Addendum I

Exhibit Checklist & Applicant Certifications
2015-2016

For Use With:

- The Low Income Housing Tax Credit Program
- The MSHDA Pass-Through Bond Financing Program

Updated: February 2015

www.michigan.gov/mshda
LOW INCOME HOUSING TAX CREDIT PROGRAM EXHIBIT CHECKLIST

(TO ALSO BE USED WITH MSHDA PASS-THROUGH BOND FINANCING WHEN APPLICABLE)

If applicable to the project and/or for points to be given to the project, the following items must be submitted along with the LIHTC Program Application. To indicate each exhibit submitted, place a check mark in the box provided and return a copy of this checklist with your application. Each submitted exhibit must be tabbed with the appropriate corresponding number from the checklist. If applying for Pass-Through Bond financing and 4% Low Income Housing Tax Credit (LIHTC) from MSHDA, the applicable items in Exhibit 31 of the checklist below must be submitted in addition to any other required exhibits in this checklist. Applicants are encouraged to provide a narrative description preceding each exhibit explaining how the submitted document satisfies the requirements, particularly for those exhibits that involve unusual or complex elements.

☐ EXHIBIT 1 – PROJECT NARRATIVE

A detailed and complete description of the project which includes the type of project; location; prior LIHTC status, if any; type of financing; tenants served; bedroom mix; local, federal or state subsidies, if any; map of the project site and surrounding area; and other relevant information. Additionally, the number of jobs created, including an explanation/analysis for how this number was determined.

See Threshold Requirement II in QAP Exhibit I

☐ EXHIBIT 2 – SITE CONTROL

Documentation, signed by all applicable parties, in the form of a warranty deed, exclusive option to purchase, land contract, etc., which evidences ability to maintain site control for 120 days from the application due date, with extensions available. Submitted documentation should contain a full legal description and clearly identify the purchase price of each parcel to be used in the development.

See Threshold Requirement III in QAP Exhibit I

☐ EXHIBIT 3 – ZONING

Original documentation, dated within one year of the application due date, from the appropriate local official on official letterhead, identifying the address of the project, the property's current zoning designation and an explanation of whether or not the project is permitted under the zoning ordinance. For rehabilitation projects, a letter from the municipality stating that the zoning is compatible with the proposed use of the buildings is required. If the project is not currently properly zoned, what, if any, steps are in process to obtain proper zoning for the proposed development. The documentation must include a timetable for re-zoning.

See Threshold Requirement IV in QAP Exhibit I
EXHIBIT 4 – UTILITIES

EXHIBIT 4A – SITE UTILITY AVAILABILITY

Original documentation, dated within one year of the application due date, from the municipality and/or local utility companies on their letterhead regarding utility availability and adequacy to serve the site, including whether such is currently available or will be available.

See Threshold Requirement V in QAP Exhibit I

EXHIBIT 4B – UTILITY ALLOWANCE DOCUMENTATION

To demonstrate the accuracy of the utility allowance figures shown in the application, the following information must be submitted for all projects:

- A definitive statement indicating the method that is being used for calculating the utility allowances shown in the application based on the specific project type being proposed.

- Documentation (RHS/HUD Utility Chart, PHA Rate Sheet, Utility Company Estimate, HUD Utility Model Calculation, or the agency approved Utility Allowances through the Actual Consumption Method for existing LIHTC properties already using this method) showing how the specific utility allowances for the units are being calculated. All rate sheets, charts, or models should be accompanied by an explanation and/or a separate calculation showing how the utility allowances in the application were derived based on the documentation that is submitted.

See LIHTC Allocation Policy #13 in Tab W

EXHIBIT 5 – MARKET DATA

A copy of the completed market study along with the approval memo from MSHDA’s Chief Market Analyst.

See Threshold Requirement VI in QAP Exhibit I & Tab C of MSHDA’s Combined Application

EXHIBIT 6 – ENVIRONMENTAL ASSESSMENT

Level 1 Environmental Assessment or, if necessary, a Level II with a remediation plan, dated within six months of application due date. See Tab D for specific requirements. If project requires a NEPA review because it will use MSHDA HOME Funds, MSHDA Project-Based Vouchers, etc., Applicants must also submit the documentation included in the NEPA Review Checklist. Specific environmental requirements as well as a copy of the NEPA Review Checklist can be found in Tab D.

See Threshold Requirement VII in QAP Exhibit I & Tab D of MSHDA’s Combined Application

EXHIBIT 7 – TITLE INSURANCE COMMITMENT

All projects are required, at the time of application, to submit a title insurance commitment dated within six months of the application due date, which sets forth all encumbrances on the property, together with copies of such encumbrances. Additionally, projects must also submit the Property Identification form found within the LIHTC Program Application to accompany the title insurance documentation.

For projects located on federally recognized American Indian Reservation, an attorney’s opinion letter
regarding the chain of title and land control may be accepted in lieu of the title insurance commitment.

Applicants must assure that the owner of record and the party to be insured along with the legal description(s) of the property identified in the commitment properly match up with the site control documents submitted in Exhibit 2 and that the title insurance agent signs the commitment.

See Threshold Requirement VIII in QAP Exhibit I

EXHIBIT 8 – FINANCING

For Exhibits 8A through 8E, duplication of information is not necessary. All sources of funding that will be used in the project must be included in the LIHTC Program Application. All sources of financing demonstrated in exhibits 8A through 8E must be in the form of a firm commitment dated within 30 days of the application due date.

