

**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

September 7, 2017



# 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

Priority	Points
Rental Affordability	33 points
Financial Efficiency & Sustainability	26 points
Municipal Commitment & Impact	18 points
Opportunity Characteristics	14 points
Qualifications & Experience	11 points
SSHP Developments – Additional Points	2 points
Total	104 points



# 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

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



# 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



# 2017 Round - Passive House Submission Recommendations

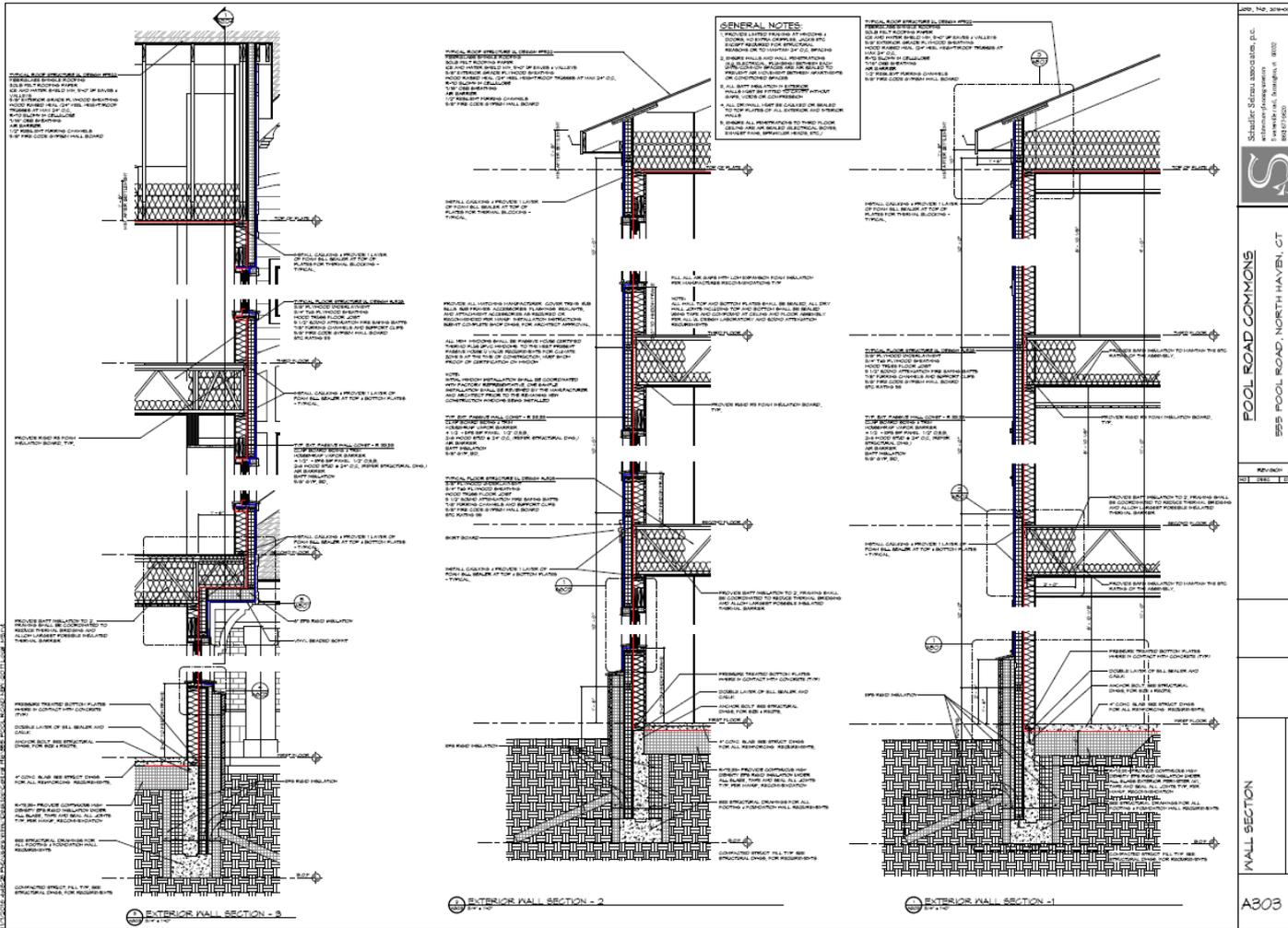


- Provide color-printed plan and wall section details, with continuous red-lined air barriers and blue-lined water barriers
- Provide color-printed isotherm and infrared plan and wall section details at key intersections of slabs, walls and roofs and façade projections

