

2017 Low Income Housing Tax Credit Program Self-Scoring Exhibit



Calculate Applicant Scores for your development on this Exhibit. You must proactively choose or decline participation in each scoring category. Points will not be awarded if not requested, or if the required documentation for a category is not submitted, is insufficient, or is in an unacceptable form. Applicants must commit via written agreements to actions supporting points awarded in scoring categories. Once a development has executed a Reservation of Credit, no changes to the development score will be allowed.

WHEDA will determine final point scores after reviewing information provided by applicant. If two or more applicants receive the same score, the application with the highest percentage of units set-aside at 30% and 40% of county median income will be ranked the highest. A secondary tiebreaker, if needed, will rank applications by lowest cost per unit.

All developments must score at least 120 points to be eligible for Credit. Points ending in a fraction will be rounded down. WHEDA reserves the right to change this threshold as it deems appropriate.

Unless otherwise noted, for scattered site developments, two-thirds of the sites must meet the scoring category criteria to receive points.

	Maximum Points
1. Lower-Income Areas	5
2. Energy Efficiency and Sustainability	32
3. Mixed-Income Incentive	12
4. Serves Large Families	5
5. Serves Lowest-Income Residents	60
6. Supportive Housing	20
7. Rehab/Neighborhood Stabilization	25
8. Universal Design	18
9. Financial Participation	25
10. Eventual Tenant Ownership	3
11. Development Team	12
12. Readiness to Proceed	12
13. Credit Usage	30
14. Opportunity Zones	25
Total	284

Reminder: In the General, Preservation and Supportive Housing set-asides, the credit limit will be \$1,400,000 per application. In the remaining set-asides, no application will be allowed to exceed one-half of the credit amount in the set-aside.

**2017 Low Income Housing Tax Credit Program
Self-Scoring Exhibit**



1. Lower Income Areas (5 points)

Five points will be awarded for:

- A. Properties in a QCT that have a community development or reinvestment plan that specifically addresses the need for affordable and/or rental housing in the area of the proposed LIHTC project
 - o Attach a print-out of census tract from American Fact Finder or similar program
 - o Provide the website location for the community revitalization/redevelopment plan or provide a hard copy of the plan
- B. Properties located on federally designated Tribal lands

Three points will be awarded for:

- A. Properties in a QCT that have a community development or reinvestment plan
 - o Attach a print-out of census tract from American Fact Finder or similar program
 - o Provide the website location for the community revitalization/redevelopment plan or provide a hard copy of the plan

2. Energy Efficiency and Sustainability - Maximum Score (32 Points)

Points will be awarded to developments which promote long-term energy efficiency and sustainability through thoughtful design and development location.

Points	Description								
20	<p>Sustainable Design Properties built to the Wisconsin Green Built Home Standard (score of 150 or more) or those meeting the Enterprise Green Communities Criteria are eligible to receive 20 points in this category.</p> <p>An unaffiliated third party verification will be required prior to release of 8609 – program certification will not be required.</p>								
4	<p>Strong Linkages</p> <p>Note: Preservation Set-Aside projects cannot score points in this category.</p> <p>WHEDA is committed to housing which provides the best possible linkages for residents and which potentially reduces resident transportation costs.</p> <p>Sites meeting the Rural Set-Aside definition:</p> <table style="margin-left: 20px;"> <tr> <td>Walk Score 60 and above</td> <td style="text-align: right;">4 points</td> </tr> <tr> <td>Walk Score between 40-59 or site on Tribal Lands</td> <td style="text-align: right;">2 points</td> </tr> </table> <p>All Other sites:</p> <table style="margin-left: 20px;"> <tr> <td>Walk Score 70 and above</td> <td style="text-align: right;">4 points</td> </tr> <tr> <td>Walk Score between 50-69</td> <td style="text-align: right;">2 points</td> </tr> </table> <p>Find "Walk Score" value by visiting www.Walkscore.com and typing in the project address. Print the Walk score webpage and submit your calculation with initial application. WHEDA will use the applicant's submitted print-out unless WHEDA needs to rerun due to applicant error</p> <p>For scattered sites, take the average of all of the address scores.</p>	Walk Score 60 and above	4 points	Walk Score between 40-59 or site on Tribal Lands	2 points	Walk Score 70 and above	4 points	Walk Score between 50-69	2 points
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Walk Score 70 and above	4 points								
Walk Score between 50-69	2 points								
4	<p>Public Transportation Points will be awarded to developments located in which any portion of the site is no more than one-half (0.5) of a mile from a regularly scheduled local bus stop. Projects on tribal land with "on call" transportation programs that provide the users a choice of local destinations shall be eligible for these points. Provide corroborating information with initial application</p>								
4	<p>Non-Smoking Properties designated as non-smoking and evidenced in "house rules" or lease would be eligible to receive up to 4 points in this category.</p>								

**2017 Low Income Housing Tax Credit Program
Self-Scoring Exhibit**



3. Mixed Income Incentive (12 Points)

NOTE:

- Applicants applying in the Supportive Housing Set-Aside are prohibited from scoring points in this category.
- Applicants applying in the Preservation Set-Aside are prohibited from scoring points in this category
- Applicants with scattered site developments should consult with their tax or legal counsel before selecting points in this category. See IRS Code Section 42(g) (7).

