IOWA FINANCE AUTHORITY

APPENDIX LIST

Appendix	Description
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L	Density
M	Supportive Housing for Families Set-Aside Requirements & Scoring

APPENDIX A

APPLICATION INSTRUCTIONS

A. General Overview of 2019 Funding Round Pre-Application and Application

1) The 2019 funding round has a two-stage on-line Application process: Pre-Application and threshold Application.
2) Developers planning to submit a Tax Credit Application in the 2019 funding round must submit a Pre-Application to IFA through the on-line Application on November 1, 2018, 4:30 p.m. C.S.T.
   - The Pre-Application shall help determine market feasibility for each proposed project's Pre-Application submission.
   - Payment of the market study fee shall be made at Pre-Application submission.
   - The market study report shall be available through the Overview tab of the Application.
   - Each Developer shall be responsible for reviewing the market study report and making the required changes to the threshold Application prior to submission to IFA.
3) Applicants for Low-Income Housing Tax Credits under the 2019 Housing Tax Credit funding round will be required to submit a complete Application through the online Application between January 14, 2019 and 4:30 p.m. C.S.T. on January 16, 2019.
   - Payment of the application fee is required at submission of the threshold Application.

B. The On-line Pre-application

1) The on-line Application is available on the 2019 LIHTC webpage at the following link: 2019 LIHTC webpage.
2) Only registered and approved users may access the on-line Application.
3) Log into the on-line Application.
4) Select "Create new 9% Application" or "Create new Supportive Housing for Families Application".
   - All tabs of the 2019 on-line Application "Application" will appear.
5) Enter required Pre-Application information and upload required Pre-Application exhibits. The Pre-Application consists of eight (8) tabs ("Pre- Application"). Refer to the 2019 On-line Application Training Guide for specific instructions.

   On the Tabs listed below, enter the following information:

   a) Project Name and Location:
      - Project Name and Political Jurisdiction name (contact information not required in the Pre-Application)

   b) Project Description:
      - Project Type;
      - Minimum Set-Aside election;
      - Occupancy Type;
      - Location Near Services;
      - Other Elections; and
      - Rental Assistance

   c) Site Description:
      - Enter information on the current use of the property, adjacent property land uses, and surrounding neighborhood;
      - Location and Site Requirements;
      - Access to Utilities and Paved Roads;
      - Site Characteristics; and
      - Zoning

   d) Ownership Entity:
      - Company name, address, city, state, zip and contact information

   e) Qualified Development Team:
      - Add new Team Member;
      - Team Member Type – Developer or Co-Developer; and
      - Address, city, state, zip, phone, email and contact information

   f) Project Amenities:
      - Complete the entire tab

g) Buildings:
- Add New Building(s);
- For each building entered:
  - ✓Primary Address;
  - ✓Address, street, city and 9-digit zip code;
  - ✓Small Area DDA – zcta (Yes or No);
  - ✓Prior LIHTC section;
  - ✓New or Acquired;
  - ✓If Acquired- enter date constructed and date Placed-in-Service by Previous Owner, if applicable;
  - ✓Number of stories;
  - ✓Building Type;
  - ✓Expected Placed-in-Service Date;
  - ✓Number of Fully Accessible, Accessible Type A Units and Units with Communication Features;
  - ✓Answer question on the heating/cooling/water heating in each Unit;
  - ✓If building common space only, check the box;
  - ✓If Project has Federal Project-Based Rental Assistance, select extend rent limit and enter the Contract Number;
  - ✓Utilities Included in Rent;
  - ✓Tenant Paid Utilities;
  - ✓Mandatory Charges;
  - ✓Sub-metering;
  - ✓Building includes section;
  - ✓Main entrance area;
  - ✓Square Footage; and
  - ✓All Unit information

h) Exhibits – upload the following:
- Exhibit 11T – Utility Allowance Documentation;
- Exhibit 12T – Market Study Documentation (Optional);
- Exhibit 3B – Color Photos of Project and Adjacent Property;
- Exhibit 4B – Maps; and
- Exhibit 5B – Site and Floor Plans

6) Completion of Application tabs, that are not required tabs for the Pre-Application, is optional through submission of the Pre-Application.
- Red x's will remain on any tab that is not required for the Pre-Application; however, these red x's will not prevent submission of the Pre-Application to IFA.

7) Select "Submit".
- Error messages will display specifically and solely for the (8) Pre-Application tabs.
- Once the Pre-Application is submitted to IFA, the status of the Application becomes Threshold InWork.

8) The Developer shall receive an email when the market study report is available in the Overview Tab of the Application (on or about December 14, 2018).
- Each Developer is responsible for reviewing the market study report and making the market study required changes to the Application.

C. The On-line Application

1) Complete entries in all Application tabs and upload required exhibits in the threshold Application.
- All market study recommended changes shall be made in the Application prior to submission of the complete threshold Application.

2) Select "Submit".
- Error messages will display for all tabs.
- If no errors, proceed with the Application fee payment and submission of the threshold Application to IFA.

3) Per Section 3.2.2 – After Application Submittal of the 2019 QAP, once the Application is received by IFA an Applicant shall not contact any IFA staff or Board members, nor shall anyone contact IFA staff or Board members on the Applicant's behalf, in order to unduly influence IFA's determination related to the award of Tax Credits. If it has been determined by IFA that a staff member or Board member has been improperly contacted by the Applicant or a party on behalf of the Applicant, then the Application shall be withdrawn by IFA from consideration for LIHTC. The only exception is when IFA contacts an Applicant to clarify a threshold item within the Application.

4) Once the threshold Application is submitted to IFA, it shall be unavailable to the Applicant until such time that the Applicant needs to make a change per IFA's request. The Application will then be available to the Applicant to make only IFA requested changes during the threshold deficiency review period.
5) An email notification is sent to the Owner Contact(s) when the deficiency report in the Threshold Deficiency InWork Application is available for review and response. The Applicant shall respond in the Deficiency Report and make corrections within the appropriate Application tabs as requested.
6) A change in funding sources, including equity pricing, shall not be allowed during the deficiency period, unless requested by IFA.

D. Nonprofit and Supportive Housing for Families Set-Aside Submissions

1) Projects requesting the Nonprofit Set-Aside shall submit the nonprofit entity approval request for each Project on the Nonprofit Set-Aside tab in each Application no later than 4:30 p.m. C.S.T. on November 30, 2018. Refer to QAP Section 2.2.1 – Nonprofit Set-Aside and 2019 Appendix K.
2) Projects applying for the Supportive Housing for Families Set-Aside shall submit the qualified service provider request for each Project on the 2HSA tab in each Application no later than 4:30 p.m. C.S.T. on November 30, 2018. Refer to QAP Section 2.2.2 -- Supportive Housing for Families Set-Aside and 2019 Appendices K – Exhibit & Scoring Checklist and M -- Supportive Housing for Families Set-Aside.

E. Scoring

1) Changes to the Application shall not be allowed that maintain or improve the preliminary score received by an Applicant.
2) IFA will make the final scoring determination of each Application per QAP Section 6 – Scoring Criteria.

****REMINDER:*** *Per QAP Section 9.2 – Binding Obligations, "The representations made in the Application shall bind the Applicant and shall become a contractual obligation of the Developer and the Ownership Entity and any Entity the Developer or the Ownership Entity is representing in the presentation of the Application or a successor in interest in the event Tax Credits are awarded to a proposed Project."*

APPENDIX B

IOWA FINANCE AUTHORITY

2019 LIHTC QUALIFIED CENSUS TRACTS (QCTs), DIFFICULT DEVELOPMENT AREAS (DDAs), AND METROPOLITAN STATISTICAL AREAS (MSAs)

Effective 1-1-2019

A. QCT & DDA CHANGES FROM 2018

MSA	County	QCT Additions	QCT Deletions
Cedar Rapids	Linn	26.00	30.02
Council Bluffs	Pottawattamie	304.02	
Davenport	Scott		113
Des Moines – West Des Moines	Polk		3.00, 18.00, 29.00, 42.00
Iowa City	Johnson	17.00	4.00
Waterloo – Cedar Falls	Black Hawk		9.00
Sioux City	Woodbury	10.00	

Non MSA	QCT Additions	QCT Deletions
Appanoose County	9503	
Clinton County		2.00
Davis County		802.00
Des Moines County	5.00	
Floyd County	4804	
Lucas County		9504.00
Mahaska County		9506.00, 9507.00

MSA	County	DDA Addition	DDA Deletion
Dubuque	Dubuque		52073

B. METROPOLITAN STATISTICAL AREAS (9) WITH COUNTY

Ames (Story)
Cedar Rapids (Linn, Benton, Jones)
Davenport (Scott)
Des Moines-West Des Moines
(Dallas, Guthrie, Madison, Polk, Warren)
Dubuque (Dubuque)
Iowa City (Johnson, Washington)
Council Bluffs (Pottawattamie, Harrison)
Waterloo-Cedar Falls
(Bremer, Black Hawk, Grundy)
Sioux City (Plymouth, Woodbury)

C. METRO QCTs

Ames MSA
Story County
5.00, 7.00, 10.00, 11.00

Cedar Rapids MSA
Linn County
10.03, 19.00, 22.00, 26.00, 27.00

Council Bluffs MSA
Pottawattamie County
306.02, 307.00, 309.00, 304.02

Davenport MSA
Scott County
106,107,108,109, 110,112, 114, 123,126.02

Des Moines-West Des Moines MSA
Polk County
1.01, 7.01, 11.00, 12.00, 17.00, 21.00, 26.00, 27.00, 28.00, 39.01, 40.01, 44.00, 46.02, 47.02, 48.00, 49.00, 50.00, 51.00, 52.00

Dubuque MSA
Dubuque County
1.00, 5.00, 7.01

Waterloo-Cedar Falls MSA
Black Hawk County
1.00, 2.00, 3.00, 5.00, 7.00, 17.01, 18.00, 23.03, 23.04, 40.00 – Bremer County

