



# Limited Scope Rehabilitation Sustainability Standards

**A Letter from  
Enterprise Community Partners and the  
Office of Planning, Preservation and Development**

Dear Partners,

The Ohio Housing Finance Agency (OHFA) has long promoted sustainability best practices in the affordable housing industry. The green building certification programs that OHFA supports through the Qualified Allocation Plan and its forthcoming Design & Architectural Standards are holistic, green building programs that, when certification is achieved, ensure our properties are healthy, safe, durable, energy efficient, environmentally responsible, and affordable.

As these programs are holistic, addressing nearly all systems of a property, retrofitting existing properties with modest scopes of work may not qualify under these rigorous standards designed for new construction and extensive rehabilitations. However, these “limited scope” rehabilitations do still present opportunities to improve energy and water efficiency, durability, and to address resident health. Without pre-established criteria to follow, limited scope rehab properties lack sufficient guidance to achieve these impactful cost and energy savings.

With this in mind, Enterprise Green Communities partnered with OHFA to draft a self-certification pathway for limited scope rehab properties to achieve a meaningful and cost-effective level of sustainability as described within this document. Enterprise’s leadership and expertise on this issue is undeniable; their efforts to create this alternate pathway represent a significant milestone in the growth of this architectural discipline.

We thank all those who submitted public comments that shaped the final draft and OHFA looks forward to incorporating this document into our Design & Architectural Standards guide.

Respectfully Submitted,



Kelan Craig  
Ohio Housing Finance Agency  
Director of Planning, Preservation and Development



Krista Egger  
Enterprise Community Partners, Inc., Director,  
Green Communities



Elizabeth Richards  
Enterprise Community Partners, Inc.  
Senior Program Director, Ohio

## Proposal Application

The Eligibility section of this document clarifies which properties should follow this pathway rather than the more comprehensive OHFA Green Standards. The Requirements section of this document describes the mandatory measures for each project. To confirm compliance at the time of project application, project teams will complete the Project Information section of this form, the Requirements chart, provide any additional information within the Project Application: Comments section, and sign and date the Project Application: Compliance Agreement and Certification section. Project teams will include this completed and signed document in their project application for Non-Competitive Housing Tax Credits to OHFA staff.

At the completion of the development the project team will update the form that was submitted upon project application. This update will consist of initialing the far-right column of the Requirements chart to indicate that the item was included in the property as designed, adding comments within the Project Completion: Comments section describing any discrepancies, and signing and dating the Project Completion: Compliance Agreement and Certification section. The project team will submit this form as part of the 8609 form request.

### Eligibility

These Limited Scope Rehabilitation Sustainability Requirements apply to all multifamily and single family rehabilitation projects requesting and receiving Ohio Housing Finance Agency's (OHFA) Non-Competitive Housing Tax Credits that are neither new construction nor a gut rehabilitation. At OHFA's discretion, new construction buildings or buildings undergoing a gut rehabilitation are required to follow the more comprehensive Green Standards as described in the Qualified Allocation Plan (QAP) and/or the Design & Architectural Standards. Applicability of these requirements may be further restricted or modified in OHFA's program guidelines including but not limited to the QAP, the Design & Architectural Standards, and the Consolidated Housing Development Assistance Program guidelines.

### Project Information

Project Name and Location

[Click or tap here to enter text.](#)

Brief Description of Scope of Work

[Click or tap here to enter text.](#)

### Compliance

Development teams should complete a walk-through audit when developing application budgets in order to ensure all requirements can be met. It is the responsibility of the Owner to ensure that all items noted as "Yes" within the Requirements form are incorporated fully into the project by the time of construction completion.

## Requirements

At Project Application:

- If the proposed scope of work includes the item but will not meet the criteria, select “No.”
- If the proposed scope of work includes the item and applicable criteria, select “Yes.”
- If the item is not included in the scope of work, select “N/A.”

At Project Completion, certify that the scope was implemented as designed by including initials in the far right column.