Percentage of market-rate units in development. Score 0.80 points for every percentage point of market-rate units in the development as a whole, up to 12 points. Common space manager units should not be included in the total unit count.

Number of Market Rate Units		
Total Units		= XX %
Multiplied by 0.80	X 0.80	= XX Points

4. Serves Large Families (5 Points)

NOTE:

- Supportive Housing Set-Aside applications cannot score points in this category.
 - Majority elderly developments cannot score points in this category, unless the property includes family units located in a separate building (or buildings) on the **same site** as the elderly units.
1. New construction/adaptive reuse units must
 - be 50% CMI or below AND
 - have ground floor private entrances (include architect's certification with initial application)
 2. The market study and the LIHTC application must clearly identify the development as "Family" to claim points.

Divide the number of three-bedroom (or larger) low income Family units by total number of low income units.

Three-Bedroom (or Larger) Low Income Units		
Total low income units	/	= XX%

Percentage	Points
5-10%	1
11-15%	3
16% or greater	5

**2017 Low Income Housing Tax Credit Program
Self-Scoring Exhibit**



5. Serves Lowest Income Residents (60 Points)

Points will not be awarded in this category for developments applying in the Preservation Set-Aside.

Tax-exempt bond financed developments are allowed to score points.

Applications will be allowed to score points in this category for new construction projects covered by operating or rental subsidies.

**Developments using committed project based vouchers or other rental subsidies as "50% CMI equivalents" for the calculation below. These units are to be reflected as "60% CMI units" on the Unit Mix page.*

WHEDA will award points to developments with a minimum percentage of units reserved for households with incomes at 50% or less of county median income. The market study must show there is a sufficient market for the target population.

Total Units for Development				
CMI set-aside Percentage	Number of Units @ CMI	Percentage of Total	Multiply Percent by Factor	Total Points
50%		%	X 0.86 =	
40%		%	X 1.07 =	
30% or lower		%	X 1.29 =	

Note to Applicants: The unit mix stated in the application, and the unit mix for which points are taken above, will be reflected in the eventual Land Use Restriction Agreement for the property.

6. Integrated Supportive Housing (20 Points)

Notes:

- Supportive Housing Set-Aside applications cannot score points in this category.
- Points will be awarded to developments intending to provide supportive services to veterans, individuals, and to families who may require access to supportive services to maintain housing.
- No more than 25% of units may be targeted to residents with disabilities.

Score 0.75 points for every percentage point of targeted housing in the development as a whole, up to 15 points. Points are rounded down. Common space manager units should not be included in the total unit count.

Number of Targeted Units		
Total Units		= XX %
	X 0.75	= XX Points

5 Point Bonus

Check here if some or all of the supportive services will be designed to address the needs of Veterans. The applicant must submit a signed MOU with a County or Tribal Veterans Service Office or a Veteran-specific Service Provider. The MOU must describe a referral and outreach system to connect potential Veteran residents with local or State Veteran-specific services and resources

In order to score points in this category the applicant must:

1. Provide any combination of 30% CMI LIHTC units and rental subsidy assistance for the targeted units. If rental subsidies, applicant must submit firm commitments for the targeted number of units.

Example: A 24 unit development with 4 units of either 30% LIHTC units or rental assistance would score 12.0 points. $(4/24 = 16.67\% \times 0.75 = 12.5)$.

Examples of allowable rental assistance include: Project-based Section 8 HAP or vouchers, operating subsidy, or capitalized operating fund or other rental subsidy assistance provided by a public housing authority or other government entity.

2. Provide a signed Appendix S Certification that the owner will cooperate with WI Department of Health Services (WIDHS) to find qualifying residents for the targeted units.

7. Rehab/Neighborhood Stabilization (25 Points)

NOTE:

- Projects scoring points in this category cannot score points in Category 13.
- Supportive Housing Set-Aside applications cannot score points in this category.

Points will be awarded to applications which propose acquisition and rehab of existing single family, duplex or fourplex housing as part of a targeted, city-supported plan to stabilize neighborhoods due to vacant properties and/or foreclosure, or existing tribal housing.

WHEDA will limit the number of Rehab/Neighborhood Stabilization awards to one per year in any city, and no more than one to any developer.