Iowa City MSA
Johnson County
6.00, 11.00, 16.00, 17.00, 21.00, 23.00

Sioux City MSA
Woodbury County
10.00, 11.00, 12.00, 13.00, 14.00, 15.00, 36.00

IOWA FINANCE AUTHORITY

D. NON-METROPOLITAN STATISTICAL AREAS - QCT

Appanoose County
9503

Clinton County
1.00
3.00

Crawford County
704.00

Des Moines County
3.00
4.00
5.00

Floyd County
4804

Lee County
4908.00
4909.00

Marshall County
9505.00

Montgomery County
9603.00

Page County
4902.00

Wapello County
9602.00
9605.00
9609.00

Webster County
3.00
4.00
5.00
7.00
9.00

E. METROPOLITAN DIFFICULT DEVELOPMENT AREAS (DDAs)

Des Moines – West Des Moines, IA MSA
DDA ZCTA - 50323

APPENDIX C

USEFUL LINKS

265 Iowa Administrative Code

Asset Management Portal

Density link

DNR - Flood Plain Mapping

FEMA Flood Map Service Center

Google Maps

HERS Raters - State of Iowa
Main RESNET Home Page to find HERS Raters outside of Iowa
click "Find a Professional" and search by State

Iowa Economic Development Authority (State Historic Tax Credits)

Iowa Flood Mitigation Board Reports

Iowa Great Places

Iowa Housing Search

IRS Form 8821 (Tax Information Authorization)

MSA link

PHA Listings

Qualified Census Tracts/Difficult Development Areas

Radon Control Methods – 2012 International Residential Code

Small QCTs & DDAs

Tax Credit Rents and Tax Credit Income Link

APPENDIX D

IOWA OPPORTUNITY INDEX CENSUS TRACTS

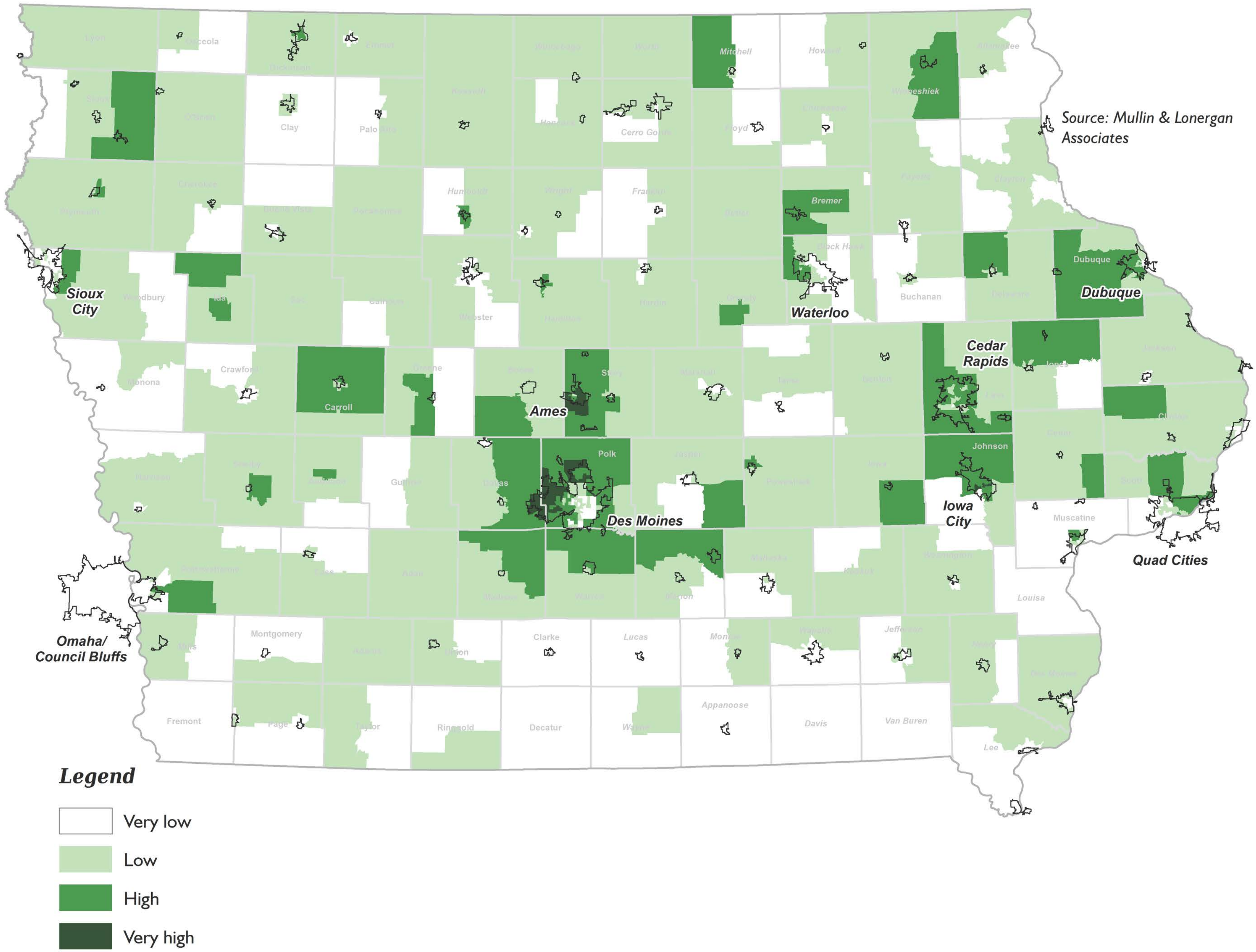
The “high” and “very high” opportunity areas were calculated as part of the State of Iowa’s Analysis of Impediments to Fair Housing Choice. IFA and IEDA are required to conduct such an analysis because both agencies administer HUD funding. One of the components of the Analysis is to identify Opportunity Areas.

HUD adapted the Communities of Opportunity model to calculate opportunity index scores for each census block group on six separate dimensions. Each dimension analyzed for Iowa’s Analysis of Impediments to Fair Housing Choice includes a collection of variables describing conditions for each census tract in the State.

- **Prosperity** includes rates of family poverty and the receipt of public assistance (cash welfare, such as Temporary Assistance to Needy Families) to capture the magnitude of a given neighbor-hood’s rate of poverty.
- **Labor Market Engagement** measures the level of employment, labor force participation, and educational attainment in each neighborhood to describe its local human capital.
- **Job Access** gives each census tract a score based on distance to all job locations, weighting larger employment centers more heavily. The distance from any single job location is positively weighted by the number of job opportunities at that location and inversely weighted by the labor supply (competition) of the location.
- **Mobility** was calculated based on commute times and the percent of people who travel to work via public transit.
- **School Proficiency** uses the results of the Adequate Yearly Progress (AYP) test by elementary, middle, and high school students as a proxy for educational quality. Rates of proficient scores for all grades for both the reading and math exams are combined into one overall score for each school district.
- **Community Health** for a given tract was calculated as a function of the number of residents without health insurance and low food access ranking by the USDA.

The objective of pinpointing Opportunity Areas is to identify places that are good locations for investment that may not have been selected based on other criteria. This identification allows for balanced investment across neighborhoods that offer opportunities and advantages for families.

Comprehensive Opportunity Index, 2012



42

Communities of Opportunity

"Very high" Tracts

Rank	Very High

Row Labels
Dallas County
Census Tract 508.03
Census Tract 508.05
Census Tract 508.07
Census Tract 508.09
Census Tract 508.11
Johnson County
Census Tract 11
Census Tract 12
Census Tract 13
Census Tract 16
Census Tract 5
Census Tract 6
Polk County
Census Tract 102.03
Census Tract 102.12
Census Tract 104.04
Census Tract 104.06
Census Tract 104.07
Census Tract 104.08
Census Tract 104.09
Census Tract 110.21
Census Tract 110.25
Census Tract 110.26
Census Tract 111.11
Census Tract 111.12
Census Tract 111.13
Census Tract 112.03
Census Tract 112.06
Census Tract 113
Census Tract 117.01
Census Tract 117.02
Story County
Census Tract 10
Census Tract 12
Census Tract 13.01
Census Tract 13.02
Census Tract 2
Census Tract 3
Census Tract 4
Census Tract 5

"High" Tracts

Rank	High

Row Labels
Audubon County
Census Tract 702
Black Hawk County
Census Tract 23.01
Census Tract 23.04
Census Tract 24
Census Tract 25
Census Tract 26.01
Census Tract 26.03
Boone County
Census Tract 206
Bremer County
Census Tract 40
Census Tract 41
Census Tract 42
Census Tract 44
Census Tract 46
Carroll County
Census Tract 9601
Census Tract 9602
Census Tract 9603
Cedar County
Census Tract 4504
Clinton County
Census Tract 11
Dallas County
Census Tract 501
Census Tract 502
Census Tract 508.12
Census Tract 509.01
Census Tract 509.02
Delaware County
Census Tract 9502
Dickinson County
Census Tract 4505
Dubuque County
Census Tract 101.01
Census Tract 101.04
Census Tract 102.01
Census Tract 102.02
Census Tract 103

Census Tract 6	Census Tract 104
Census Tract 9	Census Tract 105
	Census Tract 11.01
	Census Tract 11.02
	Census Tract 12.01
	Census Tract 12.02
	Census Tract 12.04
	Census Tract 12.05
	Census Tract 7.01
	Census Tract 8.01
	Census Tract 8.02
	Greene County
	Census Tract 803
	Grundy County
	Census Tract 9603
	Hamilton County
	Census Tract 9603
	Humboldt County
	Census Tract 9703
	Census Tract 9704
	Ida County
	Census Tract 901
	Census Tract 903
	Iowa County
	Census Tract 9604
	Jasper County
	Census Tract 409
	Johnson County
	Census Tract 1
	Census Tract 101
	Census Tract 102
	Census Tract 103.01
	Census Tract 103.02
	Census Tract 14
	Census Tract 15
	Census Tract 17
	Census Tract 18.01
	Census Tract 18.02
	Census Tract 2
	Census Tract 21
	Census Tract 23
	Census Tract 3.01
	Census Tract 3.02
	Census Tract 4
	Jones County
	Census Tract 701
	Census Tract 706

Linn County
Census Tract 1
Census Tract 10.01
Census Tract 102
Census Tract 106
Census Tract 107
Census Tract 108
Census Tract 11.01
Census Tract 11.02
Census Tract 14
Census Tract 15
Census Tract 16
Census Tract 17
Census Tract 19
Census Tract 2.03
Census Tract 2.05
Census Tract 2.06
Census Tract 2.07
Census Tract 27
Census Tract 29
Census Tract 30.01
Census Tract 30.02
Census Tract 4
Census Tract 5
Census Tract 6
Census Tract 7
Census Tract 8
Census Tract 9.02
Madison County
Census Tract 601
Marion County
Census Tract 301
Census Tract 302
Census Tract 303
Mitchell County
Census Tract 5602
Muscatine County
Census Tract 506
Plymouth County
Census Tract 9701
Polk County
Census Tract 101.01
Census Tract 101.02
Census Tract 102.05
Census Tract 102.07
Census Tract 102.08
Census Tract 102.09