NOTE: For LIHTC applications that are proposing to apply for other funding sources that are only available as part of a funding round held by another entity, Applicants should refer to Section IX in QAP Exhibit I for submission requirements both at the time of application and prior to receipt of an award of LIHTC.

See Threshold Requirement IX in QAP Exhibit I

EXHIBIT 8A – CONSTRUCTION FINANCING

Letter from the construction lender on letterhead evidencing that an application for financing has been submitted and showing that the application is under serious consideration.

All documentation must include mortgage amount, interest rate, term of loan, and the terms of any loan guarantee (if applicable).

EXHIBIT 8B – PERMANENT FINANCING

Evidence of submission of application to mortgage lender:

- RHS project - An original letter signed by an official of RHS confirming that the financing application has been submitted.
- Conventional financing - documentation from the lender(s) stating that a formal application for permanent financing has been submitted and is under serious consideration.
- MSHDA financed project - evidence that the project has passed initial determination.

All documentation must include mortgage amount, interest rate, term of loan, and the terms of any loan guarantee (if applicable).

EXHIBIT 8C – CONFIRMATION OF SECONDARY FINANCING - IF APPLICABLE

Proposals which rely on some form of secondary financing to achieve feasibility must be accompanied by a detailed explanation and a confirmation from the source of that secondary financing that the additional funds have been applied for and are (or are expected to be) available.

EXHIBIT 8D – FEDERAL, STATE OR LOCAL GOVERNMENT FINANCING

Original letter from local municipality stating that application has been submitted and amount of request, terms and interest rate.
If the proposed project is going to use Federal Historic Credit or MEDC Community Revitalization Program funding, documentation indicating that the appropriate entity (either SHPO or MEDC) has received either Part I of the required application for the proposed project (for Historic Credit) or that it has received a pre-application (for MEDC CRP funds) must be submitted.

**EXHIBIT 8E – GRANTS/OTHER SUBSIDIES**

Original letter from proposed grantor stating that application has been submitted and amount of request.

**EXHIBIT 9 – EXISTING PROJECT FINANCING**

- Copy of existing mortgage(s), if assumption.

- For acquisition/rehabilitation projects of existing low income units financed by HUD, RHS, or MSHDA, a statement from the Applicant of the requirements for obtaining approval of the transfer of physical assets and how the Applicant intends to meet the requirements consistent with the LIHTC timetables must accompany the tax credit application.

*See Threshold Requirement X in QAP Exhibit I*

**EXHIBIT 10 – EQUITY INVESTOR LETTER**

At the time of application, all Applicants must submit an equity investor letter from the proposed syndicator or investor. The letter must include the following:

- The amount, price, and terms of the investment;

- The planned equity pay-in schedule;

- Investment underwriting and financial forecast pages compiled by investor (sources and uses of funds, development budget, draw schedules, rental income and operating expenses, cash flow analysis, lease-up schedule, tax credit analysis, capital account analysis, etc.);

- Certification that investor has conducted financial review of development team;

- Clear statement of any conditions for investment that need to be met;

- Approval of any underwriting assumptions that deviate from Tab O. of MSHDA’s Combined Application.

Projects that fail to include one or more of the above items may be determined ineligible for funding.

*See Threshold Requirement XI in QAP Exhibit I*

**EXHIBIT 11 – GREEN POLICY**

Evidence of the incorporation into the project of one of the three green standards set forth in the Green Policy. Completion of the certification is required to meet both the threshold requirement and to obtain
points.

See Tab M, Threshold Requirement XII in QAP Exhibit I, and Scoring Criteria – Section A, #7.

EXHIBIT 12 – DEVELOPMENT TEAM CAPACITY

EXHIBIT 12A – OWNER EXPERIENCE

MUST COMPLETE OWNER/GENERAL PARTNER EXPERIENCE FORM PROVIDED IN ADDENDUM I AND CERTIFY (USING THE ACCOMPANYING CERTIFICATION FOUND IN ADDENDUM I) that the projects for which it is requesting points have maintained a positive operating cash flow from typical residential income alone and have funded reserves in accordance with the partnership or operating agreement and any applicable loan documents for the year in which each development’s last financial statement has been prepared. NOTE: The number of successful properties must be identified on the General Partner/Member Experience Certification to receive points.

See Threshold Requirement XIII in QAP Exhibit I & Scoring Criteria- Section D, #1

EXHIBIT 12B – MANAGEMENT ENTITY EXPERIENCE

MUST COMPLETE MANAGEMENT EXPERIENCE FORM PROVIDED IN ADDENDUM I.

See Threshold Requirement XIII in QAP Exhibit I & Scoring Criteria- Section D, #2

EXHIBIT 12C – FINANCIAL CAPACITY AND CREDITWORTHINESS

Financial Statements of contractors and all members of an ownership entity providing guarantees to the project must be submitted for all projects. If an applicant is unable to satisfy the financial requirements outlined in Policy #7, a letter from the LIHTC equity provider confirming its acceptance of the applicant’s financial capacity may be submitted along with the submission of the required financial statements.