Requirements:

- City or tribal support letter including 1) description of overall neighborhood plan, 2) details of financial support and 3) support for proposed property clustering.
- Minimum 24 units.
- Minimum \$25,000 per unit of hard cost rehab. Hard cost rehab is defined as the Subtotal: New Construction/Rehabilitation on the Project Cost and Credit Calculation page, less Construction of New Buildings
- New Construction allowed only if building(s) will be demolished or have been demolished and is replacing like housing (no additional units). Such new construction is limited to 50% of total units
- An application's aggregate occupied units shall be automatically assumed by WHEDA to have a maximum 85% applicable fraction (i.e. assumed to have 15% over income households) unless the applicant provides rent rolls, certifications, or other information sufficient for WHEDA to determine that a higher applicable fraction will not result in the displacement of current residents. Aggregate unoccupied units may be assumed to be 100% income qualifying.
- Applications must demonstrate a year one pro forma rent increase of no more than five percent (5%) for any occupied rental units. Provide current rent schedule and explanation.
- Must show property clustering no greater than one-half (1/2) mile radius for non-tribal locations. Proposed clustering must be supported by city letter.
- Must show financial support minimum 5% of total development cost by the local government and/or private institutions or foundations.
- Unit mix may include single family homes, duplexes, triplexes or fourplexes but not less than 50% of the total units must be single family homes
- Application operating expenses must reflect annual replacement reserve deposit of \$400/unit minimum.

Reminder: Applicants should provide a plan addressing any proposed temporary relocation of residents. The plan should meet the standards established by the federal Uniform Relocation Act (URA). WHEDA prohibits permanent displacement of residents, including those whose incomes are known to, or are estimated to, exceed tax credit maximums. WHEDA may require the reduction of applicable fraction in tax credit awards to avoid displacement of existing residents.

WHEDA requires LIHTC applications in excess of \$850,000 to score points in the Credit Usage category (scoring category 13). However, applications receiving points in category 7 are not allowed to score points in category 13. For those LIHTC applications in excess of \$850,000 that receive points in scoring category 7, the LIHTCs must be at an amount that would score points in category 13.

8. Universal Design (18 Points)

All items must be certified to by an architect and attached to the initial application. Incorporated items must meet current code(s) in force for the year of the LIHTC application, complying with all Federal, State, Local and Municipal laws, codes, rules, ordinances, and regulations as they relate to the specific project.

The current building code for the State of Wisconsin is the 2009 International Building Code and the referenced standard for accessibility is ICC/ANSI A117.1-2003. References to section numbers within Universal Design are sections numbers from ICC/ANSI A117.1-2003. For complete understanding of the referenced sections, it is strongly recommended that a hard copy of ICC/ANSI A117.1-2003 be purchased from webstore.ansi.org or may be viewed online at no cost at www.publicecodes.cyberregs.com/icc/ansi/2003cc/a117p1/index.htm.

ANSI Intent Statements have been provided to give brief summaries of referenced section numbers but do not replace actual language found in ICC/ANSI A117.1-2003.

Common Area Features

Check box next to all that apply

Check Box	Points	Feature
	3	<p>Hand rails: In elderly housing only, install handrails on both sides of common hallways at all wall sections 4'0" or more in length uninterrupted by door or window openings. Handrails shall meet the requirements of Sections 505.4 through 505.9.</p> <ul style="list-style-type: none"> • Cottage style, townhouse, duplex, and single family style are not eligible for handrail points. <p><i>ANSI Intent Statement: Referenced sections specify requirements such as installed height, handrail profile, handrail clearances that comply with accessibility standards for commercial building handrails</i></p>
	3	<p>Automatic Door Openers: Provide automatic door openers at main accessible entrances to all main buildings, including entrances from accessible parking areas, per Section 404.3.</p> <p><i>ANSI Intent Statement: Doors with automatic openers are intended for individuals with mobility impairments and therefore must be designed to additional accessibility guidelines such as 32" clear opening, maneuvering clearances at either side of door, low profile threshold and control switches located beyond the arc of the door swing.</i></p>
	2	<p>Accessible Signage: Provide accessible signage for all common rooms and dwelling unit entries with visual characters per Section 703.2 and Braille characters per Section 703.4. If possible, unit entry signage shall be mounted 60" maximum above the floor to the top of the signage and located on the wall adjacent to the latch side of the door. The accessible signage requirement applies to all dwelling unit entries including units accessed by an exterior entrance such as a townhome.</p> <p><i>ANSI Intent Statement: Accessible signage follows guidelines that permit immediately recognizable information to visually impaired residents and/or visitors. These sections identify standards for text heights, text width, text contrast, sign mounting height and braille guidelines.</i></p>
	2	<p>Accessible Public Bathroom: Provide accessible public bathroom adjacent to public gathering area. This common area toilet shall have clearances that meet the requirements of Section 603.</p> <p><i>ANSI Intent Statement: The public bathroom shall follow accessibility standards for commercial buildings as the bathroom is located in a public area. The bathroom contains accessibility features such as turning space, plumbing fixture clear floor spaces, plumbing fixture heights and grab bar installation.</i></p>

**2017 Low Income Housing Tax Credit Program
Self-Scoring Exhibit**



Unit Features- Minimum of 20% of units, unless otherwise indicated
Check box next to all that apply