Census Tract 102.11
Census Tract 104.05
Census Tract 106
Census Tract 107.03
Census Tract 107.05
Census Tract 107.06
Census Tract 108.02
Census Tract 108.04
Census Tract 110.01
Census Tract 110.27
Census Tract 110.28
Census Tract 111.14
Census Tract 112.01
Census Tract 112.05
Census Tract 114.04
Census Tract 115
Census Tract 26
Census Tract 27
Census Tract 28
Census Tract 29
Census Tract 30.01
Census Tract 30.02
Census Tract 31
Census Tract 32
Census Tract 40.01
Census Tract 40.04
Census Tract 41
Census Tract 45.02
Census Tract 46.03
Census Tract 7.02
Census Tract 7.03
Census Tract 8.01
Census Tract 8.02
Census Tract 9.02
Pottawattamie County
Census Tract 216.02
Census Tract 316.01
Poweshiek County
Census Tract 3703
Scott County
Census Tract 101.02
Census Tract 102.01
Census Tract 102.02
Census Tract 129.01
Census Tract 129.02
Census Tract 132
Census Tract 135

Census Tract 136
Census Tract 137.02
Census Tract 137.03
Census Tract 137.05
Census Tract 137.06
Shelby County
Census Tract 9604
Sioux County
Census Tract 701
Census Tract 705
Census Tract 706
Story County
Census Tract 1
Census Tract 101
Census Tract 103
Census Tract 106
Census Tract 11
Census Tract 7
Warren County
Census Tract 201
Census Tract 202
Census Tract 203
Census Tract 204
Census Tract 205
Census Tract 206
Census Tract 207
Census Tract 208
Census Tract 210
Winneshiek County
Census Tract 9502
Census Tract 9503
Census Tract 9504
Woodbury County
Census Tract 33

Appendix E

Housing Tax Credit Signage Requirements

All developments that receive an allocation of Housing Tax Credits are required to produce and display a sign during the project's construction period.

IFA provides the electronic art files and sign specifications for developers to send to the sign company/printer of their choice. Developers may choose the horizontal or vertical sign option for projects receiving IFA Housing Tax Credits. There are two file formats (vector-based EPS and PDF). The files have been created to the exact dimensions, are high resolution (300 dpi) and zipped for downloading. The files can be downloaded by clicking on the thumbnails to the right.

Sign specifications are:

Board materials:
3/4 Plywood A-B Ext. APA

Size:
60" x 48" (.125" bleed on all sides, if necessary)

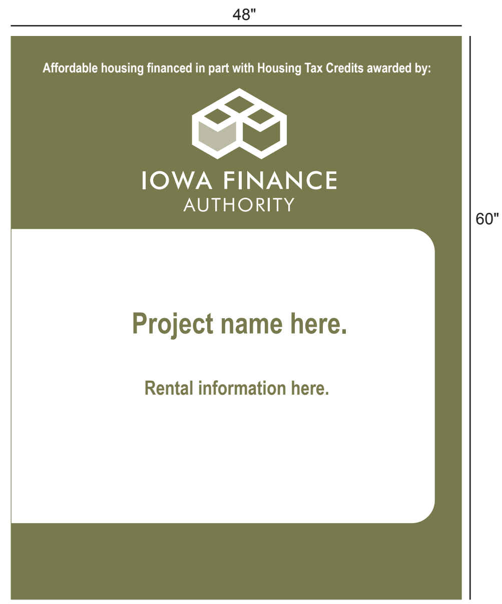
Color:
Pantone 5763 (4C Separation: 16c, 0m, 74y, 57k)

Font usage:
There are only two areas of text that are editable on the electronic files. All other text is set in place and cannot be edited.

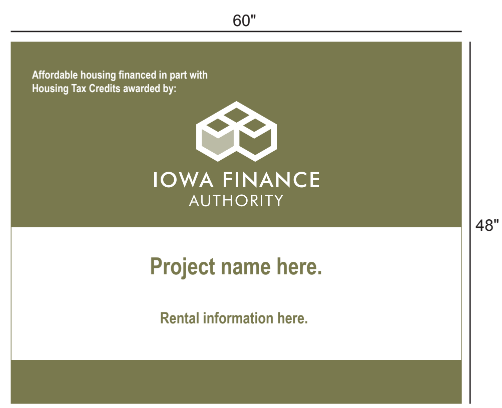
1) Project name—Arial Narrow bold, minimum font size 225pt, Pantone 5763

2) Rental information—Arial Narrow bold, minimum font size 150 pt, Pantone 5763.

Vertical



Horizontal



APPENDIX G

REQUIREMENTS OF THE IOWA ROSE PROGRAM

SECTION 1. INTRODUCTION

The Iowa Renter to Ownership Savings Equity (ROSE) Program ("Program") is only for low-income tenants which are qualified under the LIHTC Program. The Owner shall elect the 40/60 minimum set-aside for IRS elections and rent all Units at sixty percent (60%) or below AMI. This Program cannot be used in conjunction with State HOME Program funds. The Program has been established as an incubator to help tenants chosen for the Program ("Qualified Tenants"), move into homeownership. Qualified Tenants will have the opportunity to buy their home of choice after the initial lease period or to purchase the Qualified Tenant's rental unit in the project at the end of the 15 year compliance period ("Compliance Period"), pursuant to IRC 42(h)(8)(1).

The Program Owner will rent single-family homes located within a project to persons interested in first-time homeownership under the Iowa ROSE. A desire for homeownership and a demonstrated willingness to address obstacles in obtaining and owning a home will be the focus of tenant selection and the services offered to the tenant, as outlined below. The Program is intended to help Qualified Tenants gain knowledge, training and savings to assist with home purchases.

SECTION 2. PROGRAM REQUIREMENTS

A. The Owner shall adopt and present an Iowa ROSE homeownership plan, ("Plan") in its Low Income Housing Tax Credit ("LIHTC") Allocation Application package. The Plan must demonstrate how the project will meet Program requirements and detail how the purchase price will be determined, including but not limited to the Qualified Tenant's monthly anticipated mortgage payment and tenant-paid utilities at the end of the Compliance Period. When the project is awarded tax credits the Plan will be included as an attachment to the Land Use Restrictive Covenants Agreement ("LURA").

B. Only detached single family homes, without an existing LURA, qualify for the ROSE program.

C. The Owner shall elect the 40/60 minimum set-aside for IRS elections and rent all Units at sixty percent (60%) or below AMI.

D. All Unit rents shall be sixty percent (60%) AMI LIHTC Units. The Project shall be one hundred percent (100%) LIHTC.

E. All utilities shall be paid by the tenant.

F. The Owner will screen applicants per its tenant selection criteria and select tenants in conformity with the requirements of the LIHTC and ROSE Programs.

G. The Owner shall provide a prospective tenant a copy of Appendix G, "*Requirements of the Iowa ROSE Program*". An acknowledgement of receipt will be obtained from an applicant accepted as a Qualified Tenant and maintained in the Qualified Tenant's lease file.

H. The Owner shall offer at no cost to Qualified Tenants personal homeownership counseling sessions with a housing counselor and document the date, time, place and content of these sessions. A housing counselor shall be an Iowa licensed residential insurance agent, real estate agent, personal financial planner, residential banker or accountant. Sessions should include but are not limited to helping a Qualified Tenant:
   1. Establish objectives in obtaining homeownership;
   2. Review progress;
   3. Identify areas of needed improvement; and
   4. Create a timetable to complete objectives.

APPENDIX G

I. The Owner shall offer at no cost to tenants semi-annual property maintenance workshops and document the date, time, place and content of these workshops. Workshops should include but are not limited to helping a tenant:
   1. Become familiar with electrical, heating and plumbing systems;
   2. Address problems identified in maintenance inspections;
   3. Recognize and teach seasonal preventative maintenance; and
   4. Develop home maintenance skills.

J. Program Savings Account: In years 1 through 15 of the ROSE Program the Owner shall contribute a minimum of $50 of the tenants monthly rent to a ROSE Program Savings Account ("Program Savings"). Should a tenant vacate the Unit, the accumulated balance in the Program Savings allocated to this tenant shall be returned to such tenant. Interest earned on the account shall go to the tenant. The Program Savings is not a rental or security deposit. The landlord shall return savings to the tenant within 30 days from the date of termination of the tenancy.

K. Owners shall provide a plan to sell the house to an existing LIHTC tenant at the end of the Compliance Period. At the completion of the Compliance Period, the Unit shall be offered to the current tenant in accordance with Internal Revenue Code 42(i)(7), the Owner's Iowa ROSE updated and approved homeownership plan and the requirements of the Iowa ROSE Program, Appendix G.

L. The Owner shall provide a lease that specifies:

   1. A Qualified Tenant shall be delivered notice of right of first refusal to purchase said Qualified Tenant's rental unit ("Right of First Refusal") six months before the end of the Compliance Period (15^{th} year in the LIHTC Program); and
   2. A Qualified Tenant shall have the opportunity to participate in the Iowa ROSE Program and the Owner will deposit a Contribution (amount of Contribution) on behalf of the tenants; and
   3. The Owner shall provide quarterly personal housing counseling sessions and semi-annual home maintenance workshops in which the tenants shall be encouraged to participate. Program Savings cannot be withheld from a Qualified Tenant for lack of attendance or non-participation in counseling or maintenance offerings; and
   4. Program Savings will be distributed prior to move-out if homeownership is attained. Program Savings will be directly paid to the Qualified Tenant's lending institution or closing settlement agent on behalf of the Qualified Tenant in obtaining homeownership. Evidence of purchase is required to release funds prior to the end of tenancy and this evidence must be documented in the tenant file; or
   5. A tenant has the right to be refunded Program Saving after tenancy ends. Program Savings will be returned within 30 days from the date of termination of the tenancy with receipt of the tenant's mailing address or delivery instructions for return. Documentation of the amount and date of return of the funds should be kept with the tenant file in accordance with file retention requirements.

M. The Owner shall include with its annual compliance submission, the following:

   1. A record of all monthly Program Savings deposits, distributions and a copy of the last bank statement for the year reported.
   2. Documentation of the Program Savings account contributions, withdrawals and distributions must be available during compliance reviews or as requested by IFA at its discretion.