See LIHTC Allocation Policy #7 in Tab W & Threshold Requirement XIII in QAP Exhibit I

EXHIBIT 13 – AFFIRMATIVE FAIR HOUSING MARKETING PLAN

Submission of an Affirmative Fair Housing Marketing Plan consistent with MSHDA requirements

See Tab P for AFHMP guidelines & Threshold Requirement XIV in QAP Exhibit I

EXHIBIT 14 – NONPROFIT DOCUMENTATION

Exhibits 14A through 14J are ALL required if applying under the tax-credit nonprofit set-aside and/or for nonprofit points.

a) Documentation of Federal 501(c)(3) or (4) status from the IRS

b) A certified copy of the Articles of Incorporation dated within 30 days of application due date

c) Copy of by-laws

d) List of the board of directors which includes the address and tenure of each board member

e) An executed agreement between the sponsor and the non-profit if the project is a joint venture

f) Description of the nonprofits previous experience in housing. Must complete Nonprofit Experience form provided in the LIHTC Program Application.

g) Current Certificate of Good Standing from LARA’s Bureau of Commercial Services dated within 30 days of application due date

h) Map clearly outlining service area of nonprofit. Map must clearly indicate the specific location(s) and name(s) of affiliated or proposed developments. If proposed development is located outside of the
nonprofit service area, a narrative must be provided clarifying how the nonprofit is able to provide services to the development.

i) Narrative describing the nonprofit’s significant involvement, in addition to the proposed project (e.g. housing and/or other activities), in the local community in which the proposed project will be located.

j) Proof of CHDO approval (if applicable)

**NOTE:** Must be more than 50% nonprofit, general partnership ownership (if applying for points)

*See Threshold Requirement XV in QAP Exhibit I & Scoring Criteria –Section D, #3*

EXHIBIT 15 – OWNERSHIP ENTITY FORMATION

Copy (dated within 30 days of application due date) of the certificate of limited partnership/articles of organization and any amendments on file with the LARA Bureau of Commercial Services. Out-of-state entities must submit a copy of an endorsed application for certificate of authority to transact business or conduct affairs in Michigan, along with the supporting documentation submitted with the application. The ownership entity must be formed prior to issuance of a tax credit reservation.

*See Threshold Requirement XVI in QAP Exhibit I*

EXHIBIT 16 – PROXIMITY TO TRANSPORTATION

If applying for points in Section A, #1 of the Scoring Criteria, applicants must **demonstrate** the project is located within 1/10 of a mile from a public transportation stop (i.e. bus stop), or are creating a public transportation stop within 1/10 of a mile. Alternatively, a project could **demonstrate** that it will provide a form of transportation to the project that is comparable to or exceeding the service levels and scope of a typical fixed route public transportation system.

Applicants may also **demonstrate** another form of transportation, which is not comparable to the service levels and scope of a typical fixed route public transportation system as noted above, for lesser points.

*See Scoring Criteria- Section A, #1*

EXHIBIT 17 – SITE AMENITIES/CENTRAL CITIES

a. Print and include the project’s classic Walk Score (i.e. not the Street Smart Walk Score), which can be determined by going to [www.walkscore.com](http://www.walkscore.com) (if applicable for points).

b. A written description by the Applicant indicating how the project qualifies as being located in a traditional downtown or commercial center, if applying for Central Cities Developments points as shown in Section A, #3 of the Scoring Criteria.

*See Scoring Criteria- Sections A, #2 and #3*

EXHIBIT 18 – TAX ABATEMENT

Certified copy of project-specific tax abatement ordinance or an area-wide tax abatement ordinance with a qualifying resolution. All ordinances and/or qualifying resolutions must substantially follow the form of MSHDA’s model tax abatement ordinance templates found on [MSHDA’s website](http://www.mshda.org) to be considered valid and eligible for points.

**Proof of Local Taxation Rate (if no tax abatement)** - For acquisition/ rehabilitation, including Preservation, the yearly summer and winter tax bills will meet this requirement.

*See Tab A and Scoring Criteria - Section B, #1, for specific filing requirements.*
EXHIBIT 19 – NEIGHBORHOOD REVITALIZATION PLAN/INVESTMENT ACTIVITY AREA

If applying for points in Section A, #4 of the Scoring Criteria, the following must be submitted:

1. A signed letter or resolution from the local government, dated within one year of the LIHTC application deadline, that supports and outlines the significance of the proposed project and satisfies either (a) OR (b):
   (a) Identification of the neighborhood revitalization plan for the area.
      i. Includes a link to the plan if not included in the application.
      ii. Outlines the goals of the plan.
      iii. Defines specific boundaries of the targeted area.
      iv. Describes how the proposed project complements the plan goals.
      v. Describes the significant investment that is occurring or that is anticipated for the targeted area.
   (b) Description of recent significant investment in the area that has or is occurring proximate to the proposed project.

2. A detailed map outlining the target area (if applicable) which also identifies the proposed project and clearly indicates the investments (via a legend) that have recently occurred, are occurring, or are expected to occur in the area.

3. Documentation to evidence the major investment in the area of the project.

4. A narrative description that demonstrates how the project qualifies for neighborhood revitalization plan or investment activity area points.