Check Box	Points	Feature
	3	<p>Provide a circular or T-shaped turning space per Section 304 in kitchen(s) and accessible floor level bathroom(s). Turning space shall be outside the door swing in bathrooms unless a 30" x 48" clear floor space is provided within the room beyond the arc of the door swing per Section 603.2.3 Exception 2. Sinks/vanities shall meet the requirements of Section 1003.12.4 including a height of 34" maximum above the floor with a clear floor space for forward approach.</p> <p><i>ANSI Intent Statement: Circular and T-shaped turning spaces are an invisible but useful feature of rooms used by individuals with mobility impairments. The turning space is allowed within the door swing arc in bathrooms as this room is assumed to have single occupancy. Section 1003.12.4 dictates a higher level of accessibility features at the sink because it requires forward approach which includes knee and toe clearances. To obtain these clearances, either a wall mounted sink or vanity with removable cabinets can be provided. If a removable cabinet is provided, floor and wall finishes shall extend beneath the cabinet and the removal of the cabinet shall occur without modifications of the sink.</i></p>
	3	<p>Provide standard roll-in type shower compartment per Section 608.2.2. A two inch (2") maximum raised curb is acceptable.</p> <p>Minimum 5% of total development units.</p> <p>Multi-story units will not receive these points unless:</p> <ol style="list-style-type: none"> 1) a sample floor plan is submitted to show this feature is located on an accessible floor level, AND 2) at least one bedroom is located on this accessible level floor 3) an alternative is to provide single story building(s) with units incorporating this feature <p><i>ANSI Intent Statement: A standard roll-in type shower compartments is a minimum of 30" in depth and minimum of 60" in width with shower seat on one end, shower controls on back wall adjacent to shower seat and grab bars provided on back wall and opposite the shower seat. The 2" curb language does not appear in ANSI but is allowed by this point due to the likelihood of water spilling into the bathroom on low threshold type showers.</i></p>
	2	<p>On accessible floor levels, all closet doors shall have a clear floor space of 30" x 48" minimum to allow either forward or parallel approach by wheelchair. Doors to closets that are more than 18" in depth shall provide at least 32" nominal clear opening.</p>
	2	<p>Bottom edge of mirror at all accessible floor level bathroom sink/vanities to be 40" maximum above the floor. If medicine cabinet is provided in addition to a mirror, then bottom edge shelf on the cabinet to be 44" maximum above the floor.</p>
	3	<p>All interior doors intended for user passage shall comply with Section 1003.5, which includes maneuvering clearances, thresholds, clear width, level hardware, etc.</p> <p><i>ANSI Intent Statement: The primary entrance door and other doors intended for user passage must incorporate accessibility features. It is important to avoid improperly designed door openings that do not maintain an accessible route throughout the dwelling unit. Common design flaws include a distance less than 32" between a door opened 90 degrees and the door stop, doors not maintaining proper pull or push side maneuvering clearances or the door hardware not being a lever type. The maneuvering clearances at either side of the door determined by direction of travel and are diagramed at Figure 404.2.3.1.</i></p>
	3	<p>Garbage disposal switch, range hood controls, and electrical receptacles shall meet the requirements of Section 309. At each section of countertop uninterrupted by a sink or appliance; as long as one accessible electrical receptacle is provided then other non-accessible receptacles may also be provided.</p> <p><i>ANSI Intent Statement: Section 309 states that operable parts must be located within one of the reach ranges specified in Section 308. Within a kitchen, the obstructed side reach is the most often scenario encountered by a wheel chair user and is defined as the ability to reach a maximum of 24" over an object with the maximum height of 34" to a surface a maximum of 46"</i></p>

**2017 Low Income Housing Tax Credit Program
Self-Scoring Exhibit**



		<i>high on the far side. A common solution to bring operable parts such as switches and receptacles closer to the user is to have these items mounted on the face of the kitchen cabinets. Another available solution would be extending the operable parts such as switches and receptacles through a full height backsplash which maintains the maximum 24" distance from the face of backsplash to the lip of the counter.</i>
	3	Provide minimum one accessible work surface that meets all requirements of Section 1003.12.3 including top of counter at 34" above the floor, minimum 30" wide, and a clear floor space for forward approach. <i>ANSI Intent Statement: The work surface is a kitchen design feature that would allow a wheelchair user to work at the counter with their knees beneath the working surface. Removable casework is often provided beneath the work surface but the floor and wall finishes shall extend beneath the cabinet and the removal of the cabinet shall occur without modifications to the work surface. There must be a 30" wide opening beneath the work surface when the removable cabinet is removed to allow for forward approach below the work surface.</i>
	3	Entrance doors to the unit shall comply with Section 404 including delayed action closers, maneuvering clearances, low profile threshold, etc. A screen door or storm door may be added in addition to the entrance door with installation method to allow for management to remove screen door or storm door at tenant request. <i>ANSI Intent Statement: The entrance door to the dwelling unit requires additional maneuvering clearances because a closer and latch are provided at this door. The maneuvering clearances at the interior and exterior side of the door are determined by direction of travel and are diagramed at Figure 404.2.3.1.</i>
	2	Where operable windows are provided, provide at least one window in each sleeping, living, and dining space complying with all of Section 309 including the following: are easily grasped with one hand without tight grasping, pinching, or twisting of the wrist; and are located no more than 48" above the floor. Provide 30" x 48" clear floor space for forward or parallel approach centered on the window. Minimum 10% of total development units. <i>ANSI Intent Statement: Section 309 provides accessible design guidance on operable parts. This section is not specific to describing operable windows but has been applied to the window controls for the purpose of this point. Window locking mechanism to be within reach range and crank window must be ADA compliant style.</i>
	2	Carpet shall have 1/2" maximum pile and meet all requirements of Section 302.2. <i>ANSI Intent Statement: Flooring properties are an important factor to those with mobility impairments as they should not restrict movement of a wheelchair or provide tripping hazards at flooring transitions. Carpet pile is limited to 1/2 inch maximum in height. Transitions over 1/4 inch in height and less than 1/2 inch shall be beveled.</i>
	1	All unit light switches shall be Rocker type light switches.