N. The Owner shall deliver by certified mail, return receipt requested, to a Qualified Tenant at least six months before, but no earlier than seven months before, the end of the Compliance Period, an enforceable written offer of Right of First Refusal. A Qualified Tenant shall have six months after such notice to accept or reject the offer and at least six months after the end of the Compliance Period to close on the Qualified Tenant's unit.

O. The Owner shall not request a Qualified Contract pursuant to IRC 42 (h)(6)(F) until all Qualified Tenants have purchased and closed on their respective units, or have not timely exercised their Rights of First Refusal.

1. If a Qualified Contract is not requested, any units not sold to tenants will remain as rental units in the LIHTC Program beyond the Compliance Period, an additional 15 years (the “Extended Use Period”).
2. After all Qualified Tenants who elect to do so have exercised their Right of First Refusal and have closed on their respective units, the Owner can request a Qualified Contract for any remaining units pursuant to the Code and the Iowa Finance Authority processing requirements.
3. If a Qualified Contract is approved, the Section 42 rent requirements in favor of the existing tenants shall continue for a period of three years following the termination of the Extended Use Period.

P. The Owner shall have a Capital Needs Assessment performed for the project by a third-party contractor and make improvements as needed prior to offering the units for sale to the Qualified Tenants. Any replacement reserves available will be used to make improvements. If the reserves are not sufficient, the Owner will provide other sources of funds to make the needed repairs. The Owner may retain any security deposit for tenant damages in accordance with state law.

Q. Before the Right of First Refusal is extended to the Qualified Tenants, the Owner shall provide IFA, for its approval, an updated initial Plan or a replacement Plan illustrating how the purchase price is being determined for each unit and attaching current market evidence of the Qualified Tenants’ monthly anticipated mortgage payments and tenant-paid utilities. This updated or replacement Plan must be submitted to IFA by the end of the first month in year 15 of the Compliance Period, to allow IFA time to review and approve the updated or replacement Plan. This homeownership commitment must remain true to the tax credit program by ensuring that the opportunity for homeownership is directed at low-income households at an affordable price.

R. The Owner shall be responsible for all project building and grounds maintenance, including the supplies and labor incident to such maintenance.

S. During the Compliance Period the Owner shall provide Qualified Tenants with quarterly homeownership bulletins, that shall address topics such as:
1. Homeownership programs and opportunities;
2. Home purchase financing options;
3. Home maintenance and landscaping techniques;
4. Successful homeowner profiles;
5. News from neighborhood organizations; and
6. Budget and consumer tips.

APPENDIX G

The Tenant Acknowledgment and Understanding of the Iowa ROSE Program Requirements

Acknowledgment and understanding with respect to the Iowa ROSE Program is entered into by and between Owner and Qualified Tenant(s) listed below. A "Qualified Tenant" is the Head of Household and/or Co-Head of Household.

Owner Entity Name: _____
Owner Name: _____
Authorized Agent
for the Owner: _____
Name: _____
Title: _____

___________________________________ _____
Signature of Owner or Authorized Agent DATE

If an accommodation for a disability is needed, an accommodation request should be submitted in writing to the Owner. (If an accommodation request is provided orally, the Owner must document the request in writing, including the person making the request, what accommodation was requested, and date of the request).

By Qualified Tenant(s):

___________________________________ _____
DATE

___________________________________ _____
DATE

___________________________________ _____
DATE

A copy of this fully executed Acknowledgment and Understanding shall be kept in the tenant file.

APPENDIX G

The Owner/GP Acknowledgment and Understanding of the Iowa ROSE Program Requirements 2019 Round Application

Acknowledgment and understanding with respect to the Iowa Finance Authority's Iowa ROSE Program is entered into by the Owner and General Partner at the time of application for Low Income Housing Tax Credits.

Project Name:
Owner Entity Name:

Signature of Authorized Representative of the Owner Entity DATE

Signature of Authorized Representative of the General Partner/Managing Member DATE

The Owner shall upload a copy of the Iowa ROSE Homeownership Plan and a signed copy of this Acknowledgment of Understanding under 2S of the on-line Application.

APPENDIX H
ENERGY EFFICIENCY

Appendix 1 of the 2019 Qualified Allocation Plan establishes the minimum construction characteristics for all Tax Credit Applicants. Section G-3.2, provides the minimum construction requirements for Energy Efficiency. Each awarded Applicant is responsible for uploading all required energy efficiency documentation to the Application under the Construction Tab

1. <u>Existing Structures:</u>

An energy audit conducted by a certified home energy rater or firm specializing in energy efficiency that is acceptable to IFA, shall be provided on each building prior to the preparation of the final work rehabilitation order. Prior to the start of construction, IFA requires an engineer or architect to certify that the architect has met and coordinated the design with the energy consultant and owner and that the design meets the 2015 IECC, and any additional scoring elections made. The review shall be documented with a letter from the engineer or architect to IFA indicating whether the proposed construction meets the IECC. The contract for the determination of the energy audit shall be between the certified rater and the Ownership Entity. If upon completion, a Project does not verify that the Project has met the specified energy improvements, additional steps shall be taken by the Ownership Entity prior to the issuance of the IRS Form 8609.

2. <u>New construction developments with three stories of residential space or less and buildings with four or five stories above-grade (wherein each Unit has its own heating, cooling and hot water systems, separate from other Units) and where dwelling units occupy 80% or more of the occupiable square footage of the building:</u>

In addition to meeting Iowa State Code and the IECC, the Project shall meet or exceed Energy Star 3.0 prescriptive standards and receive a Home Energy Rating Systems (HERS) Index of 70 or less from a certified rater in Iowa. A home energy rating performed by a Certified HERS rater is required on each building after it is completed to verify that actual construction meets the above listed requirements. Five (5) Units with different floor plans and orientations for complexes of less than 50 Units and ten percent (10%) of Units up to a maximum often 10 Units in complexes of 50 or more Units shall be rated. The contract for the determination of the HERS Index shall be between the certified rater and the Ownership Entity. If upon completion, a Project doesn’t meet the HERS Index of 70 or less, additional steps must be taken by the Ownership Entity to obtain the HERS Index of 70 prior to issuance of the IRS Form 8609. If the Applicant elected scoring points for a lower HERS Index, that requirement shall be met prior to the issuance of the IRS Form 8609.

3. <u>New construction developments with four stories or more without each Unit having its own heating, A/C and water heating</u>

ANSI/ASHRAE/IES Standard 90.1-2010 shall be met. Supporting documentation shall be provided by an independent licensed engineering firm not involved in the project design, manufacture, or installation.. If upon completion, a Project doesn’t meet ANSI/ASHRAE/IES Standard 90.1-2010 additional steps must be taken by the Ownership Entity to meet the standard prior to issuance of IRS Form 8609.

<u>Notes</u>

1. Per 2019 QAP, Appendix 1-G, high energy efficiency components and appliances are encouraged.

2. Per 2019 QAP Appendix 1, once final plans, specifications, the energy audit or analysis have been completed, the Applicant shall submit them to IFA and receive written approval before commencing site work or construction.

The energy efficiency required documents listed above as stated in the QAP, Appendix 1 G-3.2, shall be prepared by a duly licensed engineer or architect authorized to do business in Iowa and/or the HERS ratings shall be submitted by a RESNET certified rating agent.

APPENDIX J

SENIOR LIVING REVOLVING LOAN
PROGRAM INFORMATION

Purpose: This loan program is to assist in the development of affordable assisted living and service enriched affordable housing for seniors and persons with disabilities. The loans can be used for the construction period and the permanent loan. This program is administered following the rules established in 265—Chapter 20.

This loan program is available for senior housing projects that receive an allocation of 9% tax credits, and successfully finalize a syndication or direct investment agreement for the purchase of tax credits.

Available funds: $2,000,000

Amount of Loan: The maximum loan amount is $1,000,000 and the minimum loan amount is $100,000.

Loan Terms: The maximum loan term and amortization period are 30 years. The interest rate is 1%. Loans will be secured by a first mortgage.

Debt Service Ratio: 1.25:1 for IFA's first mortgage (minimum of 1.20:1 overall), as calculated by the Authority.

Fees: No additional fees are due at the time of application. A commitment fee of 1% and an inspection fee of .5% of the loan amount are due upon acceptance of the commitment for the construction loan. A commitment fee of 2% of the loan amount is due upon acceptance of the commitment for the permanent loan.

Instructions:
If applying for this funding source:
1. The online Application must have the Senior Living Revolving Loan box checked on the Project Description Tab with the loan amount and terms listed on the Funding Sources Tab.
2. In the event that insufficient funds are available for a project, provide an alternative funding source with a commitment letter and save under Exhibit 5T or 6T. Provide a 15 year proforma and sources and uses with the alternative sources of funds and save under the same Exhibit 5T or 6T. The LIHTC amount is required to stay the same for both scenarios.

APPENDIX K

MARKET STUDY PRE-APPLICATION, SET-ASIDES, AND APPLICATION EXHIBITS & SCORING CHECKLIST

Market Study Analysis Pre-Application ("Pre-Application")				
A Pre-Application shall be submitted for all 2019 proposed Projects on November 1, 2018, no later than 4:30 p.m. C.S.T. The Pre-Application exhibits are as follows: 11T, 12T (optional), 3B, 4B, and 5B.				
EXHIBIT	**SUPPLIED BY**	**APPLICATION REFERENCE**	**NARRATIVE DESCRIPTION**	**WHEN REQUIRED**
11T	Applicant Upload	Exhibits Tab	**Utility Allowance Documentation** • Must be most recent PHA, HUD, or RD utility allowance documentation. • Circle amounts on the chart. • If the documentation is over a year old provide a statement via email or letterhead indicating it is most current from the provider.	**All proposed Projects**
12T	Applicant Upload	Exhibits Tab	**Market Study Documentation** • Provide market information that may be helpful in determining market feasibility of the proposed Project. • An individual project's Market Study Report shall be used solely for determining the market feasibility of the Project on an individual project basis.	**Optional**
3B	Applicant Upload	Site Description	**Color Photos of Project & Adjacent Property** Submit as one PDF file: • Eight photos of each building are required for sites with existing buildings. ✓ Looking at each bldg. from the North, South, East, & West. ✓ Looking out from each bldg. toward the North, South, East, & West. • Eight photos are required for each site location for new construction projects. ✓ Looking toward the center of each site from the North, South, East, & West. ✓ Looking out from the center of each site toward the North, South, East, & West. • The photo shall include the street address, bldg. number & direction taken. This information can be included on the photo itself, or in the electronic name of the photo.	**All proposed Projects**
4B	Applicant Upload & Online Application	Site Description & Buildings	**Maps** • Legible recent official city map pinpointing the site location(s). Shall show the legal address of the property, the names of surrounding streets & any other information important for the site inspection. • A plat map or proposed re-platting map for each site location • Both are required.	**All proposed Projects**
5B	Applicant Upload & Online Application	Site Description, Site Control & Buildings	**Site and Floor Plans** Shall clearly show the following: • Location and extent of all work proposed in the Application • Site dimensions • Site zoning • Accessible site routes • Accessible Units • Easements and setbacks • Planting, utility & general notes • All buildings (including manager's Units & accessory buildings), total number of Units, Net Square Footage of each Unit, and the total square footage of each building. • Unit numbers and AMI% of each Unit when the Owner has elected Income Averaging for the Minimum Set-Aside.	**All proposed 2019 Projects**