September 7, 2017

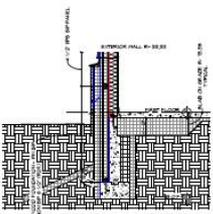
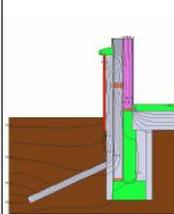
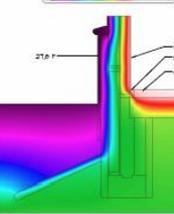
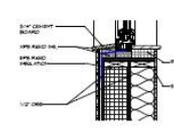
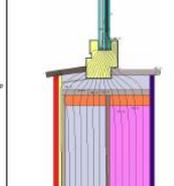
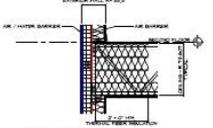
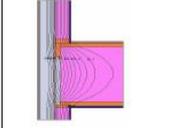
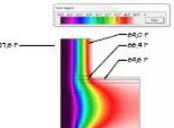
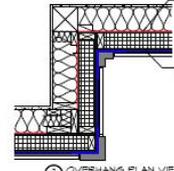
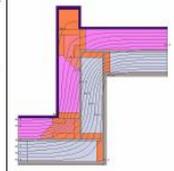
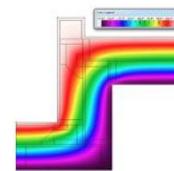
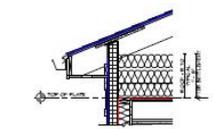
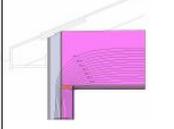
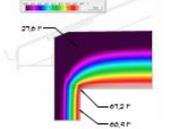
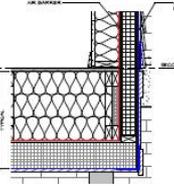
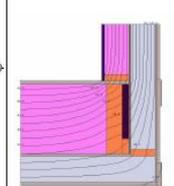
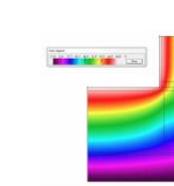
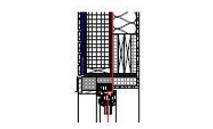
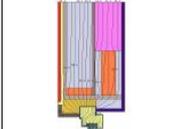
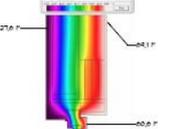
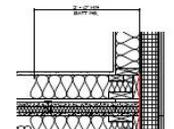
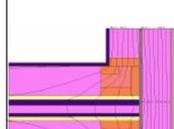
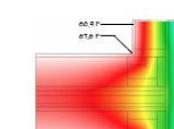


# Red-lined/Blue-lined Wall Section Details



September 7, 2017

# Red-lined, Blue-lined a& Isotherm/Infrared Plan/Wall Section Details

DETAIL	ISOTHERM	INFRARED	DETAIL	ISOTHERM	INFRARED
 <p><b>FOUNDATION DETAIL</b> 1/2" = 1'-0"</p>			 <p><b>WINDOW SILL DETAIL</b> 1/2" = 1'-0"</p>		
 <p><b>FLOOR DETAIL</b> 1/2" = 1'-0"</p>			 <p><b>OVERHANG PLAN VIEW</b> 1/2" = 1'-0"</p>		
 <p><b>ROOF DETAIL</b> 1/2" = 1'-0"</p>			 <p><b>OVERHANG DETAIL</b> 1/2" = 1'-0"</p>		
 <p><b>WINDOW HEAD DETAIL</b> 1/2" = 1'-0"</p>			 <p><b>STAIR EXTERIOR WALL</b> 1/2" = 1'-0"</p>		

APP. No. 2016-001  
 Schaefer Strouss Associates, P.C.  
 250 Main Street, Suite 200  
 Westport, Connecticut 06890  
 203.271.9200  
 www.schaefers.com  
  