Items below only available for Acquisition/Rehab and Preservation projects – points for the following items will not be awarded to Adaptive Reuse projects

Minimum of 20% of developments total units, unless otherwise indicated

Check Box	Points	Feature
	2	Provide all bathtubs/showers with offset controls and a 30" x 48" clear floor space for parallel approach. Where the centerline of the controls is between 18" and 9" from the open face of the bathtub/shower compartment, the clear floor space in front of the fixture shall extend at least 9" beyond the control wall. Where the centerline of the controls is between 9" and 0" from the open face of the bathtub/shower compartment, the clear floor space in front of the fixture shall extend at least 5" beyond the control wall.
	3	Electrical outlets and cable/data outputs set to a minimum height 18" above the floor
	3	Thermostats, primary electrical box and light switches set to a maximum height of 48" above the floor.

**2017 Low Income Housing Tax Credit Program
Self-Scoring Exhibit**



1	Water supply and drain pipes under lavatories and sinks shall be insulated or otherwise configured to protect against contact.
1	<p>100% visitable units. Provide an accessible route from accessible parking stalls to all dwelling units. Accessible routes shall meet all requirements of Section 402 including Section 404 for accessible doors. The living room, kitchen and minimum of one bathroom (with a minimum of a toilet and sink) must be on the accessible route from the unit entry. Bathroom shall meet the requirements of Sections 1004.11.</p> <p><i>ANSI Intent Statement: An accessible route is defined by walking surfaces not steeper than 1:20 ramps, curb ramps excluding flared sides, elevators and platform lift. Once the resident or visitor arrives at the dwelling unit, the unit doorway and path connecting the living room, kitchen and one bathroom shall have proper maneuvering clearances on either side of the doorway. The kitchen is required to have turning space but is not required to have other accessibility features such as 34" high counters or accessible work spaces by this point item. Section 1004.11 is lengthy and should be read carefully as there are two bathroom options that may not be intermixed. Under either option turning space, fixture clear floor spaces, reinforcement for future grab bars must be provided</i></p>
1	<p>Toilets in units shall have clearances that meet requirements of Section 1004.11.3.1.2.1, 1004.11.3.1.2.2, or 1004.11.3.1.2.3.</p> <p><i>ANSI Intent Statement: All sections referenced are describing the various clearance options at the toilet and are diagramed at Figure 1004.11.3.1.2 for easier reference. Section 1004.11.3.1.2.1 describes a parallel approach measuring 56" deep by 48" wide. Section 1004.11.3.1.2.2 describes a forward approach measuring 66" deep by 48" wide. Section 1004.11.3.1.2.3 describes a parallel or forward approach measuring 56" deep by 60" wide.</i></p>
3	<p>Low-profile thresholds - All changes in level within common areas and in dwelling units to be 1/4" maximum vertical or 1/2" maximum beveled at 1:2 per Sections 303.2 and 303.3.</p> <p><i>ANSI Intent Statement: Transitions at doorways or flooring surfaces present tripping hazards. Figure 303.3 provides a good diagram for the acceptable threshold profiles.</i></p>
2	<p>Provide reinforcement for the future installation of grab bars at toilets, bathtubs, and shower compartments per Section 1003.11.4. If walls are not being opened up to allow for installment of the reinforcement, a face plate installation for the toilet grab bar(s) would be an acceptable substitution. For bathtubs and shower compartments if there is not existing reinforcement in place within the wall structure, these features must be replaced with new compartments that have the reinforcement included.</p> <p><i>ANSI Intent Statement: Reinforcement for installation of grab bars allows a resident an opportunity for safety within the bathroom while not incurring the initial cost of installing grab bars and shower seats in every dwelling unit.</i></p>
2	Bathroom/shower compartment permanently lined with non-skid surface or pattern covering 75% of floor.

