2017-2018 LOW-INCOME HOUSING TAX CREDIT (LIHTC) PROGRAM

QUALIFIED ALLOCATION PLAN (QAP) AND PROCEDURES

OVERVIEW SESSION

SEPTEMBER 7, 2017
QAP & PROCEDURES
TERRY NASH, CHFA
Background

CHFA’s Board of Directors Task Force determined no changes would be made to the prior year QAP

June 2017
• Public Hearing conducted as required prior to Governor’s signature approving the QAP
• Board approved QAP and LIHTC Procedures (no changes)

July 2017
• Governor approved the 2017 QAP
Classifications

Two Classifications only: 50 / 50 split
- State and Federal Public Housing
- General Class

Credits are allocated subject to satisfying the non-profit set-aside requirement.
Points Categories

• Total Points in QAP unchanged at **104 Points**

• Points distribution and weights among categories unchanged

• Points categories unchanged
Scoring

Total Points = 104

<table>
<thead>
<tr>
<th>Priority</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rental Affordability</td>
<td>33 points</td>
</tr>
<tr>
<td>Financial Efficiency &amp; Sustainability</td>
<td>26 points</td>
</tr>
<tr>
<td>Municipal Commitment &amp; Impact</td>
<td>18 points</td>
</tr>
<tr>
<td>Opportunity Characteristics</td>
<td>14 points</td>
</tr>
<tr>
<td>Qualifications &amp; Experience</td>
<td>11 points</td>
</tr>
<tr>
<td>SSHP Developments – Additional Points</td>
<td>2 points</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>104 points</strong></td>
</tr>
</tbody>
</table>
Points Categories

• Rental Affordability - Promote housing that serves households earning <50% AMI and incentivizes deep income targeting

• Financial Efficiency & Sustainability - Incentivize cost effectiveness

• Municipal Commitment & Impact - Supports contribution to vibrant and resilient economies
Points Categories

• Opportunity Characteristics - Promotes diverse housing opportunities for families

• Qualifications & Experience - Recognizes experienced development team’s record

• State Sponsored Housing Portfolio – Addresses needs of state’s aging housing stock with additional points for eligible SSHP developments
OPPORTUNITY CHARACTERISTICS
JONATHAN CABRAL, CHFA
Opportunity Characteristics

Intended to encourage the development of housing in areas with:

• Comparatively lower poverty rates
• Community employment opportunities
• Access to community colleges
• Better school systems
Opportunity Characteristics

• Locational Guidemap provided for Applicant’s convenience
FINANCIAL EFFICIENCY, SUSTAINABILITY & PASSIVE HOUSE
CHARLES EMERSON, CHFA
## Cumulative Rating & Ranking Points for Financial Efficiency & Sustainability

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Effectiveness, Hard Cost (CHFA Cost Analysis Deviation +/- 0% to &lt; 5% or 5% to 10%)</td>
<td>3 or 6</td>
</tr>
<tr>
<td>90% Plans &amp; Specifications</td>
<td>3</td>
</tr>
<tr>
<td>Sustainable Design: Passive House Design</td>
<td>3</td>
</tr>
<tr>
<td>Sustainable Design: High-Performance Building Design for Minor/Moderate/Substantial Rehabs (Energy Reduction ≥ 33%) or Gut Rehabs/New Construction (HERS ≤ 52/Cost Savings ≥ 23% Over ASHRAE 90.1-2007 Standards)</td>
<td>2</td>
</tr>
<tr>
<td>Sustainable Design: Renewable Energy System (PV Providing ≥ 33% of Site Lighting Energy or ENERGY STAR-qualified Central Geothermal System)</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total Possible Points</strong></td>
<td>12 or 15</td>
</tr>
</tbody>
</table>
Passive House Design

• A pre-certification modeling analysis/output report through the Passive House Planning Package as developed by the Passive House Institute (PHI) or WUFI Passive by the Passive House Institute of the United States (PHIUS) prepared by Certified Passive House Consultant indicating compliance with PHI or PHIUS criteria, and all other data and documentation required for “Pre-Certification” by PHI or PHIUS

• Drawings/specs at 40% complete or greater, with detailed wall sections reflecting the proposed scope of Passive House design measures used in the modeling analysis/output report
Passive House Design

• A plan for the ongoing services by the CPHC Consultant of Record, and for third-party verification of all PHIUS+ requirements during construction, provided by PHIUS+ certified raters during construction. **Soft costs must be identified in the development budget.**

