below Ohio rate	2
	Unemployment greater than 2% below Ohio rate	1
	<b>Total Possible Points</b>	<b>5</b>
<b>Total Regional Distributive Balance Points</b>		<b>30</b>
<b>Criterion B – Potential Economic Impact</b>		
<b>6. Leveraged Investment*</b>	More than 10.0	10
	9.1 to 10.0	9
	8.1 to 9.0	8
	7.1 to 8.0	7
	6.1 to 7.0	6
	5.1 to 6.0	5
	4.1 to 5.0	3
	4.0 or less	1
	<b>Total Possible Points</b>	<b>10</b>
	*In calculating the scores, values will not be rounded.	

<b>7. Financing Committed</b>	100% of financing in place	15	
	90% of financing in place	13	
	80% of financing in place	11	
	70% of financing in place	9	
	60% of financing in place	7	
	50% of financing in place	5	
	40% of financing in place	3	
	Less than 40% of financing in place	1	
	<b>Total Possible Points</b>	<b>15</b>	
<b>8. Affordable Housing</b>	80% to 100% of project sq.ft. affordable housing end use	5	
	60% to 79.99% of project sq.ft. affordable housing end use	4	
	40% to 59.99% of project sq.ft. affordable housing end use	3	
	20% to 39.99% of project sq.ft. affordable housing end use	2	
	More than 0% to 19.99% of project sq.ft. affordable housing end use	1	
	0% of project sq.ft. affordable housing end use	0	
<b>Total Possible Points</b>	<b>5</b>		
<b>9. Physical Scope and Construction Jobs</b>	More than 120,000 sq.ft.	10	
	100,000 - 120,000 sq.ft.	9	
	80,000 - 99,999 sq.ft.	8	
	60,000 - 79,999 sq.ft.	7	
	50,000 - 59,999 sq.ft.	6	
	40,000 - 49,999 sq.ft.	5	
	30,000 - 39,999 sq.ft.	4	
	20,000 - 29,999 sq.ft.	3	
	10,000 - 19,999 sq.ft.	2	
	Less than 10,000 sq.ft.	1	
<b>Total Possible Points</b>	<b>10</b>		
<b>10. Vacant Property</b>	95 - 100% vacant	15	
	85 - 94.99% vacant	13	
	70 - 84.99% vacant	11	
	55 - 69.99% vacant	9	
	40 - 54.99% vacant	7	
	25 - 39.99% vacant	5	
	10 - 24.99% vacant	3	
	Less than 10% vacant	1	
	<b>Total Possible Points</b>	<b>15</b>	
<b>11. Local Participation and Support</b>	Financial Commitment AND Indication of Local Support	5	
	Financial Commitment	3	
	Indication of Local Support	2	
	<b>Total Possible Points</b>	<b>5</b>	
Score sheet continued on next page			



<b>12. Cost-Benefit Analysis and End Use Commitments</b>	100% Leased	4	
	75% to 99.9% Leased	3	
	50% to 74.9% Leased	2	
	25% to 49.9% Leased	1	
	<b>End Use Commitments Total Possible Points</b>	<b>4</b>	
	ROI of 5.0 or more over 10 years	6	
	ROI between 3.0 and 4.99 over 10 years	5	
	ROI between 2.25 and 2.99 over 10 years	4	
	ROI between 1.5 and 2.249 over 10 years	3	
	ROI between 0.75 and 1.49 over 10 years	2	
	ROI greater than 0 and less than 0.75 over 10 years	1	
	ROI of 0 or less	0	
	<b>Cost-Benefit Analysis Total Possible Points</b>	<b>6</b>	
	<b>Total Potential Economic Impact Points</b>		<b>70</b>
<b>Total Possible Points</b>		<b>100</b>	

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## Authorized Representative Declaration Form

This form must be completed and attached to the application prior to final submission.

I hereby attest that the information I have provided in this application is, to the best of my knowledge, correct. I understand that falsification of representations in this application may subject the applicant to criminal sanctions including fines and/or imprisonment pursuant to Section 2921.77 of the Ohio Revised Code and make the applicant ineligible for future state assistance pursuant to Section 9.66 of the Ohio Revised Code.

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Authorized Representative's Signature:

\_\_\_\_\_ Date: \_\_\_\_\_  
(Original Signature only)

Authorized Representative's Name: \_\_\_\_\_

Authorized Representative's Title: \_\_\_\_\_