Sum of Checked Items	Maximum Total Points
34 and Over	18
27-33	14
21-26	10
14-20	6
6-13	3

9. Financial Participation (25 Points)

NOTE:

- Projects submitting applications in the Preservation Set-Aside will only be allowed to score points on new unaffiliated financing.

Points will be awarded for various types of unaffiliated financial participation or cost reductions, which specifically benefit this development, that are secured by the applicant. Funding sources that will be eligible for Financial Participation points include federal, state or local government loans, equity from sale of federal or state historic tax credits, assistance from the Federal Home Loan Bank, tax-exempt bond financing (only on 4% tax credit applications), or public housing authorities. Financial participation or cost reductions must be used for costs identified in Project Budget and Credit Calculation page in the LIHTC application.

To be eligible for Financial Participation points, loans will be required to be (a) at or below the Applicable Federal Rate or (b) subordinate, with repayment from available cash flow.

The maximum number of points that will be available for Historic Tax Credit Equity will be limited to 15 points.

Eligible cost reductions must be provided by local government.

There are two options for points:

1. Points will be awarded by dividing the financial participation amount by the total development costs. Score one (1) point for every percentage point of financial participation.

and/or

2. Points will be awarded by dividing the dollar amount of qualified cost reductions by the total development costs plus the cost reductions. Score one (1) point for every percentage point of Cost Reduction.

Examples of the types of financial participation and/or cost reductions include, but are not limited to, the following:

- The local government funds on-site project costs by providing HOME, CDBG funds or other financial resources in the form of loans, grants, or a combination thereof.
- The local government creates a quantifiable reduction of on-site project development costs specifically for this project. Examples of quantifiable reduction of on-site development costs include:
 - a) waiver of water or sewer fees, waiver of building permit fees or other government development fees, waiver of impact fees, donation or waiver of project specific assessment or infrastructure costs, reduction of purchase price for land or buildings as compared to assessed or appraised value, or
 - b) demolition and removal of existing structures at no/reduced cost. Note: If using demolition of existing structures for points, then no points for reduction of purchase price will be included.
- New or reamortized USDA RD Section 515 financing in the form of a loan
- Cash donations or grants from any of the above named entities.
- Tax-exempt bond financing
- TIF financing in form of a grant or loan. Provide copy of Developer Agreement or Common Council approval.

Note: A Payment in Lieu of Taxes (PILOT) agreement with a Local Government does not qualify for points in this category.

Guidelines under which points will be awarded:

To receive points in this category, written, fully executed, conditional funding commitments must be submitted with the application to document any points claimed.

All funding commitments must include the type of funding (grant/loan or cash donation), amounts, terms and conditions of all funding. Commitments that include the terms "may" or "intend" will not be acceptable for scoring purposes of this category.

- A. Funding or project cost reductions must be documented in the form of a written commitment.
- B. Funding can be in the form of a loan, grant, or cash donation, or municipal cost reduction.

**2017 Low Income Housing Tax Credit Program
Self-Scoring Exhibit**



- C. Amortizing loans must have these characteristics:
 - 1. Minimum term of ten (10) years and fully amortizing. Must be at a rate equal to, or less than, the Long Term Applicable Federal Rate (compounded annually).
 - 2. Origination fees may not exceed 2.5%.
 - 3. Bifurcated loans must use blended rate to meet long term applicable federal rate (compounded annually) criteria.
- D. Subordinate loans with payment from available cash flow or tax increments, will be eligible for points in this category
- E. All loans, grants or cash donations must be included as a source of funding for the development on the application. If cash donations or grant funding will be paid in multiple years, only the initial year funding will be included in the point scoring.
- F. All local government contributions which provide a quantifiable reduction of on-site development costs must be identified in the application and be linked to this affordable housing proposal. The point calculation for "Qualified Cost Reductions" shall be: cost reduction divided by (cost reduction plus application total development cost).
- G. "Local government" includes the city, town, village or county where the proposed development will be located.
- H. Applicants must provide a letter from the appropriate representative of the Local Government certifying the local government's contribution and/or actions that create a quantifiable reduction of on-site development cost. The appropriate representative of the local government would include the person or person(s) that have the authority to sign such a commitment. That person may include the mayor, common council president, or department head, etc. The letter must clearly show the types, amounts, value or terms and conditions of such contributions and/or quantifiable reductions.
- I. Commitments may contain conditions, but only within control or based upon the performance of the borrower, not the local government or other provider.
- J. If claiming Historic Tax Credit, submit a) written evidence that historic designation (Part I) has been applied for, or that the building is already deemed historic, and b) letter of interest by investor, and c) detailed calculation of the credit and equity amounts. Points are calculated on the lower of the Credit, or the equity from sale of the credit. The letter must acknowledge that the price of the State credit reflects the net price after any income tax liability incurred from the sale of the credit. A maximum of 15 Financial Participation points for Historic Tax Credits.
- K. Tax Increment Financing (TIF)
 - must submit municipal approval of TIF
 - If developer financed remit copy of firm commitment from Financial Institution mirroring terms of municipality

Qualified Financial Participation

Dollar Amount of Qualified Financial Participation	
Application Total Development Cost	/
Percentage Points	=

Cost Reduction

Dollar Amount of Qualified Cost Reductions	
Cost Reductions + Total Development Cost	/
Percentage Points	=

10. Eventual Resident Ownership (3 points)

NOTE:

- Supportive Housing Set-Aside applications cannot score points in this category
- Points are limited to developments designated as BOTH (1) family and (2) single family detached style construction.