• A breakdown of clearly-identified extraordinary construction costs related to Passive House, High-Performance Building design and/or Renewable Energy Systems carried in the PCS and ETPB. **Adjustments will be made for extraordinary construction costs in the hard cost analysis.**
2016 Round - Passive House Lessons Learned

- 9 Applicants Claimed Passive House Points; 6 applicants were awarded points
- Letter from CPHC provided, but no PHIUS+ 2015 or PHPP model provided
- Letter, scope of Passive House measures and PHIUS+ 2015 model provided by CPHC, but Passive House measures not reflected in the drawings or specifications
- Breakdown of extraordinary construction costs clearly related to Passive House measures not provided
- Breakdown of soft costs carried in the development budget for ongoing services of the CPHC of Record, and/or for third-party PHIUS+ verification by PHIUS+ certified raters not provided

September 7, 2017
• Provide color-printed plan and wall section details, with continuous red-lined air barriers and blue-lined water barriers

• Provide color-printed isotherm and infrared plan and wall section details at key intersections of slabs, walls and roofs and façade projections
Red-lined, Blue-lined a& Isotherm/Infrared Plan/Wall Section Details
LIHTC PROGRAM UNDERWRITING GUIDANCE
DEBBIE ALTER & MAJ KABIR, CHFA
CHFA Taxable Bond Financing

• CHFA is offering taxable bond financing for use with the 2017 9% LIHTC Round
• CHFA will use its standard construction to permanent financing structure with two promissory notes: a construction note and a permanent note
• Applications will be accepted via e-mail with reduced documentation
• Terms and a list of required documents may be found on the CHFA website
CHFA Taxable Bond Financing

• Applicants are encouraged to explore all financing options
• Multiple letters of financing interest will be accepted for review
• The use of CHFA financing will not affect the review or scoring of a 9% LIHTC application
• Applications are due no later than 5:00 PM on September 27, 2017
Relevant Resources

- 2017 LIHTC Glossary of Terms
- 2017 LIHTC Guideline
- 2017 Multifamily Rental Housing Program Guideline - Underwriting Standards
- 2017 Opportunity Characteristics Guideline
- 2017 Supportive Housing Guideline
- LIHTC Procedures
Process

- Applications, architectural drawings, and specifications for the 2017 9% LIHTC round are due no later than **4:00 pm on November 1, 2017**

- Submit one hard copy of plans and specs by the deadline to CHFA at 999 West Street in Rocky Hill

- If DOH funding is requested, submit one hard copy plans and specs to DOH by the application deadline as well
Process

• Threshold items must be submitted for an application to be considered

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

• CHFA reserves the right to request clarification on underwriting submissions

• CHFA will not seek clarification on points related submissions

• Award announcements anticipated at March 2018 CHFA Board meeting
Application Fees

Financing (Taxable Bonds):
• For-profit applicants: $2,500
• Not-for profit applicants: $1,250
Non-refundable fee to be paid at submission of a CHFA financing application.

LIHTC:
• For-profit applicants: $1,000
• For-profit applicants (less than 20-units): $500
• Not-for profit applicants: $250
Non-refundable fee to be paid at submission of 9% LIHTC application

See Multifamily Underwriting Standards Summary
Underwriting Standards

• Trending: 2% Income
  3% Expenses

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

• 1.15 Debt Service Coverage Ratio

• Developer Allowance/Fee Up to 15% TDC (sliding scale)

See Multifamily Underwriting Standards Summary
Helpful Hints – Underwriting

• Credible financing plan
  – Correct financing terms in Sources and Uses
  – Two (2) letters of interest from separate tax credit syndicators are required

• Municipal Commitments should be firm and quantifiable over 20 years; see Glossary for detailed information
  – Tax Abatements or PILOTs must be already approved by the municipality
  – Land contribution or sale requires an appraisal

September 7, 2017
Helpful Hints - Underwriting

• Material participation; see Glossary
  – Evidence of material participation by the co-sponsor(s) will be required for points items

• Developer resources; see Glossary
Must be a permanent financing source
  – Cash equity requires third-party verification
  – Land contribution or sale requires an appraisal
  – CHFA may adjust the land value for any negative conditions
Helpful Hints – Underwriting

• Supportive service budgets must include evidence of funding

• Capacity of Development Team Members; see Glossary

• The following development team members must complete the Development Team Member Current Assignments form that is currently available on the CHFA homepage
  – Applicant
  – General Partner
  – Developer
  – Co-sponsor
  – Architect
  – Development Consultant
  – Property Manager
  – Supportive Service Provider