Item & Question	At Project Application, regarding proposed Scope of Work			At Project Completion, initials certifying scope was executed as designed.
	No	Yes	N/A	
<b>Landscaping</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
If being provided, will all new plants be native or adaptive species? Will the new plants be appropriate for the site’s soil and microclimate? Will none of the new plants be invasive species?				
<b>Efficient Irrigation and Water Reuse</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
If a new irrigation system is included, will it be an efficient system (EPA WaterSense) and/or will there be a water reuse system?				
<b>Water Conserving Fixtures</b>	<input type="checkbox"/>	<input type="checkbox"/>		
Will all plumbing fixtures remaining in the property, or being replaced, meet the following max flow rates? [Note: fixtures less than 5 years old which are not scheduled for replacement are exempt from this question, however, provide rationale for not replacing these fixtures, along with the quantity of fixtures and their gpf/gpm spec, in the Comments section]: <input type="checkbox"/> Toilets ≤ 1.28 gpf & WaterSense label <input type="checkbox"/> Urinals ≤ 0.5 gpf & WaterSense label <input type="checkbox"/> Showerheads ≤ 2.0 gpm & WaterSense label <input type="checkbox"/> Kitchen faucets ≤ 2.0 gpm <input type="checkbox"/> Lav faucets ≤ 1.5 gpm & WaterSense label				
<b>Building Performance Standard, HVAC Equipment</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
If any Heating Ventilating and Air Conditioning (HVAC) or water heater system or item is being upgraded or replaced, will it/they meet required efficiencies as described below?				

<input type="checkbox"/> Cooling equipment $\geq$ 13 SEER <input type="checkbox"/> Gas Furnace $\geq$ 95 AFUE (Roof Top 90 AFUE) <input type="checkbox"/> Oil Furnace $\geq$ 85 AFUE, ENERGY STAR <input type="checkbox"/> Boiler $\geq$ 90 AFUE, ENERGY STAR <input type="checkbox"/> Heat Pump shall be ENERGY STAR Qualified <input type="checkbox"/> Gas Water Heater $\geq$ these efficiencies: 30 gal: .63 EF, 40 gal: .61 EF, 50 gal: .59 EF 60 gal: .57 EF, 70 gal: .55 EF, 80 gal: .53 EF <input type="checkbox"/> Electric Water Heater $\geq$ these efficiencies: 30 gal: .94 EF, 40 gal: .93 EF, 50 gal: .92 EF 60 gal: .91 EF, 70 gal: .90 EF, 80 gal: .89 EF <input type="checkbox"/> Oil Water Heater $\geq$ these efficiencies: 30 gal: .55 EF, 40 gal: .53 EF, 50 gal: .51 EF 60 gal: .49 EF, 70 gal: .47 EF, 80 gal: .45 EF				
<b>Building Performance Standard, HVAC Installation</b>	<input type="checkbox"/>	<input type="checkbox"/>		
Will all HVAC systems meet the following requirements?				
<input type="checkbox"/> Hot Water Boiler Space Heating: Outdoor air reset controls installed to automatically adjust supply water temperature <input type="checkbox"/> Exposed Boiler Pipes: Insulated in compliance with ASHRAE 90.1-2010 <input type="checkbox"/> Ductwork carrying conditioned air in pitched roof attics with enough space to allow access are insulated minimum R-Value of R8. <input type="checkbox"/> Domestic hot water boiler and space heating boiler system tune-ups: Completion confirmed within the past 5 years <input type="checkbox"/> Forced air system tune-ups: Completion confirmed within the past 2 years <input type="checkbox"/> Insulated covers provided for existing or new through-wall air conditioner (AC) sleeves. These covers fit the AC sleeves and AC units properly and seal tightly to the wall.				
<b>Sizing of Heating and Cooling Equipment</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
If HVAC equipment is being replaced, rather replacing with previous size, will new equipment be sized in accordance with the Air Conditioning Contractors of America (ACCA) Manuals parts J and S?				
<b>Building Performance Standard, Exterior Wall Insulation</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
For projects with exterior walls with a cavity of $\geq 3.5$ " without existing insulation, will those exterior walls be insulated to capacity, with insulation voids in less than 5% of insulated area?				