100% of the development is intended for eventual resident ownership. A Resident Homeownership Plan must be submitted with initial application. The plan must incorporate an exit strategy, including how units will be marketed and sold to the eventual resident owner, as well as detailing the provision of services including home ownership education, training, and down payment assistance.

The Resident Homeownership plan must include the following:

- Anticipated tenant qualifications
- Pre-purchase homeownership and financial counseling services to be provided
- Estimated timelines for transition to ownership
- Estimated affordable purchase price of units – Show methodology. Use WHEDA's Affordable purchase price limits
- Detail any down payment assistance that will be offered to the residents – for example, will any part of the monthly rent be reserved for down payment assistance?

Release of the LURA after the expiration of the compliance period will be subject to WHEDA's review at that time regarding the above, as well as tenant protection, continued affordability, and review of a Capital Needs Assessment (CNA).

Failure to provide any required element of the Resident Homeownership Plan will result in no points.

11. Development Team (12 Points)

For informational purposes only – scoring will be completed by WHEDA. See Appendix P for Development Team scoring definitions.

Note: Developer scoring will be done based on scores of the Primary Developer and the Co-Developer (if any). WHEDA will use the higher of the following:

- The Primary Developer individually
- The average scores of the Primary Developer and Co-Developer

Development Team

- A. Successful completion of LIHTC properties (as lead developer)
 - a. Four or more properties in Wisconsin or more than 10 LIHTC properties in all states (2)
 - b. Two or more properties in Wisconsin or more than five LIHTC properties in all states (1)
- B. Years of LIHTC and multifamily experience
 - a. Six years of development experience and four years of LIHTC experience (2)
 - b. Four years of development experience and three years of LIHTC experience (1)
- C. Performance of LIHTC properties (minimum of three properties or 100 units as lead developer)
 - a. Average physical occupancy above 96% during the past three years (3)
 - b. Average physical occupancy above 94% during the past three years (2)
 - c. Average physical occupancy above 92% during the past three years (1)
- D. WHEDA evaluation of capacity, delivery of prior LIHTC properties and timely & accurate completion of prior LIHTC applications and awards (3 points)

Development team members (maximum of 2 points)

- A. 2 points will be awarded for applications that include a Nonprofit organizations, acting as Developer and an Owner, that meets the requirements for applicants in the Nonprofit Set-Aside
- B. One point will be awarded for applications that include an organization, acting as lead Developer and an Owner, that has participated in four or fewer LIHTC properties as a lead developer or owner

Co-developers for properties owned by Public Housing Authorities or Tribal Housing Authorities will not be required to have an ownership role in the property.

WHEDA will continue to reserve the right to deduct up to 15 points for non-compliance with a previous LIHTC award's representation of scope, support services, design, energy efficiency, amenities, score, certifications, or nonpayment of fees.

12. Readiness to Proceed (12 Points)

Zoning Status: Permissive zoning in place for the type of development proposed.

- o Final plan approval not required.

If the zoning for a property requires that the site also contain commercial space, applicant to provide documentation describing how the commercial space will be constructed and financed.

**2017 Low Income Housing Tax Credit Program
Self-Scoring Exhibit**



13. Credit Usage (30 Points maximum)

NOTE: The application cannot score points in this category if points are also requested in Category 7 - Rehabilitation/Neighborhood Stabilization

WHEDA will award points to developments requesting relatively fewer credits per low income unit produced, as calculated in Application One. For properties containing a mix of Acquisition/Rehab units and New Construction or Adaptive Reuse units, a Credit Usage score will be calculated for the for properties the Acquisition/Rehab units and New Construction or Adaptive Reuse units, with the lessor of the two being used as the application score for this category.

Applications that include a credit request in excess of an amount that would qualify for Credit Usage points will be limited to \$850,000.

For properties in a Qualified Census Tract, which also includes a job/skill training center or employment counseling center (or similar facilities) as a Community Service Facility, WHEDA will exclude the credits attributable to the Community Service Facilities from the Credit Usage calculation. Applicants should include an attachment that clearly identifies the costs, basis and LIHTCs attributable to the Community Service Facilities. WHEDA expects that the per-square-foot cost of the Community Service Facilities will be significantly below the per-square-foot costs for the residential portion of the property. Include an executed Memorandum of Understanding between the property owner and the operator of the Community Service Facility which describes the use of the property, operational expectations, etc.