**POOL ROAD COMMONS**  
 955 POOL ROAD, NORTH HAVEN, CT  
 REVISED  
 11/1/2016  
**PLUS PRE CERTIFICATION DOCUMENTS**  
 11/1/2016  
 11/1/2016  
**A004**



# 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



# 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





# TECHNICAL SERVICES GUIDANCE

## JENNIFER LANDAU, CHFA



## 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%



## 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 LUNDGREN



# 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



# 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

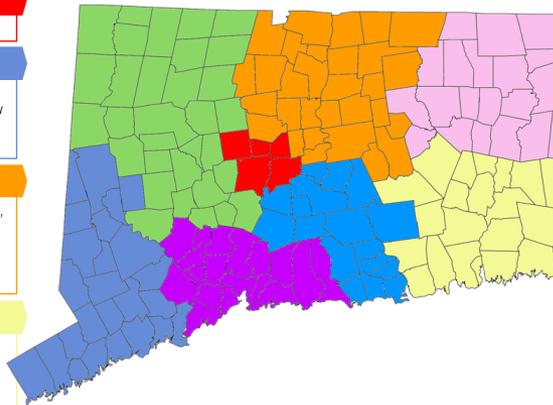
Bethel, Bridgeport, Bridgewater, Brookfield, Cos Cob, Danbury, Darien, Easton, Fairfield, Greenwich, Monroe, New Canaan, New Fairfield, New Milford, Newtown, Norwalk, Redding, Ridgefield, Roxbury, Sherman, Stamford, Stratford, Trumbull, Weston, Westport, Wilton

### Greater Hartford CAN

Andover, Avon, Bloomfield, Bolton, Canton, East Granby, East Hartford, East Windsor, Ellington, Enfield, Farmington, Glastonbury, Granby, Hartford, Hebron, Manchester, Marlborough, Newington, Rockville, Rocky Hill, Simsbury, Somers, South Windsor, Stafford, Suffield, Tolland, Vernon, West Hartford, Wethersfield, Windsor, Windsor Locks

### Southeast CAN

Bozrah, Colchester, East Lyme, Franklin, Griswold, Groton, Lebanon, Ledyard, Lisbon, Lyme, Montville, 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, Middlefield, Middletown, Old Saybrook, Portland, Wallingford, Westbrook

### Northeast CAN

Ashford, Brooklyn, Canterbury, Chaplin, Columbia, Coventry, Danielson, Eastford, Hampton, Killingly, Mansfield, Plainfield, Pomfret, Putnam, Scotland, Sterling, Thompson, Union, Willimantic, Willington, Windham, Woodstock

### Waterbury/Litchfield County CAN

Barkhamsted, Bethlehem, Burlington, Canaan, Cheshire, Colebrook, Cornwall, Goshen, Hartland, Harwinton, Kent, Litchfield, Middlebury, Morris, Naugatuck, New Hartford, Norfolk, North Canaan, Plymouth, Prospect, Salisbury, Sharon, Southbury, Thomaston, Torrington, Warren, Washington, Waterbury, Watertown, Winchester, Winsted, Wolcott, Woodbury

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

For data inquiries about any CAN, contact  
**Beau Anderson MPA**  
[beau.anderson@ct.gov](mailto:beau.anderson@ct.gov) (860) 416-0552

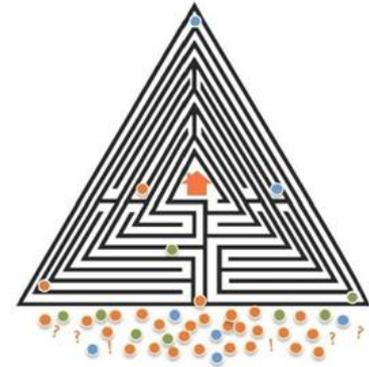
For questions about these CANs, contact  
**Leigh Shields-Church LCSW**  
[leigh.shields-church@ct.gov](mailto:leigh.shields-church@ct.gov) (860) 371-9579