See Scoring Criteria – Section A, #4 for specific requirements

EXHIBIT 20 – SITE PLAN APPROVAL

If applying for points in Section B, #3 of the Scoring Criteria, a letter signed by the appropriate official of the municipality on its letterhead, dated within one year of the application due date, which identifies the project’s name and address and states that final site plan approval has been granted; or, if site plan approval has been granted with contingencies, a statement in the letter indicating that the contingencies do not have to be approved by the municipal planning body, but may be approved at a staff level. (For rehabilitation projects, a letter from the municipality indicating that the relevant board or commission of the municipality has reviewed the proposal, including the level of rehabilitation work to be completed, the site, and that no further plan approvals are necessary.)

See Scoring Criteria – Section B, #3 for specific requirements

EXHIBIT 21 – COMMUNITY SPACE

If applying for points in Section C, #1 of the Scoring Criteria, submission of a drawing of the building(s) in which community space is located. To receive points, the following must be considered and identified:

- The total square footage of the community space must be clearly indicated in the drawing.
- The drawing must also clearly indicate the location and size of the community room.
- If combining the community space from several buildings in order to achieve required square footage, a drawing of each building must be provided.
- If the community space is provided in a separate building, it must be located within a reasonable proximity to the proposed project.
- If a community space being used by multiple phases of the same project is being used, it must meet the minimum square footage requirement for all of the units in all of the phases of the project that will use the community space.

See Scoring Criteria – Section C, #1
EXHIBIT 22 – TENANT OWNERSHIP

If applying for a point in Section C, #5 of the Scoring Criteria, submission of a detailed tenant ownership plan that describes the terms of the right of first refusal, the determination of the sales price for each unit, and any continuing use or deed restrictions that will be imposed on the units by the seller following any transfer.

See LIHTC Policy Bulletin in Tab W. See Scoring Criteria – Section C, #5

EXHIBIT 23 – HISTORIC REHABILITATION PROJECTS

If applying for points in Section A, #6 of the Scoring Criteria, Applicants must provide a confirmation letter from the State Historic Preservation Office (SHPO) that the project is listed on the National or State Historic Register, or that the SHPO expects the building to be listed on the National or State Historic Register and is in the process of listing the property.

See Scoring Criteria- Section A, #6

EXHIBIT 24 – ARCHITECT’S CERTIFICATIONS

EXHIBIT 24A – VERIFICATION OF USE OF MICHIGAN PRODUCTS

To demonstrate the use of products and goods that are manufactured by Michigan-based corporations and that are to be incorporated into the construction or rehabilitation of the proposed development, an Architects Certificate must be submitted. (See Tab HH for certification language requirements).

See Threshold Requirement XXI in QAP Exhibit I

EXHIBIT 24B – VISITABLE UNITS

A certification signed by the applicant and the project architect confirming that the project will incorporate all of the visitability design features shown in Section C, #6 of the Scoring Criteria (if applicable for points).

See Scoring Criteria- Section C, #6

EXHIBIT 24C – BARRIER FREE UNITS

A certification signed by the applicant and the project architect confirming the number of units in the project that will be designed according to barrier free standards or designed to be fully adaptable to barrier free standards.

See Scoring Criteria – Section C, #7

EXHIBIT 24D – TOTAL PROJECT SQUARE FOOTAGE

A certification signed by the applicant and project architect confirming the total amount of square footage in the project, excluding commercial space that is not a part of the housing project application being proposed. All applicants must submit this certification and all projects must be evaluated for Cost Containment points found in Section G, #1 of the Scoring Criteria.

See Scoring Criteria – Section G, #1
EXHIBIT 25 – REPLACEMENT/RE-DEVELOPMENT OF PUBLIC HOUSING

Letter from the applicable Public Housing Commission, which at a minimum includes the following: Indication that the Applicant has been designated as the developer for the project site, confirmation that the proposed project is the replacement or redevelopment of public housing units, the number of units that will be designated as public housing units, the amount and type of funds that will be made available for the redevelopment of the property, and what, if any, operating subsidy will be made available to the project, including the anticipated total dollar amount of the operating subsidy and/or the number of units expected to be covered by the operating subsidy.

See Scoring Criteria – Section E, #3

EXHIBIT 26 – PRESERVATION PROJECTS

See Preservation Category Threshold Requirements in QAP Exhibit II

EXHIBIT 26A – PROJECT AUDIT (REQUIRED)

A copy of the project’s latest financial audit.

EXHIBIT 26B – REHABILITATION OF 236 PROPERTY (IF APPLICABLE)

For projects involving the rehabilitation of an existing HUD 236 property:
- Documentation demonstrating that the property is a Section 236 property
- Documentation demonstrating that the property has received a commitment from a local PHA to commit Project-Based Vouchers to the project. At a minimum, this documentation should include the number of units that will receive the rental assistance and the length of time the rental assistance will be in place. (if applicable for points)

See Scoring Criteria – Section E, #1

EXHIBIT 27 - PROJECT-BASED TENANT SUBSIDIES

Documentation demonstrating the preservation of existing project-based subsidies or obtaining a new project-based tenant subsidy contract (other than MSHDA PBV). This documentation should include, at a minimum, the length of time that the subsidies will be in place for, the number of units receiving project-based tenant subsidies, and submission of the project subsidy contract that is currently in place or a firm commitment from the contract administrator.