Total LIHTCs Requested	\$
Less LIHTCs Attributable to Community Service Facilities	\$
Equals LIHTCs Attributable to Residential Areas	\$
Total Building Square Footage	
Total Community Service Facilities Square Footage	
Credit Allocated to New Construction and Adaptive Reuse Units	\$
Plus Credit Allocated to Acquisition/Rehab Units	\$
Equals Total Credit Allocated to Residential Areas	\$

NOTE: The unit mix reflected in this scoring category must match the Unit Mix page of the application. The credit per-unit calculation for the proposed unit mix will be adjusted to reflect the bedroom sizes of the low income unit mixes. The weighted credit per-unit value will be used to determine points.

Weighting for Credit Usage Calculation	
Studios	0.73
1 BR	0.85
2 BR	1.00
3 BR	1.20
4+ BR	1.38

**2017 Low Income Housing Tax Credit Program
Self-Scoring Exhibit**



New Construction and Adaptive Reuse		
Credit per Unit		Points
Dane County and Metropolitan Milwaukee *	Other Areas	
At or below \$12,470	At or below \$11,990	30
\$12,471 to \$13,020	\$11,991 to \$12,520	25
\$13,021 to \$13,570	\$12,521 to \$13,045	21
\$13,571 to \$14,115	\$13,046 to \$13,575	17
\$14,116 to \$14,665	\$13,576 to \$14,100	13
\$14,666 to \$15,215	\$14,101 to \$14,630	10
\$15,216 to \$15,765	\$14,631 to \$15,160	7
\$15,766 to \$16,315	\$15,161 to \$15,690	4
Over \$16,315	Over \$15,690	0

Acquisition/Rehab		
Credit per Unit		Points
Dane County and Metropolitan Milwaukee *	Other Areas	
At or below \$6,835	At or below \$6,570	20
\$6,836 to \$7,420	\$6,571 to \$7,135	16
\$7,421 to \$8,010	\$7,136 to \$7,700	12
\$8,011 to \$8,590	\$7,701 to \$8,260	8
\$8,591 to \$9,180	\$8,261 to \$8,825	4
Over \$9,180	Over \$8,825	0

*Milwaukee, Waukesha, Ozaukee and Washington Counties

The table below includes the minimum unit sizes for LIHTC properties in the 2017 cycle. Applications submitted in the Supportive Housing Set-Aside are not required to meet the minimum units sizes noted below.

Minimum Unit Sizes (Square Feet)	
Unit Type	Minimum SF
Studios	400
1-BR	575
2-BR	825
3-BR	1,100
4+ BR	1,200

14. Opportunity Zones (25 Points)

Up to five points will be awarded for each the items below (limited to a maximum of 15 points). A list of census tracts/school districts that qualify for Median Income, Unemployment, DPI Accountability Score and High Needs Area points can be found in Appendix R.

- A. Median Income in the Census Tract
- B. Unemployment Rate in the Census Tract
- C. Located in a school district in the top 25% of the Wisconsin Department of Public Instruction’s most recent Overall Accountability Score
- D. Located on Federally-designated Tribal Lands, in an area identified by WHEDA as a ‘High Need’ area, or successful respondent to a city or local competitive RFP/RFQ.
 - o RFP/RFQ Notes:
 - Applicants must demonstrate they are the successful respondent to a city or local competitive RFP/RFQ to develop a project on publicly-controlled land within the RFP/RFQ specified timeframe (must meet LIHTC time requirements for the credit allocation). There cannot be an identity of interest between the issuer and awardee. Applicants must submit a copy of the RFP/RFQ along with the award notification from the issuer.
 - Maximum of two RFPs/RFQs per municipality. If a municipality has more than two RFP/RFQ selections, only the two highest scoring WHEDA applications will receive these points
 - o For those applications that did not receive credit in 2016, and are being resubmitted in 2017 – High Need Areas points will be awarded in 2017 if those points were awarded in 2016.

Access to services and amenities (maximum of 10 points)

- A. Properties will receive one point for proximity to key services and amenities
 - o Sites meeting WHEDA’s Rural Set-Aside definition: points will be awarded for amenities and services within 2.0 miles
 - o All other areas of the state: points will be awarded for amenities and services within 1.0 mile

Item	Senior	Family/Supportive
Full Service Grocery Store – stores providing fresh meat, produce and dairy ¹ (2 points)	X	X
Public Elementary, Middle or High School		X
Senior Center (2 points)	X	
Full Service Medical Clinic or Hospital ²	X	X
Library	X	X
Public park with playground equipment or athletic facilities, or hiking/biking trail	X	X
Job-Training Facility, Community College or Continuing Education Programs	X	X
<i>On-site services and amenities</i>		
In-unit internet at no cost to residents (2 points)	X	X
On-site community room dedicated for residents	X	X

¹ A convenience store does not meet the definition of full service grocery store

² A specialty medical clinic (such as podiatrist or ophthalmologist), diagnostic lab, nursing home or hospice facility does not meet the definition of full service medical clinic or hospital