APPENDIX K

NON PROFIT SET-ASIDE Refer to QAP Sections 2.2.1 and 3.2.1.3				
Applicants requesting the Nonprofit Set-Aside shall complete the following tabs in the Application and upload the required exhibits no later than November 30, 2018 at 4:30 p.m. C.S.T.: Nonprofit Set-Aside, Project Name and Location, and the General Partner/managing member - Qualified Development Team tab. Submit the request for Nonprofit approval through the Nonprofit Set-Aside tab. Please note this is required for each Application that is submitting request for the Nonprofit Set-Aside in the 2019 funding round and is not per Nonprofit organization.				
EXHIBIT	**SUPPLIED BY**	**APPLICATION REFERENCE**	**NARRATIVE DESCRIPTION**	**WHEN REQUIRED**
1SA	Applicant Upload & Online Application	Nonprofit Set-Aside & Qualified Dev. Team	Internal Revenue Service ("IRS") Letter Stating the Nonprofit is a Qualified Nonprofit under 501(c)3 or 501(c)4	**Projects applying for this Set-Aside.**
2SA	Applicant Upload & Online Application	Nonprofit Set-Aside & Qualified Dev. Team	Attorney's Opinion Stating the Proposed Nonprofit is legally Organized and Eligible to Participate • IFA Required Template	**Projects applying for this Set-Aside.**
3SA	Applicant Upload & Online Application	Nonprofit Set-Aside & Qualified Dev. Team	Nonprofit File-stamped Articles of Incorporation • Shall include as a purpose the fostering of low-income (or affordable housing) & other items that demonstrate satisfaction of the 2-year requirement for fostering low-income housing or requirements of 42(h)(5)	**Projects applying for this Set-Aside.**
4SA	Applicant Upload & Online Application	Nonprofit Set-Aside & Qualified Dev. Team	Nonprofit Resume • Shall demonstrate the Nonprofit's capacity to materially participate in the operation of the Project through the Compliance Period and Extended Use Period.	**Projects applying for this Set-Aside.**
5SA	Applicant Upload & Online Application	Nonprofit Set-Aside & Qualified Dev. Team	IRS Confirmation of Continued Qualified Nonprofit Status • Submit a print out from the IRS showing the nonprofit entity is still a qualified Nonprofit. Internal Revenue Service Nonprofit	**Projects applying for this Set-Aside.**

SUPPORTIVE HOUSING FOR FAMILIES SET-ASIDE Refer to QAP Sections 2.2.2 and 3.2.1.2 and 2019 Application Appendix M.				
Applicants requesting this set-aside shall complete the Project Name and Location Tab, enter the qualified service provider information on the Qualified Development Team Tab, and upload Exhibit 1HSA. Submit the request for IFA's approval through the QDT-qualified service provider tab no later than November 30, 2018 at 4:30 p.m. C.S.T.				
EXHIBIT	**SUPPLIED BY**	**APPLICATION REFERENCE**	**NARRATIVE DESCRIPTION**	**WHEN REQUIRED**
1HSA	Applicant Upload & Online Application	Appendix 2HSA & Qualified Dev. Team	Qualified Service Provider Capacity Determination Form and a Complete Copy of the Qualified Service Provider's Most Recent Independent Audit (FY 2015 or later) • IFA Required Form • Submit to IFA no later than November 30, 2018 through the Qualified Development Team - Qualified Service Provider Tab.	**Projects applying for this set-Aside**
2HSA	Applicant Upload & Online Application	2HSA & Qualified Dev. Team	Continuum of Care Review Form • IFA Required Form • Submit with the Application.	**Projects applying for this set-Aside**

ON-LINE APPLICATION				
EXHIBIT	**SUPPLIED BY**	**APPLICATION REFERENCE**	**NARRATIVE DESCRIPTION**	**WHEN REQUIRED**
1T	Applicant Upload	Qualified Dev. Team & Buildings	**Application Certification & Acknowledgements** • IFA Required Form	**All Projects**
2T	Applicant Upload	Site Control	**Current Real Estate Tax Assessment Documentation** • Refer to QAP Appendix 1-A.	**All Projects**
3T's	Applicant Upload & Online Application	Ownership Entity	**Ownership Entity (OE) Documentation** 3Ta: IRS F.E.I.N. letter in the Ownership Entity's name. 3Tb & 3Tc: A Limited Partnership ("LP"), Limited Lability Partnership ("LLP") or Limited Liability Limited Partnership ("LLLP") file-stamped certificate of Limited Partnership and a current Limited Partnership Agreement. 3Td & 3Te: A Limited Company ("LC"), Limited liability Company ("LLC") Ownership Entity's- file-stamped Article of Organization and a current Operating Agreement. 3Tf: Ownership Entity organizational chart.	**All Projects**

APPENDIX K

EXHIBIT	SUPPLIED BY	APPLICATION REFERENCE	NARRATIVE DESCRIPTION	WHEN REQUIRED
4T's	Applicant Upload & Online Application	Qualified Dev. Team	**Owner Representative(s) (General Partners/managing members) Documentation** 4Ta & 4Tb: LP, LLP, or LLLP Owner Representative's file-stamped certificate of Limited Partnership and current Limited Partnership Agreement. 4Tc & 4Td: LC and LLC Owner Representative's file-stamped Articles of Organization and current Operating Agreement. 4Te, 4Tf, & 4Tg: A Corporation Owner Representative's file-stamped Articles of Incorporation, By-laws and Board Resolution approving actions of the corporation concerning the proposed Project. • Required for each GP/MM.	**All Projects**
5T	Applicant Upload & Online Application	Funding Sources	**Letters of intent from lending institutions (on their letterhead) for all construction and permanent financing** • Provide letters on lending institution's letterhead with all required items set forth in QAP Section 4.5.1.	**All Projects**
6T	Applicant Upload & Online Application	Funding Sources	**Commitment letters from all other funding sources.** • Provide commitment letters for all other funding sources which includes, but not limited to, existing debt to be assumed, grants, loans, tax credits, tax increment financing, etc. Refer to QAP Section 4.5.2 • Provide a city resolution adopted by the city council that allows the creation of a TIF district or an Urban Revitalization Tax Exemption (URTE), subject to the Project being awarded Tax Credits. Refer to QAP Section 4.5.2 • The minimum General Partner/Managing Member contribution shall require a commitment letter. Refer to QAP Section 4.7.1	**All Projects**
6Ta	Applicant Upload & Online Application	Funding Sources & Qualified Dev. Team	**Nonprofit Board of Director's Board Resolution Allowing a Deferred Payment Obligation to the Project** • Refer to QAP Section 4.4.	**If applicable**
7T	Applicant Upload & Online Application	Project Description & Buildings	**HUD, RD and PHA Authorization to Release of Information** • Provide the applicable HUD, PHA or Rural Development (RD) Required Form.	**If applicable**
8T	Applicant Upload & Online Application	Project Description, Site Control, Buildings, & Costs and Credit Calc.	**Attorney Opinion as to Project Acquisition Qualification** • IFA Required Template. • Acquisition/Rehabilitation and Adaptive Reuse Projects requesting Acquisition Tax Credits shall submit an Attorney Opinion letter as to the qualification for acquisition Tax Credits according to the Internal Revenue Code. • Refer to QAP Section 5.12.	**If applicable**
9T	Applicant Upload & Online Application	Qualified Dev. Team & Costs and Credit Calc.	**Executed Copy of the Development Consultant Agreement(s)** • Provide an executed copy.	**If applicable**
10T	Applicant Upload & Online Application	Funding Sources & Qualified Dev. Team	**Syndication or Other Sale or Exchange of Tax Credit Interest to Investors Documentation** • Provide an executed copy. • Enter the Syndicator/Direct Investor providing the interest letter on the Qualified Development Team Tab.	**All Projects**
11T	Applicant Upload & Online Application	Project Description & Buildings	**Utility Allowance Documentation** Most recent PHA, HUD, or RD or utility allowance documentation showing utility calculations. • Circle utility amounts on chart. • If the documentation is over 1 yr. old, provide a statement from the provider confirming that the utility amounts are current. • HUD Projects shall provide a copy of the most current HUD Rent Schedule regardless if all utilities are included in rent. • RD Projects shall provide current documentation of RD utility allowance and budget/rent approval. • Do not submit any other form of utility allowance documentation.	**Required when all utilities are not included in rent and for all Projects with Federal Project-Based Rental Assistance.**
13T	Applicant Upload		**Executed IRS Form 8821 (Tax Information Authorization) for the Developer(s)** IRS Form 8821	**If requested by IFA**