See Scoring Criteria – Section E, #5

EXHIBIT 28 – PERMANENT SUPPORTIVE HOUSING

If applying under the Permanent Supportive Housing Category, submit the Addendum III application package and its required thresholds and any applicable items for points, in addition to all other required exhibits contained within this exhibit checklist that are needed to meet minimum threshold requirements, and complete Scoring Criteria – Section F.

See Addendum III & Scoring Criteria – Section F.

EXHIBIT 29 – TRADE PAYMENT BREAKDOWN

A trade payment breakdown signed by the owner and contractor must be submitted for all projects. Cost figures shown on the Trade Payment Breakdown should match figures submitted in the LIHTC Program.
If applying for consideration under the Strategic Investment Category, the following items must be submitted in addition to any other applicable required exhibits contained in this exhibit checklist:

- A written narrative detailing very specifically the reasons why the project should be considered as part of the Strategic Investment Category. At a minimum, the narrative must include a discussion on the level of community impact (including economic and social impact), unique financing opportunities, job growth, coordination with other site amenities, coordination with an overall community revitalization effort, and any other relevant information.

- Evidence of a Neighborhood Plan adopted by the municipality that delineates target properties (new construction, rehabilitation, demolition, for example) and that explains how housing related amenities such as transportation and community services are or will be incorporated.

- Evidence of significant municipal and/or state funding commitment(s) – not including housing tax credits – and any other unique sources of financing.

- Evidence of substantial outside private investment, within the past two years and/or planned and committed in the following two years - not including investment in housing tax credits.

- Demonstration of proximity to job growth/new sources of employment.

*See Requirements in QAP Exhibit III*

In addition to the above exhibits, the following exhibits 30A through 30G only need to be submitted if applying for Pass-Through Bond financing and 4% LIHTC from MSHDA:

- **EXHIBIT 31A – CREDIT ENHANCEMENT**
  A description of the proposed credit enhancement and a statement as to the amount of tax-exempt bonds (and taxable bonds, if appropriate) requested. The proposed credit enhancement may be in a form of an unconditional letter of credit, guaranty, bond or mortgage insurance, or other security as the Authority deems appropriate to assure the Authority that repayment of the bonds is reasonably secure.

- **EXHIBIT 31B – HUD Loan Commitment (if applicable)**
  Submission of the HUD loan commitment and documents submitted in conjunction with the applicant’s HUD loan approval.

- **EXHIBIT 31C – BOND COSTS AND PROFESSIONAL TEAM COSTS**
  An agreement to pay all costs of issuing the bonds and to compensate the professional team for the bond issue, including the underwriter, trustee, and bond counsel, at no cost to the Authority.

- **EXHIBIT 31D – FULL DEVELOPMENT TEAM IDENTIFICATION**
  Identification of the full development team, including the bond underwriter, bond trustee, bond counsel, equity partner and rating agency.

- **EXHIBIT 31E – PRELIMINARY EQUAL EMPLOYMENT OPPORTUNITY PLAN**
Provide a copy of the project’s Equal Opportunity Plan as outlined in Tab F of MSHDA’s Combined Application.

*See TAB F of MSHDA’s Combined Application*

- **EXHIBIT 31F – ACQUISITION/REHAB PROPOSALS**
  For proposals involving the acquisition and rehabilitation of existing property, substantiation that the rehabilitation expenditures will equal at least 15% of the bond proceeds used to acquire the building(s) and equipment.

- **EXHIBIT 31G – TENANT RELOCATION PLAN – IF APPLICABLE**
  For projects that require relocation of existing tenants to complete the necessary rehabilitation, submission of an acceptable tenant relocation plan is required.
GENERAL PARTNER/MEMBER EXPERIENCE CERTIFICATION

As part of the Qualified Allocation Plan Scoring Criteria, previous participation on the part of the General Partner/Member may be eligible for points. Specifically, as stated in Section D. 1. of the 2015-2016 Scoring Criteria, to receive consideration for previous participation:

“An Applicant must certify that the projects for which it is requesting points have maintained a positive operating cash flow from typical residential income alone and have funded reserves in accordance with the partnership or operating agreement and any applicable loan documents for the year in which each development’s last financial statement has been prepared (“successful properties”). If a particular project has not maintained positive operations as outlined above, but the GP/Member can document that they have been advancing funds to keep the project operating financially and physically maintained, points may be considered for that property. In addition, for projects that were originally structured to operate with negative operating cash flow from typical residential income but were structured with sufficient capitalized reserves to mitigate the negative operations, points may be considered if appropriate documentation can be submitted to evidence this.”

In accordance with the 2015-2016 Qualified Allocation Plan and Scoring Criteria, the undersigned hereby certifies that each of the projects listed in the attached “General Partner/Member Experience” form, and submitted for consideration for points as part of its application for Low Income Housing Tax Credit (LIHTC), meets the requirements to be considered a successful property as outlined in Section D.1. of the 2015-2016 Scoring Criteria and above. Additionally, when necessary, the undersigned has completed and submitted appropriate additional documentation to demonstrate that a project meets the criteria outlined in Section D.1. of the 2015-2016 Scoring Criteria and above. The undersigned further understands and acknowledges that any inaccuracy of the information presented with regard to previous General Partner or Member experience may be grounds for application disqualification, negative points, disqualification of future applications, or any combination of the three at the sole judgment and discretion of MSHDA.