September 7, 2017
# CHFA DON CONSOLIDATED APPLICATION SUPPLEMENT

## DEVELOPMENT TEAM MEMBER CURRENT ASSIGNMENTS

(To be completed by the Applicant, General Partner, Developer, Co-Sponsor, Architect, Development Consultant, General Contractor, Property Manager, and Supportive Service Provider)

<table>
<thead>
<tr>
<th>Development (Applicant)</th>
<th>Entity (Legal) Name:</th>
<th>Entity Role:</th>
<th>Entity Role (Specify):</th>
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Address:___________________

Website:___________________

Principal(s):___________________

Contact Person:___________________

Email Address:___________________

Telephone Number:___________________

<table>
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<tr>
<th>Project</th>
<th>Location</th>
<th>Project Status</th>
<th>Comments</th>
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</tbody>
</table>

For Service Providers only, if additional funding requests through CHFA/CHCPS are approved, will your current funding and staffing levels be sufficient to proceed? Please explain:

For the Property Manager only, please describe your current portfolio, and how any additional awards will impact it:
Lessons Learned – Technical Services

• Scope of work described in narrative should match information on drawings/specs/construction costs
• Exploded Trade Breakdown and Project Cost Summary
• Include Prevailing Wages or Federal Davis Bacon if applicable and DOL wage rate sheets
• General Requirements 9% max, OH&P 7% max
• Construction contingency typically 10%

September 7, 2017
Lessons Learned – Technical Services

• Architectural drawings/specifications should be labeled with the correct development name and address per the application

• No points awarded for 40% drawings/specs; only 90% and above are awarded points

• Any energy efficient measures should be included in drawings/specs and construction costs with appropriate documentation from the engineer

• Building Gross Square Footage etc. should be noted on architectural drawings in tabular format provided in ConApp
Lessons Learned – Technical Services

• Environmental abatement costs noted in reports should be included on the appropriate Environmental line item on PCS and ETPB

• If Phase I ESA recommends additional testing, this testing should be done, additional report included in application submission and all remediation costs included

• Radon testing is needed for existing buildings; for new construction, a radon mitigation system should be included in drawings/specs and construction costs
DEPARTMENT OF HOUSING
NICK LUNDEGREN
DOH Gap Funding

• Soft commitments up to $50M
• Approx. $25M total funding, incl. $5M for SSHP projects
• DOH soft commitments issued in accordance with DOH selection criteria (on DOH website)
• DOH review concurrent with CHFA application review
• Funding subject to appropriations

September 6, 2017
DOH Gap Funding: Soft Commitment Threshold

Minimum Criteria:
• Demonstrated Marketability
• Appropriate Location
• No Feasibility Issues
DOH Gap Funding Priorities

• Four Cascading Tiers

• Tier 1
  - High Opportunity or Local Revitalization Plan
  - $6M max and 33% or less of TDC

• Lower Tiers based on funding requested and % of TDC
  - Subsidy less than $4 - $6M
  - Subsidy less than 30% -33% of TDC

September 6, 2017
DOH RAP Commitments

No RAPs are available for the 2017 9% LIHTC Round
DEPARTMENT OF HOUSING
STEVE DILELLA
Coordinated Access Network

CAN Geography and Statewide CAN Contacts

Central CAN
- Berlin, Bristol, New Britain, Plainville, Southington

Fairfield County CAN
- Bethel, Bridgeport, Bridgewater, Brookfield, Cos Cob, Danbury, Darien, Easton, Fairfield, Greenwich, Monroe, New Canaan, New Fairfield, New Milford, Norwalk, Rye, Ridgefield, Roxbury, Sherman, Stratford, Stamford, Trumbull, Westport, Wilton

Greater Hartford CAN

Southeast CAN
- Bozrah, Colonie, East Lyme, Franklin, Griswold, Groton, Lebanon, Ledyard, Lisbon, Lyme, Middletown, Mystic, New London, North Stonington, Norwich, Old Lyme, Preston, Salem, Sprague, Stonington, Voluntown, Waterford

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

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

Northeast CAN

Waterbury/Litchfield County CAN

For questions about these CANs, contact
Kara Capobianco LCSW
kara.capobianco@ct.gov (860) 371-4282

For questions about any CAN, contact
Beau Anderson MPA
beau.anderson@ct.gov (860) 416-0552

For questions about these CANs, contact
Leigh Shields-Church LCSW
leigh.shields-church@ct.gov (860) 371-8578

September 7, 2017
Filling Homeless Special Population Units

The selection process has changed now that Coordinated Access has been implemented.