APPENDIX K

EXHIBIT	SUPPLIED BY	APPLICATION REFERENCE	NARRATIVE DESCRIPTION	WHEN REQUIRED
14T's	Awarded Applicant Upload & Online Application	Ownership Entity & Qualified Development Team	**Authorized Signor(s) Documentation** 14Ta: Ownership Entity - IFA Required Form 14Tb: General Partner(s)/managing member(s) - IFA Required Form • Awarded Applicants shall submit documentation of authorized signor(s) for each entity with Ownership in the Project. This includes entities that have Ownership in a General Partner or managing member.	**All Awarded Projects 30 days after Reservation of Credits**.
15T	Applicant Upload & Online Application	Ownership Entity & Qualified Dev. Team	**State Agency Performance Information** • IFA Required Form • Upload a copy of each of the completed Exhibit 15T's along with a copy of the email sent to each state agency. • Email Exhibit 15T to each state agency listed. **Part 1 - Authorization of Release of Information & Project Information** • Any project team members associated with the application who have materially participated in a development role shall complete. Development role includes Developer(s), General Partners/managing members and Ownership Interest. • Complete for each state in which the individuals /entity has previously participated or is currently participating in the Low Income Housing Tax Credit Program, including Iowa. . **Part 2 - IRS Form 8823 and State Noncompliance Detail and Narrative** • Shall be completed & signed by the individual/entity listed on Exhibit 15T Part 1, Section 1-D. • List all IRS form 8823's (annual reports and/or on-site inspections) that were issued against each property between October 15, 2017 and October 15, 2018. • List all Out of Compliance issues that have been reported as uncorrected (regardless if the "Out-of-Compliance" has been subsequently corrected) to the IRS for each LIHTC Project between October 15, 2015 and October 15, 2018. • List all State Issued Notice of Noncompliance issues (which addresses issues that aren't in compliance with the LURA) that have been reported since October 15, 2015 – October 15, 2018. **Part 3 - State Agency Performance Questionnaire** • Complete Section 1.	**All Projects**
16T	Applicant Upload	Buildings & Costs and Credit Calc.	**QCT/DDA Map** • Provide a map generated from the HUD GIS Website showing the entire Project is currently located in a QCT or DDA.	**If applicable**
17T	Applicant Upload	Project Name and Location, Buildings, Project Description	**Location Near Services** • Provide a Google Map (www.Googlemaps.com) using the Project's Primary Address ("PA") listed in the Buildings Tab and name and address of service. • Requirements of QAP Section 5.4.2 shall be met.	**All Projects**
18T	Applicant Upload	Project Name and Location, Buildings, Site Description & Costs and Credit Calc.	**Concerted Community Revitalization Plan for Projects located within a Qualified Census Tract ("CCRP")** • Provide a copy of the Concerted Community Revitalization Plan applicable to the Project located within the CCRP area and in QCT.	**If applicable**
19T	Applicant Upload	Site Description	**Scattered Site Google map** • Provide a Google Map (www.Googlemaps.com) showing each site is located within a 20-mile radius. • Refer to QAP Section 5.6.	**Scattered Site Projects**
20T	Applicant Upload	Project Description & Buildings	**Income Averaging** • Provide floor plan with Unit Numbers and the AMI% for each Unit. • Provide calculation showing the income/rent average of all Units is sixty percent (60%) or less of AMI.	**If applicable**
1B	Applicant Upload & Online Application	Site Control & Buildings	**Site Control or Ownership of Site(s)Documentation** • Provide executed documents showing site control. • .Refer to QAP Appendix 1-A.	**All Projects**
2B	Applicant Upload & Online Application	Site Control & Costs and Credit Calc.	**Appraisal** • Required when land and buildings are acquired from a party with an Identity of Interest as defined in QAP Appendix 2 – Glossary of Terms. • Valuation of land and buildings must be shown separately. • Refer to QAP Section 5.9.	**If applicable**

APPENDIX K

EXHIBIT	SUPPLIED BY	APPLICATION REFERENCE	NARRATIVE DESCRIPTION	WHEN REQUIRED
3B	Applicant Upload	Site Description	**Color Photos of Project & Adjacent Property** Submit as one PDF file: • Eight photos of each building are required for sites with existing buildings. ✓ Looking at each bldg. from the North, South, East, & West. ✓ Looking out from each bldg. toward the North, South, East, & West. • Eight photos are required for each site location for new construction projects. ✓ Looking toward the center of each site from the North, South, East, & West. ✓ Looking out from the center of each site toward the North, South, East, & West. The photo shall include the street address, bldg. number & direction taken. This information can be included on the photo itself, or in the electronic name of the photo.	**All Projects in the Pre-Application**
4B	Applicant Upload & Online Application	Site Description & Buildings	**Maps** • Legible recent official city map pinpointing the site location(s). Shall show the legal address of the property, the names of surrounding streets & any other information important for the site inspection. • A plat map or proposed re-platting map for each site location • Both are required.	**All Projects in the Pre-Application**
5B	Applicant Upload & Online Application	Site Description, Site Control & Buildings	**Site and Floor Plans** Shall clearly show the following: • Location and extent of all work proposed in the Application • Site dimensions • Site zoning • Accessible site routes • Accessible Unit Types • Easements and setbacks • Parking • Planting, utility & general notes • All buildings (including manager's Units & accessory buildings), total number of Units, Net Square Footage of each Unit, and the total square footage of each building.	**All Projects In the Pre-Application & at Threshold Application submission, if changes**
6B's	Applicant Upload & Online Application	Site Description	**Detrimental Site Characteristics Remediation Documents** If the site or adjoining sites contain any detrimental site characteristics, provide the following: • 6B a: Remediation Plan • 6B b: Budget to make site suitable • 6b c: Map showing detrimental characteristics on site plan • Refer to QAP Appendix 1-H	**If applicable**
7B	Applicant Upload & Online Application	Ownership Entity, Buildings, Site Description & Exhibits	**Political Jurisdiction Certification** • IFA Required Form • Generate on the Exhibits Tab after the Project Name & Location, Buildings, Ownership Entity, and Site Description tabs have been completed. • Shall be completed by an authorized city official with an attached site plan.	**All Projects**
8B	Applicant Upload & Online Application	Buildings, Project Amenities, Project Description & Construction Characteristics	**Plans and Specifications** Shall show all proposed work at a minimum schematic design level of completion. • Label the use of all rooms in the building (i.e., computer learning center, manager's Unit, manager's office, library, media center room, craft room, maintenance room, dining room, fitness center, laundry room, beauty salon/barber room, etc.) • Label the square footage of each room in the building • Label Accessible routes • Label all Units with Accessibility type • List total number of Units • List total number of parking and type of parking (surface, garages, underground) • Label all rooms in the Units (i.e. bedroom, bathroom, kitchen, living room, closets, etc.) • Label the net square footage of each Unit	**All Projects**
9B	Applicant Upload & Online Application	Construction Characteristics, Project Amenities & Project Description	**Preliminary Costs and Scope of Work** • IFA Required Form • Provide a Scope of Work for the Project that includes a cost estimate for the Hard Construction Costs for the Project. • Refer to QAP Section 5.10	**All Projects**

APPENDIX K

QAPSECTION 6 - SCORING				
EXHIBIT	**SUPPLIED BY**	**APPLICATION REFERENCE**	**NARRATIVE DESCRIPTION**	**WHEN REQUIRED**
	Online Application	Project Description & Buildings	**6.1.1 Serves Lowest Income Residents (0 to 20 points)** • Check the box on the Project Description Tab. • On the Buildings Tab, enter the number of LIHTC Units that shall be set-aside and occupied by tenants with incomes at forty percent (40%) AMI or less and are rent restricted. • On the Buildings Tab, enter the number of LIHTC Units that shall be set-aside and occupied by tenants with incomes at thirty percent (30%) AMI or less and are rent restricted. These Units shall be in addition to any Units selected for the forty percent (40%) AMI or less. • Only points for the 40% AMI or less is available to an Applicant applying under the Supportive Housing for Families Set-Aside. *This category is not available to an Applicant that elects points in Section 6.1.4 – Provides an Opportunity for Homeownership, an Applicant that elects the Income Averaging Minimum Set-Aside, or a Project that has Federal Project-Based Rental Assistance, HUD-VASH Voucher Assistance, or Local Project-Based PHA Voucher Assistance.*	**If applicable**
	Online Application	Project Description & Buildings	**6.1.2 Market Rate Incentive (0 to 10 points)** • Check the box on the Project Description Tab. • Enter the market rate Units in the Buildings Tab. *This category is not available to an Applicant that elects points in Section 6.1.4 – Provides an Opportunity for Homeownership, an Applicant that elects the Income Averaging Minimum Set-Aside, or a Project that has Federal Project-Based Rental Assistance, HUD-VASH Voucher Assistance or Local Project-Based PHA Voucher Assistance.*	**If applicable**
	Online Application	Project Description & Buildings	**6.1.3 Serves Tenant Population of Individuals with Children (3 points)** • Check the box on the Project Description Tab. • Enter at least ten percent (20%) of the Units in the Buildings Tab as three or more bedroom LIHTC Units. Projects with three bedroom Units shall have at least one full bathroom and one three quarter bathroom. Projects with four or more bedrooms Units shall have at least two (2) full bathrooms. A minimum 5" wide ADA compliant roll in shower may be substituted for one tub in a four bedroom Unit. *This category is not available to an Applicant applying under the Supportive Housing for Families Set-Aside.*	**If applicable**
	Online Application	Project Description	**6.2.1 Great Places (2 points)** • Check the box on the Project Description Tab if a Project is within a project identified in an Iowa Great Places agreement that has been designated by the Iowa Great Places Board for participation in the program within the last three years, pursuant to Section 303.3C, subsection 4 of the Iowa Code. • If a Scattered Site Project, all building addresses shall meet the Great Places requirement.	**If applicable**
	Online Application	Project Description & Buildings	**6.2.2 Density (0 to 8 points)** • Enter the correct complete address (number and street name, city, and nine-digit zip code) for each building (at each site) in the Buildings Tab. • If a Scattered Site Project, all building addresses shall be listed in a qualifying census tract to be eligible for points. If buildings are in different categories of qualifying census tracts, the lesser points shall be awarded. • Refer to 2019 Application Appendix L.	**If applicable**
	Online Application	Project Description & Buildings	**6.2.3 Iowa Opportunity Index Census Tracts (0 to 5 points)** • Enter the correct complete address (number and street name, city, and the nine-digit zip code) for each building at each site in the Buildings Tab. • If a Scattered Site Project, all building addresses shall be listed in a qualifying opportunity area to be eligible for points. If buildings are in different categories of qualifying opportunity areas, the lesser points shall be awarded. • Refer to 2019 Application Appendix D.	**If applicable**
	Online Application	Project Amenities & Projected Operating Costs	**6.3.1 Market Appeal (0 to 39 points)** • Check all applicable boxes. • Enter applicable expenses in the Projected Operating Costs Tab as applicable. • Show all elections in the plans and specifications and the Scope of Work.	**If applicable**
	Online Application	Project Amenities	**6.3.4 Construction/Unit Characteristics (0 to 16 points)** • Check the applicable boxes. • Show all elections in the plans and specifications and the Scope of Work.	**If applicable**