*TOTAL NUMBER OF SUCCESSFUL PROPERTIES: ____________________
   (# of successful properties must be indicated to receive points)

___________________________________  ____________________
Printed Name, Position Title                  Date

___________________________________
Signature

On Behalf of:

___________________________________
Print Managing Member/General Partner Name

The Managing Member or General Partner of:

___________________________________
Print Owner (LDHA) Name

*Total number of properties field must be completed and the form must be signed to receive points and the number listed should match the totals submitted on the Owner/General Partner Experience page(s).
**GENERAL PARTNER/MEMBER EXPERIENCE**

This page must be included in Exhibit 12a

<table>
<thead>
<tr>
<th>General Partner/Member Name:</th>
<th></th>
</tr>
</thead>
</table>

Is the General Partner/Member shown in Section C.1 of the LIHTC Program Application?

If you answered, "No", explain the relationship between the owner shown here to the owner in the application:

Complete the chart below including ALL affordable developments the GP/Member has experience in owning and developing. Failure to fully complete this chart or clearly define the relationship between the entity(ies) shown above to the information presented in the LIHTC Program Application may result in a loss of points when applying for LIHTC.

<table>
<thead>
<tr>
<th>Name and Project Number of Project Owned</th>
<th>City and State</th>
<th>Number of Units</th>
<th>Date of Ownership (mm/dd/yy)</th>
<th>Date Project Last Placed in Service</th>
<th>Type of Financing</th>
<th>LIHTC Project?</th>
<th>Has the project materially defaulted on any obligation?*</th>
<th>Does the project have any uncorrected 8823s that have been outstanding longer than 6 months?**</th>
<th>Included in Point Total for Owner/GP Experience Points?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: ABC Apts A12345</td>
<td>Lansing, MI</td>
<td>23</td>
<td>3/1/2001</td>
<td>10/14/2008</td>
<td>5/1/2003</td>
<td>HUD 221 (d)(4)</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

* A material default on any obligation includes, but is not limited to the following: project foreclosure, filing a bankruptcy petition, or providing a deed in lieu of foreclosure. If answered yes, the project cannot be counted towards the general partner/member experience total. However, explanation can be provided on page 15 of the Addendum I.

** If the project has any uncorrected 8823s that have been outstanding longer than 6 months, then that project cannot be counted towards the general partner/member experience total. However, explanation can be provided on page 15 of the Addendum I.
**MANAGEMENT EXPERIENCE**  
*This page must be included as Exhibit 12b*

1. Management Entity:  

2. Is the management entity identified above the same as shown in Section C.4 of the LIHTC Program Application?  
   - [ ] Yes  
   - [ ] No  
   If you answered “No”, explain the relationship between the management entity shown here to the management entity in the application:  

3. Complete the chart below. Failure to fully complete this chart or clearly define the relationship between the management entity identified here and in the LIHTC Program Application may result in a loss of points when applying for LIHTC.  

<table>
<thead>
<tr>
<th>Name of Project Managed</th>
<th>City and State</th>
<th>Number of Units</th>
<th>Date of Management (mm/dd/yy)*</th>
<th>Type of Financing</th>
<th>Identify the Projects that are LIHTC**</th>
<th>Does the project have any uncorrected 8823s that have been outstanding longer than 6 months?***</th>
<th>Included in Point Total for Mgmt Experience Points?</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXAMPLE: XYZ Project</td>
<td>Ann Arbor, MI</td>
<td>33</td>
<td>04/05/02 05/03/09</td>
<td>LIHTC</td>
<td>LIHTC</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

* Must be the date rent-up began, not date of the start of construction.  
** Points will only be given to management of LIHTC projects.  
*** If the project has any uncorrected 8823s that have been outstanding longer than 6 months, then that project cannot be counted towards the management experience total. However, explanation can be provided on page 15 of this Addendum.
GENERAL PARTNER/MEMBER & MANAGEMENT ENTITY – EXPLANATION PAGE

This page must be included as part of Exhibits 12a and 12b

If answered yes for any project under the column titled “Has the project materially defaulted on any obligation?” from page 13 of this Addendum, please provide written explanation.

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Explanation</th>
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If answered yes for any project under the column titled “Does the project have any uncorrected 8823s that have been outstanding longer than 6 months?” from pages 13 or 14 of this Addendum, please provide written explanation.

☐ General Partner/Member  ☐ Management Entity

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2015-2016 LIHTC Addendum I  15  February 2015
1. Nonprofit Name:

2. Is the nonprofit entity identified above the same as shown in Section C.3 of the LIHTC Program Application?  
   - Yes  
   - No  
   If you answered “No”, explain the relationship between the nonprofit entity shown here to the nonprofit entity in the application:

3. Complete the chart below. Failure to fully complete this chart or clearly define the relationship between the nonprofit entity identified here and in the LIHTC Program Application may result in a loss of points when applying for LIHTC.