# Filling Homeless Special Population Units

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

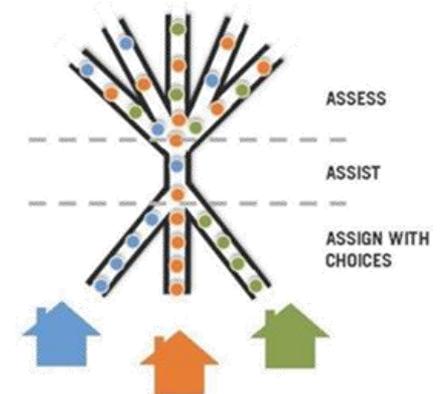
## Process Before Coordinated Access Networks

- 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



**JULIE CARMELICH**  
**DEPARTMENT OF ECONOMIC &  
COMMUNITY DEVELOPMENT**



Department of Economic and  
Community Development

State Historic Preservation Office



- 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](mailto:julie.carmelich@ct.gov)

Phone: 860.256.2762

Address: 1 Constitution Plaza, 2<sup>nd</sup> Floor  
Hartford, CT 06103

**Starting September 18**

Phone: 860.500.2362

Address: 450 Columbus Boulevard, South Tower  
Hartford, CT 06103





Empowering you to make  
smart energy choices

# Utility Incentives for Multifamily Energy Improvement and New Construction Projects

# Energize Connecticut

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- 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

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- **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

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- 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

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- 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

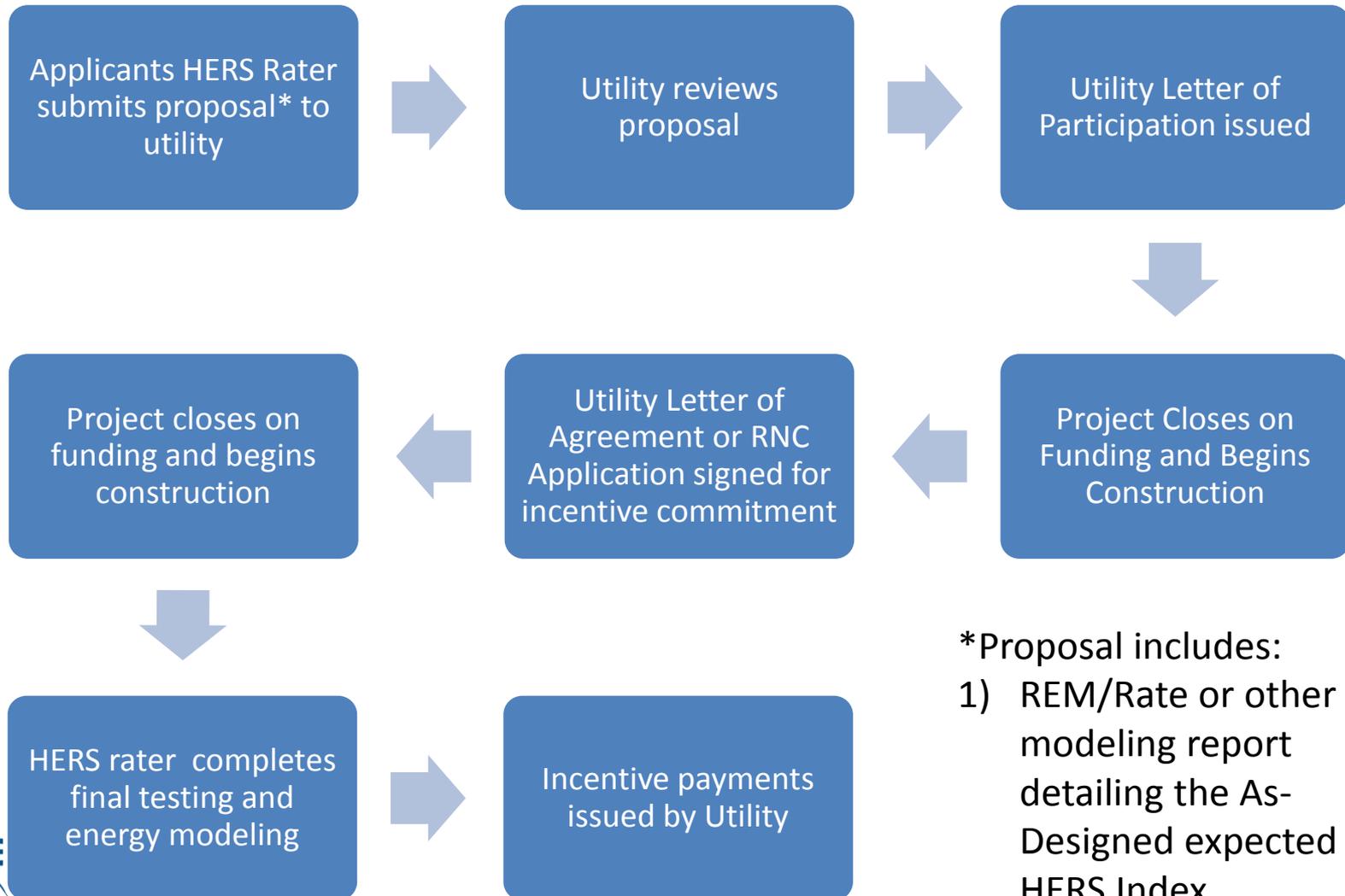
Custom measures are evaluated based on opportunities identified within the property.