<b>Building Performance Standard, Attic Insulation and Air Sealing</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.
<p>In properties with pitched-roof attics with enough space to allow access, will the following insulation and attic bypass air sealing requirements be met? [For properties with pitched-roof attics without enough space to allow access, describe access issues in Comments space below. As a general rule, “enough space” is defined as attics <math>\geq 30</math> ft<sup>2</sup> with a vertical height of <math>\geq 30</math>” and an opening of at least 22”x30”]:</p> <p><input type="checkbox"/> Attics insulated to a minimum code R-Value of R49 in properties as follows: In electrically heated properties with existing insulation less than R39 and in gas-heated properties with existing insulation less than R30. (For existing insulation, follow the BPI Building Analyst Standards and typical insulation R-Value which assumes R-3.7/in for blown cellulose and R-3.0/in for un-faced, unmarked batt installation).</p> <p><input type="checkbox"/> Attic bypasses air sealing in properties when insulation is required to be added. Bypass is defined as any building air leakage pathway between conditioned and unconditioned areas. Attic bypass locations include, but are not limited to chimney chases, combustion/soil stack chases, open wall tops, dropped ceilings, open plumbing walls, beneath knee walls, around ductwork, electrical work and attic access points. Attic bypasses are sealed in such a manner that the movement of air is “Essentially Stopped.” “Essentially Stopped” means that air leakage will not be detected by an infrared scan when the house or dwelling unit is depressurized at 25 Pascals. Materials used for bypass sealing are determined by the size and location of the bypass. These materials include high quality caulking with 20-yr life span, polyethylene rod stock, spray foam, gypsum board, sheet metal, extruded polystyrene insulation, and densely packed insulation.</p>				
<b>Appliances</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
If washers, dishwashers, and/or refrigerators are being provided, are these ENERGY STAR labeled?				
<b>Lighting</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
If new light fixtures are provided, will they have efficacy of at least 40-60 lumens per watt or ENERGY STAR certified? Or will lighting follow the ENERGY STAR MFHR (20% allowed non-compliant) program or consist of all LED lamps?				
<b>Low/No VOC Paints and Primers</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
If provided, will the paints and primers have less than or equal to the following VOC levels in grams per liter based on a combination of the South Coast Air Quality Management District and Green Seal				

standards? Flats ≤ 50 g/L, Non-flats ≤ 50 g/L, Floor ≤ 100 g/L, Primers and sealers ≤ 100 g/L, Clear woods ≤ 275 g/L						
<b>Low/No VOC Adhesives and Sealants</b>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>If new adhesives or sealants are being provided, will they have the following maximum VOC limits (G/L):</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Indoor carpet adhesives of 50</li> <li><input type="checkbox"/> Carpet pad adhesives of 50</li> <li><input type="checkbox"/> Outdoor carpet adhesives of 150</li> <li><input type="checkbox"/> Wood flooring adhesives of 100</li> <li><input type="checkbox"/> Rubber flooring adhesives of 60</li> <li><input type="checkbox"/> Subfloor adhesives of 50</li> <li><input type="checkbox"/> Ceramic tile adhesives of 65</li> <li><input type="checkbox"/> VCT and asphalt tile adhesives of 50</li> <li><input type="checkbox"/> Drywall and panel adhesives of 50</li> <li><input type="checkbox"/> Multipurpose construction adhesives of 70</li> <li><input type="checkbox"/> Structural glazing adhesives of 100</li> </ul>						
<b>Composite Wood Products that Emit Low or No Formaldehyde</b>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If interior composite wood products are included such as cabinetry, plywood, particle board, oriented strand board, or medium density overlay, will the composite wood products be compliant with California 93120, or will all exposed edges be sealed with a low VOC sealant?						
<b>Environmentally Preferable Flooring 1</b>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If new flooring is being provided, will a hard surface material (no carpet) be used at entryways, laundry rooms, bathrooms, kitchens/kitchenettes, and utility rooms?						
<b>Environmentally Preferable Flooring 2</b>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If carpet (including pad and adhesives) is being provided, will it meet the Carpet and Rug Institute's Green Label and Green Label Plus Certification?						
<b>Environmentally Preferable Flooring 3</b>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If hard surface flooring is being provided, will it be ceramic tile or unfinished hardwood? Or will it comply with the Scientific Certification System's FloorScore program?						
<b>Exhaust Fans: Bathroom</b>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If being replaced, will all new bath exhaust fans be ENERGY STAR labeled; exhausted to the outdoors; and connected to a light switch or equipped with a humidistat, timer, or other control?						