<table>
<thead>
<tr>
<th>Name of Project</th>
<th>City and State</th>
<th>Number of Units</th>
<th>Date of Nonprofit Involvement (mm/dd/yy)</th>
<th>Type of Involvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXAMPLE: XYZ Project</td>
<td>Ann Arbor, MI</td>
<td>33</td>
<td>04/05/00 06/04/10</td>
<td>Rehabilitated 5 houses with city money.</td>
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</tbody>
</table>

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<thead>
<tr>
<th>Name of Project</th>
<th>City and State</th>
<th>Number of Units</th>
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</table>
CERTIFICATION TO APPLICATION – MANDATORY
INITIAL APPLICATION

The undersigned is responsible for ensuring that the project consists or will consist of a qualified low income building or buildings as defined in Section 42 of the Internal Revenue Code of 1986, as amended, and will satisfy all applicable requirements of federal tax law in the acquisition, rehabilitation, or construction and operation of the project to receive the low income housing tax credit.

The undersigned is responsible for the inclusion of green standards set forth in the Green Policy for which points were awarded or which are required to meet threshold requirements. These features must be included in the architectural plans as well as in the final completed project.

The undersigned is responsible for all calculations and figures relating to the determination of the eligible basis and qualified basis for any building or buildings and understands and agrees that the amount of credit reserved or allocated hereunder has been calculated pursuant to the representations made herein, and further, that all representations contained herein, whether with respect to costs or any other item, are considered material to the application. Additionally, the undersigned understands that the material inaccuracy of any of the information presented in any part of the application or accompanying exhibits may be grounds for application disqualification, negative points, disqualification of future applications, or any combination of the three at the sole judgment and discretion of MSHDA.

The undersigned, on behalf of the ownership entity that will be the owner of the project agrees that the Owner will sign IRS form 8821, Tax Information Authorization, authorizing the Internal Revenue Service to provide the Michigan State Housing Development Authority with information pertaining to this project, if MSHDA should request the form from the Owner at any time.

The undersigned agrees that the Michigan State Housing Development Authority will at all times be held harmless against any losses, costs, damages, expenses, or liabilities whatsoever, of any kind, including but not limited to attorney fees, litigation costs, amounts paid in settlement, or any loss of whatsoever nature directly or indirectly resulting from, arising out of, or related to consideration, approval, disapproval, or acceptance of this request for tax credit.

The Michigan State Housing Development Authority offers no advice, opinion, or guarantees that the applicant or the proposed project will ultimately qualify for or receive low income housing tax credit.

Any Reservation or Carryover received as a result of filing this application shall not bind the Michigan State Housing Development Authority to issue a low income housing tax credit.

An application fee in the amount of $____ is enclosed. This fee represents the sum of $45 for each proposed low income unit, with a maximum of $2,500.

Dated: ____________    Name of Project: ____________________________

Owner: ________________________________

By: ________________________________

Its: ________________________________
CERTIFICATION TO INCLUDE SECTION 8 EXISTING RENTAL ALLOWANCE PROGRAM CERTIFICATE AND VOUCHER HOLDERS

The undersigned agrees to include Section 8 Existing Rental Allowance Program certificate and voucher holders on the project’s waiting list and to give them consideration.

The undersigned also agrees to give priority to persons whose names are on appropriate Public Housing or Housing Choice Voucher waiting lists maintained by a Public Housing Commission (PHC) or Public Housing Agency (PHA) in the area in which the project is located and further states it will make ongoing efforts to request that the PHC and/or PHA make referrals to the project, and place the relevant project information on any listing the PHC or PHA makes available to persons on their waiting lists. A copy of the written statement and documentation of ongoing efforts as evidenced by a referral agreement or other appropriate memorandum of commitment MUST be kept on file at the development’s office and available for compliance inspection and review at all times.

If there is no PHA or PHC in the area in which the project is located, the undersigned will contact the Section 8 Existing Rental Allowance Program affiliated with the Michigan State Housing Development Authority (MSHDA). Contact will be made in writing on a yearly basis throughout the compliance period notifying the MSHDA representative in the county in which the project is located that consideration will be given to eligible Section 8 certificate or voucher holders.

Dated: _______________ Name of Project: ________________________________

Owner: ________________________________

By: ________________________________

Its: ________________________________
AGENCY POLICY ON CIVIL RIGHTS COMPLIANCE:

The undersigned and any of its employees, agents or sub-contractors in doing business with the Michigan State Housing Development Authority (the “Authority”) understands and agrees that it is the total responsibility of the owner/developer/borrower to adhere to and comply with all Federal Civil Rights legislation along with any required related codes and laws. Should the Authority not specify any specific requirements, such as design, it is none the less the owner’s responsibility to be aware of and comply with all non-discrimination provisions relating to race, color, religion, sex, handicap, familial status, national origin and any other classes protected in the State of Michigan. This includes, but is not limited to, design requirements for construction or rehabilitation, Equal Opportunity in regard to marketing and tenant selection and reasonable accommodation and modification for those tenants covered under such laws.

Dated: _______________  Name of Project: _________________________________

Owner: _______________________________

By: _________________________________

Its: _________________________________
The undersigned acknowledges that it is familiar with the issuance of Private Letter Rulings by the Internal Revenue Service, and that it has discussed the substance of any rulings that may be applicable with its Certified Public Accountant and Attorney. It is further acknowledged that any applicable Private Letter Rulings may have an impact on the project’s eligible basis, and the amount of credit that may be allocated to the project.