# Two Multifamily Paths

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- New Construction
  - Ground up new construction
  - Redevelopment
  - Gut rehabs
  
- Renovation
  - Moderate rehab
  - Capital improvements
  - Targeted energy upgrades

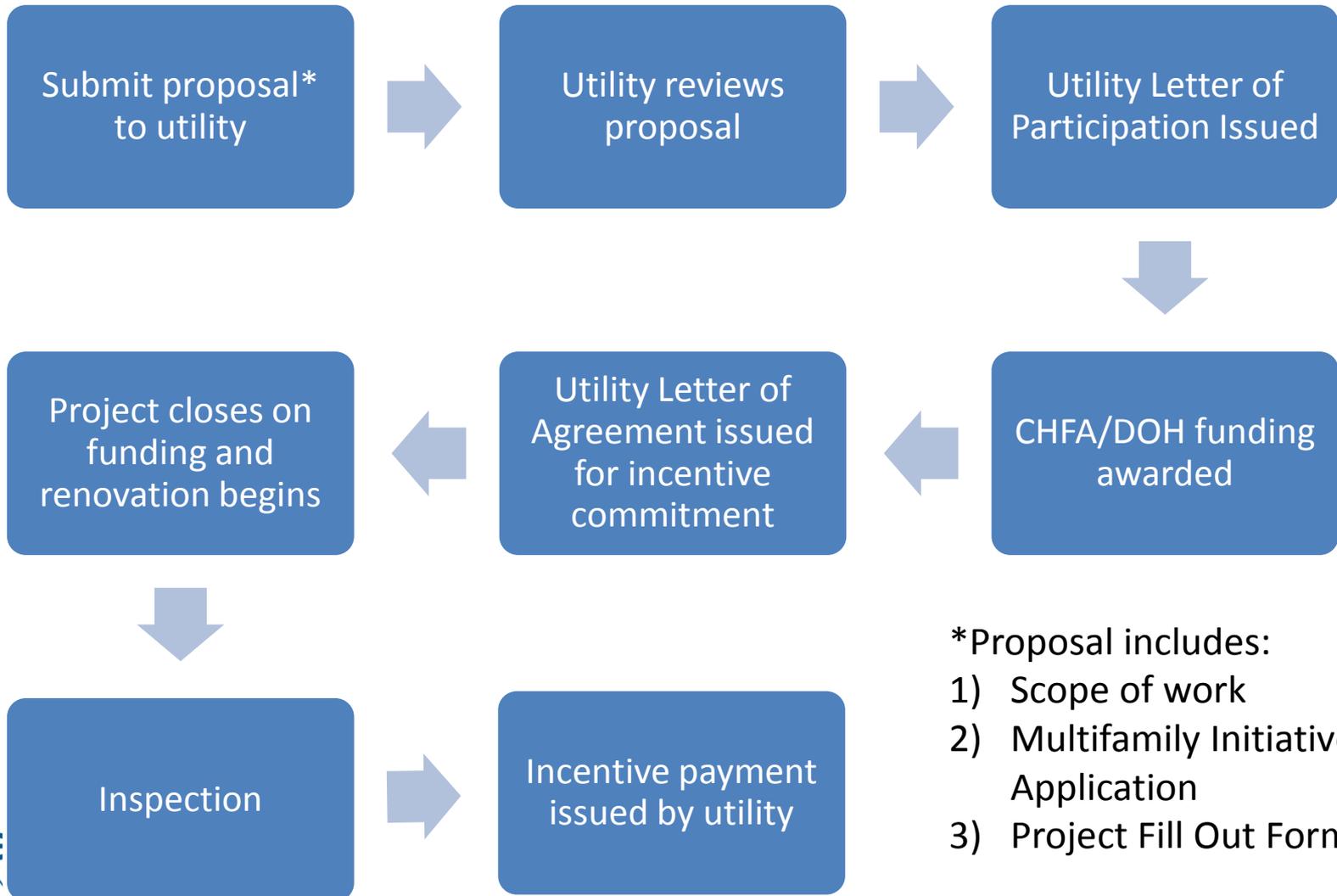
# New Construction Multifamily Incentive Process