APPENDIX K

EXHIBIT	SUPPLIED BY	APPLICATION REFERENCE	NARRATIVE DESCRIPTION	WHEN REQUIRED
	Online Application & Applicant Upload	Buildings	**6.3.5 Olmstead Goals (0 to 13 points)** • Enter the number of Accessible Unit types. • Enter each Accessible Unit Type. • If at least fifty percent (50%) of the Fully Accessible Units and Additional Accessible Type A Units entered into the Buildings Tab are two, three, or four bedroom LIHTC Units, preliminary points shall automatically be requested. • Refer to QAP Appendix 2-Glosary of Terms, Accessible Units.	**If applicable**
	Online Application	Project Description	**6.3.6 Impact on Environment (0 to 8 points)** • Check the applicable boxes. • Show all elections in the plans and specifications and the scope of work.	**If applicable**
	Online Application	Project Description	**6.3.7 Energy Efficiency (8 points)** • Check the applicable box(es) . • Projects that include New Construction and Existing Structures must comply with each applicable election and check each box to receive the full 8 points. *The 2015 International Energy Conservation Code ("IECC") election is not available to Projects utilizing Historic Tax Credits.*	**If applicable**
	Online Application	Project Description	**6.4.1 Iowa Title Guaranty (7 points)** • Check the box.	**If applicable**
	Online Application	Qualified Development Team	**6.4.2 Developer or General Partner/Managing Member Experience (5 points) and Performance (-3 points maximum)** • Answer the experience questions and enter the corresponding information for the Developer and/or General Partner/managing member or Development Consultant if applicable, of this Project. (5 points maximum) • Answer the performance questions..	**If applicable**
	Online Application	Project Description	**6.4.3 Waives Right to Qualified Contract (25 points)** • Check the box. *This category is not available to an Applicant that elects points in 6.1.4 - Provides an Opportunity for Homeownership.*	**If applicable**
	Online Application	Project Description & Costs and Credit Calc.	**6.4.4 Construction and On Site Work Costs (0 to 3 points)** • Check the applicable box on the Project Description Tab to request points for this category. I	**If applicable**
1S	Applicant Upload & Online Application	Project Description	**6.4.5 Capital Needs Assessment (5 points)** • Check the box and upload the Capital Needs Assessment ("CNA"). • Refer to QAP Appendix 2-Glossary, Capital Needs Assessment. *This category is not available for Adaptive/Reuse Projects.*	**Acq/Rehab or Rehab Projects**
2S	Applicant Upload & Online Application	Project Description & Buildings	**6.1.4 Provides an Opportunity for Homeownership (15 points)** • IFA Required Form • Provide the signed Owner/GP Acknowledgement of Appendix G, along with the required Iowa ROSE homeownership plan ("Plan"). The Plan and the signed Owner/GP Acknowledgement are due at Threshold Application submission as part of the Exhibit 2S. • Check the box on the Project Description Tab. • Refer to 2019 Application Appendix G - Iowa Rose Program and QAP Appendix 2-Glossary of Terms, ROSE Program. *This category is not available to an Applicant that elects points for Section 6.1.1 – Serves Lowest Income Residents, Section 6.1.2 – Market Rate Incentive, Section 6.4.3 – Waives Right to a Qualified Contract, an Applicant applying under the Supportive Housing for Families Set-Aside, or an Applicant that elects the Income Averaging Minimum Set-Aside.*	**If applicable**
4S	Applicant Upload & Online Application	Project Description & Site Description	**6.4.6 Environmental Site Assessment (1 point)** • Check the box and upload the Phase I Environmental Site Assessment. • Enter detrimental site characteristics on Site Description Tab, if applicable.	**If applicable**
	Online Application	Project Descr., Funding Sources, Buildings, Costs & Credit Calc. & Financial Feasibility	**6.4.7 Leverage – Tax Credit Cap (3 points maximum)** • Select yes on the Project Description Tab.	If applicable

EXHIBIT	SUPPLIED BY	APPLICATION REFERENCE	NARRATIVE DESCRIPTION	WHEN REQUIRED
6S	Applicant Upload & Online Application	Project Description, Buildings & Funding Sources	**6.3.2 Projects with Historical Significance (8 points)** • Provide documentation from the State Historical Preservation Officer demonstrating that all buildings within the Project are listed on the National Register of Historic Places or determined to be eligible for the National Register by the State Historic Preservation Officer. • Enter State and Federal Historic Tax Credits as a funding source in the Funding Source Tab. • If the Applicant does not have a commitment for State Historic Tax Credits, a General Partner Loan in anticipation of receipt of the State Historic Tax Credits may be entered in the Funding Sources Tab and a commitment letter provided. • Answer the related question for each building on the Buildings Tab.	**If applicable**
7S	Applicant Upload & Online Application	Project Description	**6.3.3 Projects that have Federal Project-Based Rental Assistance, HUD-VASH Voucher Assistance or Local Project-Based PHA Voucher Assistance (0 to 35 points)** • HUD, PHA, or Rural Development (RD) Form • Check the applicable box on the Project Description Tab. • Provide the applicable signed Release of Information (HUD, PHA, or Rural Development Required Form) completed and signed by the titleholder of the real estate with the Federal Project-Based Rental Assistance or HUD-VASH Vouchers. • Provide the signed PHA Release of Information form for Local Project Based PHA Voucher Assistance or HUD-VASH Vouchers. • Points may only be requested for one of the following: Project-Based Rental Assistance, HUD-VASH Voucher, or Local Project-Based PHA Voucher assistance. *This category is not available to an Applicant that elects points for Section 6.1.1 – Serves Lowest Income Residents, Section 6.1.2 – Market Rate Incentive, an Applicant applying under the Supportive Housing for Families Set-Aside, or an Applicant that elects the Income Averaging Minimum Set-Aside.*	**If applicable**

APPENDIX L

DENSITY

Appendix L provides the census tract data for Qualified Allocation Plan "QAP" Section 6.2.2 Density. IFA's data was obtained with the following parameters:

- 2010 U.S. Census Data – Total number of households in the census tract;
- Awarded LIHTC Projects within their initial fifteen (15) years; and
- The number of LIHTC Units Placed-In-Service since January 1, 2010 in the census tract divided by the number of households in the census tract.

Projects located in a census tract that has 20.01% or more of LIHTC Units Placed-In-Service since January 1, 2010, are not eligible for scoring points in this category. Projects located in a census tract that has between 10.00% and 20.00% are eligible for 5 points and Projects located in a census tract that has between 0% and 9.99% are eligible for 8 points.

If a Scattered Site Project, all building addresses shall be listed in a qualifying census tract to be eligible for points. If buildings are in different categories of qualifying census tracts, the lesser points shall be awarded.

0 POINTS – 20.01% and above		
County	**Census Tract**	**Percentage**
Polk	51	30.74%
Black Hawk	1	30.12%
Polk	1.01	24.31%
Polk	27	23.69%
Linn	19	23.47%
Polk	7.01	23.10%
Webster	7	22.7%
Polk	116	NA
Woodbury	9402	NA

5 POINTS – 10.00% to 20.00%		
County	**Census Tract**	**Percentage**
Scott	109	19.49%
Dallas	508.12	17.93%
Polk	52	17.76%
Linn	27	17.72%
Polk	47.02	17.72%
Black Hawk	9	15.49%
Scott	129.01	15.22%
Woodbury	36	13.55%
Linn	3	12.59%
Black Hawk	19	10.47

8 POINTS – 0.00% to 9.99%
County census tracts not listed.

APPENDIX M
SUPPORTIVE HOUSING FOR FAMILIES SET-ASIDE

PART 1 – REQUIREMENTS

Section 1 – General Information

1.1 Purpose
This set-aside is for a Project that shall provide permanent supportive housing for families experiencing homelessness. An Applicant applying for this set-aside shall not apply for the same Project in another set-aside or in the General Pool. If this set-aside is filled and the Project remains unfunded, the Project may not compete in any other set-aside or in the General Pool.

1.2 Project Requirements
Only one Application may be approved for the set-aside. The Project must meet all 2019 QAP threshold items, as well as the additional requirements of this set-aside, which will be determined by IFA in its sole discretion based on an individualized in-depth analysis of each Project.

This set-aside shall receive $840,000 of all available Tax Credits. This $840,000 shall be outside of the limitations stated in the 2019 QAP Section 2.3 – Maximum LIHTC Allocation.

The Project shall reserve the required minimum number of Units to provide permanent supportive housing to families experiencing homelessness. "Families experiencing homelessness" is defined for this set-aside to mean an individual or family who lacks fixed, regular, and adequate nighttime residence; meaning:

- Has a primary nighttime residence that is a public or private place not meant for human habitation;
- Is living in a publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state and local government programs); or
- Is exiting an institution where (s)he has resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution."

A Project shall:

- Be located within a city with of population of 25,000 or more based on 2010 U.S. Census data (see Table 1 on p. 3);
- Be new construction or adaptive reuse;
- Reserve ten percent (10%) of the total Project Units (rounded up to the next full Unit) or four Units, whichever is greater, to persons experiencing homelessness. These Units shall be leased only to qualified families experiencing homelessness and therefore IFA's Held for Occupancy policy, as defined in the 2019 QAP Appendix 2 - Glossary, shall not apply;
- Units set aside for this set-aside shall be dispersed throughout the Property and in different bedroom sizes rather than segregated;
- Provide adequate community space to allow for the delivery of any supportive services to be made available to tenants on-site, as applicable;
- The Units reserved for families experiencing homelessness shall remain reserved for this purpose through the entirety of the LURA. The exception to this rule would be if Iowa no longer has a homeless population as defined by a ninety percent (90%) reduction in total persons experiencing homelessness according to the annual Point-in-Time Count, with the 2018 Point-in-Time Count serving as the baseline number against which to compare future results. Point-in-Time Count information is available here: https://www.hudexchange.info/resource/3031/pit-and-hic-data-since-2007/.
- Be a Family Project without age restrictions; and
- Partner with an IFA approved qualified service provider that provides supportive services to families experiencing homelessness in the proposed Project's market area; and

A Project shall demonstrate a strong relationship with a qualified service provider that will provide supportive services to families experiencing homelessness that will reside in the Project. IFA shall review the written agreement between the entities to ensure that there is a commitment to an extensive and long-term working relationship. IFA will review the capacity of the Developer and qualified service provider to provide permanent supportive housing including their past experience with such a Project.

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SUPPORTIVE HOUSING FOR FAMILIES SET-ASIDE

Section 2 - Qualified Service Provider Information and Reporting Requirements

2.1 Qualified Service Provider
The Applicant shall enter into a written agreement with the qualified service provider to provide supportive services to families experiencing homelessness who will reside in the Project. The Developer, property manager and qualified service provider shall enter into a written agreement to forge an extensive and long-term partnership to provide permanent supportive housing to eligible tenants.