<b>Ventilation</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<p>If an abandoned mechanical ventilation system exists, has it been investigated and re-commissioned per the two-step method as follows?</p> <p>1. Identification of cause of failure: either mechanical malfunction (system broken) or human error (maintenance failure, override, or system shut-off).</p> <p>2. Identification of remedy: either restore/replace/repair/re-commission, or require manuals and education for management and maintenance staff, or include tenant education in resident manual and orientation.</p> <p>[Note: If answer is “no” because a decision has been made not to restore the mechanical ventilation system to working order, provide rationale in Comments section]</p>				
<b>Clothes Dryer Exhaust</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<p>If new dryers are being provided or existing dryers are being replaced, will the ventilation be ducted to the exterior with rigid ductwork?</p>				
<b>Combustion Equipment 1</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<p>Will all existing or new gas or oil space or water heating equipment be direct vented (sealed/closed) or power vented? [Check “No” if <b>any</b> remaining or new gas heating equipment has passive venting. Only check “N/A” if there is no gas or oil space heating or water heating equipment.]</p>				
<b>Combustion Equipment 2</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<p>If passive venting combustion equipment is to remain, has the development team developed a combustion action plan that includes post-construction testing and a remediation plan in the event testing reveals unsafe CO levels? Combustion Safety Requirements / Testing Protocols must be per RESNET Guidelines for Combustion Safety and Development Work Orders, or, BPI Combustion Safety Test Procedure for Vented Appliances.</p>				
<b>Operations &amp; Maintenance Guidelines</b>	<input type="checkbox"/>	<input type="checkbox"/>		
<p>By time of project completion, will the project have written operations and maintenance guidelines, which include inspection, replacement, and turnover guidance relevant to each of the above sections in this document? And have shared this document with OHFA at time of project completion? Templates available <a href="#">here</a>.</p>				



## Project Application: Comments

If “No” is selected for any of the Items above, provide an explanation here. Also, if not replacing water fixtures, share your rationale, along with the quantity of fixtures in the project and their gpf/gpm spec, here.

On a case-by-case basis, OHFA may approve project applications which have marked items as “No” in the Requirements table, if reasonable rationale as well as cost/benefit information for these Items has been provided in Comments that shows  $\geq 10$  year payback. Note that many of the Requirements do not have cost implications for a project and a selection of “No” for those items will not be approved.

[Click or tap here to enter text.](#)

## Project Application: Compliance Agreement and Certification

Sign as Owner, agreeing to comply with requirements as noted throughout this document.

By execution of this form, signee and its duly authorized officers, partners, or members hereby certifies that the information contained in this document is true, correct, and complete; and that the execution and delivery of this project will meet requirement noted in this document.

Name of Organization	<a href="#">Click or tap here to enter text.</a>
Authorized Signature	_____
Printed Name	<a href="#">Click or tap here to enter text.</a>
Title	<a href="#">Click or tap here to enter text.</a>
Date	<a href="#">Click or tap here to enter text.</a>

## Project Completion

At the completion of the development, update the form that was submitted upon project application. This update will consist of initialing the far-right column of the REQUIREMENTS chart to indicate that the item was included in the property as designed, adding comments within the PROJECT COMPLETION: COMMENTS section describing any discrepancies, and signing and dating the PROJECT COMPLETION: COMPLIANCE AGREEMENT AND CERTIFICATION section. Submit this form as part of the 8609 form request.

## Project Completion: Comments

If the project representative is not able to initial in the far right column for any item, given that the item was not implemented as designed, provide an explanation here.

[Click or tap here to enter text.](#)

## Project Completion: Compliance Agreement and Certification

Sign as Owner, certifying that the scope as proposed on this document was implemented in full.

By execution of this form, signee and its duly authorized officers, partners, or members hereby certifies that the information contained in this document is true, correct, and complete; and that the execution and delivery of this project has met the requirements noted in this document.

Operations & Maintenance Guidelines are attached.

Name of Organization [Click or tap here to enter text.](#)

Authorized Signature

Printed Name

Title

Date

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)

[Click or tap here to enter text.](#)