**Process Before Coordinated Access Networks**
- First-come, first-served waitlist
- Lottery-based waitlists
- Eligibility based on self-report of homelessness
- Eligibility not verified prior to being added onto the waitlist
- Households may be on waitlist for years

**Process With Coordinated Access Networks**
- No waitlist maintained for Homeless Special Populations
- Vacancies are reported to CAN by the property manager
- CAN will use BNL to identify most vulnerable household that meets eligibility requirements
- Service provider will assist client through lease up
Any project that receives bonus points for the homeless population **MUST** take referrals from the Coordinated Access Network
• Applicants should contact the SHPO immediately if an application for State Historic Tax Credits is contemplated as a component of a proposed development submitting in the 2017 9% LIHTC round

• Part I must be submitted with the ConApp for the 2017 9% LIHTC round

• Development applicants seeking State Historic Tax Credits must be fully ready to proceed
Where the Historic Rehabilitation Tax Credits Stand Today

• Over $19 million in state tax credits has been reserved for FY 2018

• The SHPO will likely reserve the entire allocation in the next two months

• Threats to the Federal Historic Tax Incentive exist in current tax reform proposals.
Moving Ahead

• The SHPO will continue to accept applications on a rolling basis, including the Part 3: Preliminary Certification and Request for Reservation of Tax Credit Application

• If the Part 3 application is approved, a commitment for a FY 2019 reservation will be provided; the Certificate will not be issued until the start of the next fiscal year

• The SHPO will only commit tax credits one year in advance of the current fiscal year

• The SHPO has added criteria to the ranking system already in place as part of the Part 3 application

• This is an effort to ensure that the limited amount of funds currently available will go to the projects that have demonstrated the highest level of project readiness.
Contact Information

Julie Carmelich, Historian
Email: julie.carmelich@ct.gov
Phone: 860.256.2762
Address: 1 Constitution Plaza, 2\textsuperscript{nd} Floor
    Hartford, CT 06103

\textbf{Starting September 18}
Phone: 860.500.2362
Address: 450 Columbus Boulevard, South Tower
    Hartford, CT 06103
Utility Incentives for Multifamily Energy Improvement and New Construction Projects
Energize Connecticut

▪ Energize Connecticut is a statewide branding initiative to help consumers save money and use clean, affordable energy

▪ A partnership of the Energy Efficiency Fund, the Connecticut Green Bank, Department of Energy and Environmental Protection (“DEEP”) and local electric and gas utilities

▪ Efficiency incentive programs funded through the Connecticut Energy Efficiency Fund
What We Offer

- **Comprehensive energy solutions** for market rate and income eligible multifamily properties
  - Financial incentives, rebates, and financing
  - Technical assistance and installation services
  - Owner and tenant education
Customer Benefits

▪ Reduce energy bills
▪ Reduce operations and maintenance costs
▪ Improve energy performance
▪ Improve tenant comfort
▪ Improve tenant satisfaction
Eligible Multifamily Property Types

- Any multifamily property with 5+ units
- Not-for-profit, market rate and income eligible customers, including:
  - Private owners / landlords
  - Housing authorities
  - Housing associations
Commonly Incentivized Measures

- **Weatherization:**
  - Air sealing / duct sealing
  - Low flow shower heads
  - Faucet aerators
  - Pipe wrap

- **Energy-efficient lighting:**
  - Dwelling unit
  - Common area
  - Exterior

- **Add-on Measures:**
  - Insulation
  - Windows
  - High efficiency heating equipment
  - Domestic hot water heaters
  - High efficiency control strategies (e.g., ECM pumps, VFD)
  - Appliances

Custom measures are evaluated based on opportunities identified within the property.
Two Multifamily Paths

▪ New Construction
  – Ground up new construction
  – Redevelopment
  – Gut rehabs

▪ Renovation
  – Moderate rehab
  – Capital improvements
  – Targeted energy upgrades
New Construction Multifamily Incentive Process

1. Applicants HERS Rater submits proposal* to utility
2. Utility reviews proposal
3. Utility Letter of Participation issued
4. Project closes on funding and begins construction
5. Utility Letter of Agreement or RNC Application signed for incentive commitment
6. Project closes on funding and begins construction
7. HERS rater completes final testing and energy modeling
8. Incentive payments issued by Utility
9. Incentive payments issued by Utility