2.2 Qualified Service Provider Capacity Determination
The qualified service provider must be approved by IFA prior to application submission in order for the Project to be eligible for an award of Tax Credits. IFA reserves the right to deny approval to any proposed qualified service provider that has failed to comply with program requirements in the administration of any previous project funded by IFA through any of its programs.

The Applicant shall submit a completed Exhibit 1HSA - Qualified Service Provider Capacity Determination form and a complete copy of the qualified service provider's most recent independent audit (fiscal year 2016 or later) through the online Application no later than November 30, 2018. IFA staff shall make a determination of the qualified service provider's capacity to carry out responsibilities related to the Supportive Housing for Families set-aside Project. The qualified service provider must have: (1) received a funding award since October 1, 2015, under one or more federal programs providing housing related services to families experiencing homelessness (2) direct experience providing services to families experiencing homelessness within the qualifying city which the proposed Project will be located; (3) the necessary experience, staffing and operational capability to deliver case management and services to families experiencing homelessness residing in the supportive housing Project; and (4) demonstrated the capacity to provide an adequate number of eligible tenants to occupy the permanent supportive housing units set aside for families experiencing homelessness in the Project throughout the Compliance Period. Collaborations or partnerships among agencies may be proposed to address the needs of supportive housing tenants as part of the capacity determination, although the lead qualified service provider must meet all threshold requirements for capacity determination. IFA shall notify the Applicant of its capacity determination for the proposed qualified service provider on or about December 7, 2018. Staff may request additional clarifying information to confirm the information submitted in the Exhibit. IFA reserves the right to verify information contained in the Exhibit and to discuss the Applicant's and Project qualifications. IFA also reserves the right to obtain and consider information from other sources concerning a qualified service provider and Project.

2.3 Reporting Requirements
The Project shall submit participant information for those tenants living in the Units designated for families experiencing homelessness, utilizing the Iowa Homeless Management Information System ("HMIS"), according to HUD's HMIS Data and Technical Standards. This includes minimum participant demographic information according to HUD's standards for "Other Permanent Housing (OPH)," which means permanent housing projects that are designated for homeless people that provide housing and services, but for which disability is not required for entry. If the qualified service provider qualifies primarily as a domestic violence service provider, the information shall be submitted in a database that meets HUD's standards as a comparable database.

Section 3 – Underwriting

3.1 Tax Credit Cap
The maximum amount of Tax Credits per LIHTC Unit for a Project under this set-aside is as follows:

New Construction – Adaptive/Reuse	Studio	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms
	$10,570	$13,185	$15,550	$18,660	$20,525

The selected Project shall be eligible for a thirty percent (30%) basis boost and will be allowed to exceed the Tax Credit Cap per LIHTC Unit listed above. The maximum Tax Credit amount that will be awarded to the one Project is $840,000. The Project may be eligible for funds under the National Housing Trust Fund created pursuant to the Housing and Economic Recovery Act of 2008, if IFA receives an allocation of such funds.

This set-aside is not eligible for Section 4.11.3 – Income Average Test.

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SUPPORTIVE HOUSING FOR FAMILIES SET-ASIDE

3.2 DSCR

Projects applying for this set-aside will not be required to have hard debt. All Projects WITH DEBT shall reflect an average Debt Service Coverage Ratio (DSCR) between 1.00 DSCR and 2.00 DSCR. Any one year cannot go below 1.00 DSCR or above 2.00 DSCR for the first 15 years. Projects without debt shall maintain a net cash flow equal to or greater than $0 each year for the first 15 years.

3.3 Vacancy Rate

Projects will be underwritten at a seven percent (7%) vacancy rate in addition to the set-aside Units, which will be underwritten assuming zero income. Projects with twenty-five (25) Units or less will be underwritten at a ten percent (10%) vacancy rate in addition to the Units designated for families experiencing homelessness.

Table 1. Cities with a population of 25,000 or more based on 2010 U.S. Census data

City	
Ames	Fort Dodge
Ankeny	Iowa City
Bettendorf	Marion
Burlington	Marshalltown
Cedar Falls	Mason City
Cedar Rapids	Ottumwa
Clinton	Sioux City
Council Bluffs	Urbandale
Davenport	Waterloo
Des Moines	West Des Moines
Dubuque	

PART 2 – SCORING (maximum 100 points)

IFA will award scoring points based on information provided in the on-line Application. IFA shall make the final determination of the Applicant's score. In addition to the points awarded in the on-line Application, a threshold requirement of 50 points must be met under the criteria set forth below in Part 2 – Scoring – Sections 1-5.

Section 1 – Tenant Characteristics and Selection Process (17 points)

Describe the target population (families with children or adults) for the set-aside Units in the proposed Project. (5 points for families with children)

Describe the tenant eligibility screening criteria, including any disqualifiers, or prioritization criteria. (3 points)

Describe the outreach plan to bring potential tenants into the Project. If participating in a community's Coordinated Entry system, as defined by HUD, describe this. (A HUD Coordinated Entry Policy Brief is available here: https://www.hudexchange.info/resource/4427/coordinated-entry-policy-brief/). (3 points)

Describe proposed eviction mitigation practices for the supportive housing tenants. (3 points)

Describe the proposed plan to ensure effective communication among the developer, property manager, service provider, and all tenants. (3 points)

IOWA FINANCE AUTHORITY

APPENDIX M
SUPPORTIVE HOUSING FOR FAMILIES SET-ASIDE

Section 2 – Supportive Housing Services Plan (20 points)

Describe how and where services will be provided to participants by completing Table A.

Table A:

Accessibility and Availability of Services – 2 points each – maximum of 6 points				
Services	**Service Provider**	**Location of Service** (On-site or Off-site – if Off-site describe proximity to the Project and any transportation information in *Off-site Services)		**Service Availability** (days/hours/appointment)
Required				
		On-site	Off-site	
Case Management				
*Off-site Services				
Assistance in obtaining: a) mainstream benefits; b) increased income; and/or c) employment assistance and training.				
*Off-site Services				
Financial Management/Budgeting				
*Off-site Services				
*Any Additional Services				

Additional Services – 2 points per additional service – maximum of 14 points			
Services	**Service Provider**	**Location of Service** (On-site or Off-site – if Off-site describe proximity to the Project and any transportation information in *Other)	**Service Availability** (days/hours/appointment)
SOAR Services			
*Off-site Services			
Life Skills			
Describe Life Skills Services:			
*Off-site Services			
Community Involvement/Social Support/Recreation			
*Off-site Services			
Primary Health Services			
*Off-site Services			

Education			
Describe Education Services:			
*Off-site Services			
Chemical Dependency Services			
*Off-site Services			
Mental Health Services			
*Off-site Services			
Co-occurring Disorder Services			
*Off-site Services			
Traumatic Brain Injury Services			
*Off-site Services			
Physical Disability Services			
*Off-site Services			
Child care and other child services			
*Off-site Services			
Legal Services			
*Off-site Services			
Transportation other than Public Transportation			
*Off-site Services			

<u>Section 3 – Participant Outcomes (8 points)</u>

Describe planned participant outcomes and how they will be measured. (4 points Housing Stability Outcome Goals; 4 points Other Outcome Goals)

Housing Stability Outcome Goals	**Indicators/Measures**	**Data sources and measurement tools**
<u>Example:</u> *Long term homeless households will maintain stable housing.*	*80% of homeless households will maintain housing for six months or more.*	*HMIS length of stay data.*
<u>Example</u>: *Exits to permanent housing.*	*80% of homeless households who exit, exit to permanent housing*	*HMIS exit data.*

Other Outcome Goals	**Indicators/Measures**	**Data sources and measurement tools**
<u>Example:</u> *Maximize income and benefits for all households.*	*90% of households will apply for all benefits for which they are eligible within six months of program entry.*	*Case records, HMIS income data.*
<u>Example:</u> *Maximize income from employment for all households.*	*30% of households have increased income from employment within six months of program entry.*	*HMIS employment income data.*

APPENDIX M
SUPPORTIVE HOUSING FOR FAMILIES SET-ASIDE

Section 4 – Other Scoring (55 points)

The Developer has completed a LIHTC project that includes Units reserved for the families experiencing homelessness, in such role, since July 1, 2012: 1 project – 5 points, 2 points for each additional completed project – up to 10 points. (Maximum of 15 total points)

The Developer, managing member and General Partner do not have an Identity of Interest with the qualified service provider. (10 points)

The property is appropriately zoned for the proposed Project. (4 points)

Describe the partnership between the Developer, property management company and qualified service provider, and any previous experience these entities have working together. (5 points)

Location Near Services – Public Transportation (shall indicate bus stop location) – the Project must be located within one tenth (1/10) of one mile (4 points).

Project-based rental assistance from a source other than the Owner, Developer, property manager, qualified service provider or affiliated entities. The project-based rental assistance contract must be in place for a minimum of 5 years and must be a one hundred percent (100%) rent subsidy providing assistance equal to the established rent for the unit minus the tenant household's financial contribution.

One Set-Aside Unit is covered by a project-based rental assistance contract	(3 points)
Two Set-Aside Units are covered by a project-based rental assistance contract	(6 points)
Three Set-Aside Units are covered by a project-based rental assistance contract	(9 points)
Four Set-Aside Units are covered by a project-based rental assistance contract	(12 points)

Describe efforts taken to date to inform residents and solicit neighborhood feedback/input on the proposed project. (5 points)

Section 5 – 2019 QAP Section 6 - Scoring NOT Available in the Supportive Housing for Families Set-Aside (All other 2019 QAP threshold and scoring items apply)

6.1.1 Serves Lowest Income Residents - Projects that provide Units that are set-aside and occupied by tenants with incomes at thirty percent (30%) AMI or less and are rent restricted.

6.1.3 Serves Tenant Population of Individuals with Children - At least twenty percent (20%) of the Units shall be three or more bedroom LIHTC Units and have at least two full bathrooms.

6.1.4 Provides an Opportunity for Homeownership - Iowa Renter to Ownership Savings Equity (ROSE) Program: The Iowa ROSE Program provides a savings plan, for the benefit of each tenant, to purchase a home.

6.3.3 Projects that have Federal Project-Based Rental Assistance, HUD-VASH Voucher Assistance or Local Project-Based PHA (Public Housing Authority) Voucher Assistance.

6.4.5 Capital Needs Assessment - Acq/Rehab or Rehab Projects shall submit a complete Capital Needs Assessment with the Application.