\*Proposal includes:

- 1) REM/Rate or other modeling report detailing the As-Designed expected HERS Index

# Renovation Multifamily Incentive Process



\*Proposal includes:

- 1) Scope of work
- 2) Multifamily Initiative Application
- 3) Project Fill Out Form

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To learn more about the Multifamily Initiative,  
please visit:

[energizect.com/your-home/solutions-  
list/Multi-Family](https://energizect.com/your-home/solutions-list/Multi-Family)

# Contact Information

---

UI / SCG / CNG:

John Ruckes

[John.ruckes@uinet.com](mailto:John.ruckes@uinet.com)

(203) 499-3371

Eversource:

Multifamily Initiative Team

[multifamily@eversource.com](mailto:multifamily@eversource.com)

877-WISE USE

# *Questions and Answers*

September 7, 2017



# 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

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## *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.**



# SharePoint – Task List

## 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



+ new task or edit this list

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

# ***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)**

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# Consolidated Application Workbook

## 3. Consolidated Application Workbook

The Microsoft Excel Consolidated Application Workbook is listed below. Click the workbook to open it in Excel c pressing 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	Modified	Modified By	Version
		Consolidated Application Workbook 2017.2	... August 16	<input type="checkbox"/> 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



# File Uploads

## File Uploads ⓘ

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

New Upload Sync Share More ▾

Folders All Documents Flat ...

✓	Name	Item	Child	Count	M
	SECTION I - APPLICANT & CO-SPONSOR	...	0		Jt
	SECTION II - REGULATORY COMPLIANCE	...	0		Jt
	SECTION III - DEVELOPMENT TEAM	...	0		Jt
	SECTION IV - DEVELOPMENT	...	0		Jt
	SECTION V - RENTAL DEVELOPMENTS (NA for Homeownership Projects)	...	0		Jt
	SECTION VI - FINANCING	...	0		Jt
	SECTION VII - HOMEOWNERSHIP DEVELOPMENTS (NA for Rental Properties)	...	0		Jt
	SECTION VIII - DOH FEDERAL PROGRAMS	...	0		Jt
	SECTION IX - AFFIRMATIVE ACTION FAIR HOUSING & EQUAL OPPORTUNITY	...	0		Jt
	SECTION X - CERTIFICATIONS (Signed documents should be included in Tab B)	...	0		Jt
	SECTION XI - OTHER	...	0		Jt
	SECTION XII - HTCC APPLICATION EXHIBITS	...	0		Jt
	SECTION XIII - POINTS CALCULATION WORKSHEETS	...	0		S
	SECTION XIV - POINTS DOCUMENTATION	...	0		Jt
	SECTION XV - MISCELLANEOUS EXHIBITS	...	0		Jt
	SECTION XX - CLARIFICATIONS	...	0		Jt

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## *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



Home  
Task List  
ConApp Workbook  
File Uploads  
Reference Library  
Help  
Recent  
Recycle Bin

## 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.)



# 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)



- Home
- Task List
- ConApp Workbook
- File Uploads
- Reference Library
- Help
- Recent
- Recycle Bin



## Reference Library

### Overview

Completing this application may require input from various reference materials located on the CHFA and DOH websites.