*Proposal includes:
1) REM/Rate or other modeling report detailing the As-Designed expected HERS Index
Renovation Multifamily Incentive Process

1. **Submit proposal** to utility
2. **Utility reviews proposal**
3. **Utility Letter of Participation Issued**
4. **Utility Letter of Agreement issued for incentive commitment**
5. **CHFA/DOH funding awarded**
6. **Inspection**
7. **Incentive payment issued by utility**

*Proposal includes:
1) Scope of work
2) Multifamily Initiative Application
3) Project Fill Out Form
To learn more about the Multifamily Initiative, please visit:

energizect.com/your-home/solutions-list/Multi-Family
Contact Information

UI / SCG / CNG:
John Ruckes
John.ruckes@uinet.com
(203) 499-3371

Eversource:
Multifamily Initiative Team
multifamily@eversource.com
877-WISE USE
Questions and Answers
SHAREPOINT
CHRISTOPHER POLEK, CHFA
**What is SharePoint?**

- It is used as a means to submit a Consolidated Application to CHFA and DOH

- SharePoint is a Microsoft based product that will create a website for each application submitted, and then allow direct download of information for the recipient
What does SharePoint offer?

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

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

*September 7, 2017*
**SharePoint – Task List**

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

September 7, 2017
2. Application Checklist

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

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

**Task List**

Consolidated Application and QAP Overview Session 9/7

+ new task or edit this list

<table>
<thead>
<tr>
<th>Title</th>
<th>Due Date</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensure that you meet the technological prerequisites (Section 1. above)</td>
<td>...</td>
<td></td>
</tr>
<tr>
<td>Consolidated Application and QAP Overview Session</td>
<td>... September 7</td>
<td></td>
</tr>
<tr>
<td>(Optional) Set up Pre-Application Meeting with CHFA and DOH (if needed)</td>
<td>...</td>
<td></td>
</tr>
<tr>
<td>Share this site with your Development Team</td>
<td>...</td>
<td></td>
</tr>
<tr>
<td>Upload all appropriate documents/exhibits as noted in the Consolidated Application Workbook</td>
<td>...</td>
<td></td>
</tr>
<tr>
<td>Complete the Consolidated Application Workbook (see below)</td>
<td>... November 1</td>
<td></td>
</tr>
<tr>
<td>Ready for Review (Check when ready to submit application)</td>
<td>... November 1</td>
<td></td>
</tr>
</tbody>
</table>
**Consolidated Application Workbook**

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

September 7, 2017
3. Consolidated Application Workbook

The Microsoft Excel Consolidated Application Workbook is listed below. Click the workbook to open it in Excel or press the appropriate buttons on the Exhibit Checklist form. Be sure to click the "Core Items" button first, then automatically upload your latest changes here. (For help on how to complete this workbook, click here.)

ConApp Workbook

New  Upload  Sync  Share  More

Name

Consolidated Application Workbook 2017.2  August 16  Christopher Polek  1.0

Drag files here to upload
File Uploads

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

September 7, 2017
File Uploads

Upload exhibits to this application by dragging files onto the upload area, below or by clicking the "Upload" link. Organize files as needed.

<table>
<thead>
<tr>
<th>Folders</th>
<th>All Documents</th>
<th>Flat</th>
<th>Find a file</th>
</tr>
</thead>
<tbody>
<tr>
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<td>SECTION II - REGULATORY COMPLIANCE</td>
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<td>JI</td>
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<tr>
<td>SECTION III - DEVELOPMENT TEAM</td>
<td>...</td>
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<td>JI</td>
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<tr>
<td>SECTION IV - DEVELOPMENT</td>
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<td>JI</td>
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<tr>
<td>SECTION V - RENTAL DEVELOPMENTS (NA for Homeownership Projects)</td>
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<td>SECTION VI - FINANCING</td>
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<td>SECTION VII - HOMEOWNERSHIP DEVELOPMENTS (NA for Rental Properties)</td>
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<td>SECTION VIII - DOH FEDERAL PROGRAMS</td>
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<td>SECTION IX - AFFIRMATIVE ACTION FAIR HOUSING &amp; EQUAL OPPORTUNITY</td>
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<td>JI</td>
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<tr>
<td>SECTION X - CERTIFICATIONS (Signed documents should be included in Tab B)</td>
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<tr>
<td>SECTION XI - OTHER</td>
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<td>SECTION XII - HTCC APPLICATION EXHIBITS</td>
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<td>JI</td>
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<td>SECTION XIII - POINTS CALCULATION WORKSHEETS</td>
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<td>SECTION XIV - POINTS DOCUMENTATION</td>
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<td>JI</td>
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<tr>
<td>SECTION XV - MISCELLANEOUS EXHIBITS</td>
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<tr>
<td>SECTION XX - CLARIFICATIONS</td>
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September 7, 2017
Sharing the Site