### CHFA Reference Materials:

Consolidated Application Workbook 2016.3.xlsx

- 4.3.a - Project Narrative.pdf
- 4.3.b - Homeownership Development Projects Narrative.pdf
- 4.3.c - Market Assessment.pdf
- 4.3.d - Program Narrative.pdf
- 4.11 - Program Guideform - Relocation Assistance Plan.pdf
- 8.1.a - NEPA Statutory Checklist.pdf
- 8.1.b - NEPA Environmental Assessment Checklist.pdf
- 9.1.a - Fair Housing Impacts.pdf
- 10.1 - Certifications.pdf
- 10.3 - Affirmative Action Policy Statement.pdf
- 10.4 - Fair Housing Policy Statement.pdf
- 10.5 - Certification to Affirmatively Further Fair Housing.pdf
- 10.6 - HTCC Certification.pdf
- 12.6 - Building Schedule.pdf

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# *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.**

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# 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

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## *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



██████████ = Not applicable

N = Non-Threshold Item - if applicable, required prior to approval. If available, include with application.

T = Threshold Item - if applicable, required at application submission

Protect All (CHFA/DOH USE ONLY)

THIS FORM MUST BE SUBMITTED WITH INITIAL APPLICATION & ALL RESUBMISSIONS		CHFA Funding							Show All
Exhibit Number	Core Items	CHFA/DOH Use only	Financing	Supportive Housing	LIHTC	HTCC			Sp Prog
						Housing	Loan Fund	Development	
A	Completed Exhibit Checklist (Form Provided)		T	T	T	T	T	T	T
B	<a href="#">Cover Sheet (Form Provided)</a>		T	T	T	T	T	T	T
C	<a href="#">Summary Sheet (Form Provided)</a>								(Self-Generating)
D	<a href="#">Application (Form Provided)</a>		T	T	T	T	T	T	T
<b>SECTION I. APPLICANT and CO-SPONSOR</b>									
<a href="#">1.1</a>	Applicant Info		T	T	T	T	T	T	T
<a href="#">1.2</a>	Applicant Type		T	T	T	T	T	T	T
<a href="#">1.3</a>	Co-Sponsor Info		T	T	T	T	T	T	
<a href="#">1.4</a>	Co-Sponsor Type		T	T	T	T	T	T	
<a href="#">1.5</a>	Organizational Documents		T	T	T	T	T	T	
<a href="#">1.6</a>	Financial Statements		N	N					
<b>SECTION II. REGULATORY COMPLIANCE</b>									
<a href="#">2.1</a>	Previous Financial Involvement		T	T	T				
<a href="#">2.2</a>	Organizational History and Experience								

# Consolidated Application cont'd

**4.1 Development Information**

Development Name \_\_\_\_\_

Development Type Family  
Elderly  
Supportive Housing

Development Address \_\_\_\_\_

City \_\_\_\_\_

Metropolitan Area \_\_\_\_\_

Drop Downs

Data Tables

DEVELOPMENT NAME	0		
	Construction Sources	Permanent Sources	Grant [Y] or [N]
<b>PITAL, GRANTS, Etc.</b>			
DOH / HUD HOME Funds			
DOH Affordable Housing Program - FLEX			
DOH Housing Trust Fund			
DOH / HUD CDBG Small Cities Funds			
DOH Other [ Specify ]			
Other Public Funds [ Specify ]			
Federal LIHTC Net Proceeds		0	N/A
Federal Historic Tax Credit Net Proceeds			N/A
State Historic Tax Credit Net Proceeds			N/A
CT HTCC Tax Credit Proceeds			N/A
Developer / Investor Cash Equity			N/A
Homeownership Sales Proceeds			
Energy Rebates			
Existing Property Reserves			
Other [ Specify ]			
Other [ Specify ]			
<b>Sub-Total</b>	<b>\$0</b>	<b>\$0</b>	

**1.1 Applicant (Owner/Mortgagor)**

Applicant Name \_\_\_\_\_

Applicant Address \_\_\_\_\_

City \_\_\_\_\_

Contact Name \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Website \_\_\_\_\_

If awarded funds pursuant to this application, will the applicant or co-sponsor be-formed and anticipated name and date formed.

Please check appropriate Applicant type:

Housing Authority  For-Profit Entity

Partnership\*  Limited Liability Company

Other

If "Other" \_\_\_\_\_

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 “8<sup>th</sup> – 30<sup>th</sup> 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



# Contact Information



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