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

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

2. Application Checklist

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

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**Reference Library**

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

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

- Large Excel workbook designed to be used for numerous funding rounds
- Includes templates for required forms, and instructions
- Shows Threshold Requirements for each type of application (Exhibit Checklist)
- Has links throughout for ease of navigation and reference
- Includes buttons on the Exhibit Checklist to show only necessary items based on the funding round
Using The Consolidated Application

- Start on the Exhibit Checklist, by clicking the “Core Items” button, then clicking the appropriate funding round buttons
- This will hide any items not needed for that specific round
- If a mistake is made, or additional exhibits are needed, click “Show All”
  - Information will not be lost, just hidden until “Show All” button is selected
- Fill out blank fields, checkboxes, drop downs on the Application worksheet
Using the Consolidated Application cont’d

<table>
<thead>
<tr>
<th>Exhibit Number</th>
<th>CHFA/DOH Use only</th>
<th>CHFA Funding</th>
<th>LITC</th>
<th>HTCC</th>
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<td>Cover Sheet (Form Provided)</td>
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SECTION I. APPLICANT and CO-SPONSOR

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SECTION II. REGULATORY COMPLIANCE

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Consolidated Application cont’d

Drop Downs

Data Tables

Checkboxes
Using The Consolidated Application

• Complete other required worksheets to be included with submission

• Print and sign any applicable signature documents.
  – Scan and upload signature documents with application submission via SharePoint

• If something needs to be modified, a request to unlock specific sections can be made, but must include an explanation.
Changes made to Consolidated Application

- 1.2 – Added “co-sponsor” definition to application tab
- 3.1 - Added Consultant Capacity info
  - added language asking for any dev. Team members current projects as well as completed
- 4.1.d - Added DDA link
- 4.6.b - added “Required Construction Completion
- 4.8.a - Added “8th – 30th floors” to unit distribution on application worksheet
- 4.8.b - Added language to application worksheet
- 4.8.e - Added changes to form
- 4.9.a - Added language to excluded from HTCC Pre-Dev applications
- 6.3 - Dev Budget – added “Cost of Bond Issuance”
- 13.1 - updates to Points Calc. Sheet
  - Updated LIHTC Points sheet to include DDA with QCT
- 13.2 - Update to HTCC Points related information

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## Contact Information

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chris Polek</td>
<td><a href="mailto:christopher.polek@chfa.org">christopher.polek@chfa.org</a></td>
<td>Consolidated Application and SharePoint process</td>
</tr>
<tr>
<td>Debbie Alter</td>
<td><a href="mailto:deborah.alter@chfa.org">deborah.alter@chfa.org</a></td>
<td>LIHTC Program and Financing</td>
</tr>
<tr>
<td>Maj Kabir</td>
<td><a href="mailto:maj.kabir@chfa.org">maj.kabir@chfa.org</a></td>
<td>LIHTC Program and Financing</td>
</tr>
<tr>
<td>Terry Nash</td>
<td><a href="mailto:terry.nash@chfa.org">terry.nash@chfa.org</a></td>
<td>QAP, Procedures and Guidelines, Supportive Housing</td>
</tr>
<tr>
<td>Jennifer Landau</td>
<td><a href="mailto:jennifer.landau@chfa.org">jennifer.landau@chfa.org</a></td>
<td>Technical Services Requirements</td>
</tr>
<tr>
<td>Chuck Emerson</td>
<td><a href="mailto:charles.emerson@chfa.org">charles.emerson@chfa.org</a></td>
<td>Sustainable Design / Passive House</td>
</tr>
<tr>
<td>Jon Cabral</td>
<td><a href="mailto:jonathan.cabral@chfa.org">jonathan.cabral@chfa.org</a></td>
<td>Opportunity Characteristics</td>
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<tr>
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<td></td>
<td></td>
</tr>
<tr>
<td>Nick Lundgren</td>
<td><a href="mailto:nick.lundgren@ct.gov">nick.lundgren@ct.gov</a></td>
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</tbody>
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