Dated: _______________  Name of Project: ________________________________

Owner: ________________________________

By: ________________________________

Its: ________________________________
Name of Project ____________________________________________

Owner ☐ Management Company ☐

MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY
LOW INCOME HOUSING TAX CREDIT PROGRAM
AUTHORIZATION FOR RELEASE OF INFORMATION

Date: ____________________________

Please duplicate this form and submit one for each state, EXCEPT MICHIGAN, in which any sponsor listed in this tax credit application has an ownership interest in a tax credit assisted project, and one for the management company that is listed in this tax credit application that has management experience of a tax credit assisted development. Forms should also be filled out for project owners or management companies who have done business under a different name or names.

Low Income Housing Tax Credit Administrator
______________________________________________ Housing Credit Agency
(State)

______________________________________________
(Street Address)

______________________________________________
(City, State, Zip)

We hereby request and authorize you to release to the Michigan State Housing Development Authority (MSHDA) any information that you have regarding ____________ (Please check only one box. ☐ owner and/or ☐ management company) as it relates to project compliance, the curing of or failure to cure any project noncompliance, and any formal or informal action taken by your agency with respect to ____________ ‘s (owner and/or management company) participation in your Low Income Housing Tax Credit Program. Other data that would be relevant to MSHDA in its assessment of their development experience and compliance record would be appreciated. If you have any questions, please contact Carol Thompson at (517) 373-6007. Thank you in advance for your cooperation.

Company: ________________________________ By: ________________________________
(Signature)

Name: ________________________________
(Typed)

It’s: ________________________________
(Title)

Identify below the name(s) of the project(s) you have an ownership interest in and/or manage in the above-identified state (attach additional pages as necessary):

1. ________________________________ 5. ________________________________
2. ________________________________ 6. ________________________________
3. ________________________________ 7. ________________________________
4. ________________________________ 8. ________________________________
SPONSOR CERTIFICATION - MANDATORY

This certification must be signed by each sponsor of the project. If there is more than one sponsor, this page must be duplicated.

The undersigned hereby certifies that neither I, nor any company with whom I am affiliated, is currently banned or involved in litigation with any other state credit allocating agency as of this date.

Company: ____________________________  By: ____________________________
(Signature)

Date: ____________________________  Name: ____________________________
(Typed)

It’s: ____________________________
(Title)

A SPONSOR THAT IS BANNED FROM PARTICIPATION IN THE TAX CREDIT PROGRAM IN ANOTHER STATE WILL BE BANNED FROM SUBMITTING AN APPLICATION IN MICHIGAN FOR THE SAME PERIOD OF TIME. INVOLVEMENT IN LITIGATION WILL NOT AUTOMATICALLY RESULT IN A RETURNED APPLICATION, BUT THE AUTHORITY WILL REVIEW THE FACTS AND CIRCUMSTANCES SURROUNDING THE LITIGATION.

The undersigned hereby certifies that I, or a company with whom I am affiliated, is involved in litigation with another allocating agency at the time of submission of this application. The details of the litigation are outlined below.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Company: ____________________________  By: ____________________________
(Signature)

Date: ____________________________  Name: ____________________________
(Typed)

It’s: ____________________________
(Title)
WAIVER OF RIGHT TO EXTENDED USE PERIOD TERMINATION - MANDATORY

In accordance with Michigan’s Qualified Allocation Plan, the Applicant hereby waives the right to termination of the extended use period provided by Section 42(h) (6) (E) (i) (II) of the Internal Revenue Code.

Section 42(h) (6) of the Internal Revenue Code provides:

(6) BUILDINGS ELIGIBLE FOR CREDIT ONLY IF MINIMUM LONG-TERM COMMITMENT TO LOW-INCOME HOUSING.---
(A) IN GENERAL.---No credit shall be allowed by reason of this section with respect to any building for the taxable year unless an extended low-income housing commitment is in effect as of the end of such taxable year.

(E) EXCEPTIONS IF FORECLOSURE OR IF NO BUYER WILLING TO MAINTAIN LOW-INCOME STATUS.---
(i) IN GENERAL.---The extended use period for any building shall terminate---
(I) on the date the building is acquired by foreclosure (or instrument in lieu of foreclosure) unless the Secretary determines that such acquisition is part of an arrangement with the taxpayer a purpose of which is to terminate such period, or
(II) on the last day of the period specified in subparagraph (I) if the housing credit agency is unable to present during such period a qualified contract for the acquisition of the low-income portion of the building by any person who will continue to operate such portion as a qualified low-income building. Subclause (II) shall not apply to the extent more stringent requirements are provided in the agreement or in State law.

Should a buyer be sought for a low-income housing development in the fourteenth year of the compliance period, the Applicant acknowledges that the Michigan State Housing Development Authority will not be obligated to find a buyer for the property. Furthermore, the extended use period will not terminate if a buyer cannot be found.

This waiver must be signed by the owner or an authorized agent thereof.

__________________________________________  __________________________________________
Signature                                      Printed Name

__________________________________________  __________________________________________
Title                                          Organization
DEVELOPMENT TEAM INFORMATION FORM
(This form must be completed for each member of the Development Team)

According to Threshold Requirement XIII found in Exhibit I of the 2015-2016 Qualified Allocation Plan,

Proposals submitted wherein any member of the Development Team (v) has failed to pay any fee or expense due to the Authority in connection with any Authority-sponsored program (w) has been determined to be in default or in major non-compliance with LIHTC or any other MSHDA program, (x) has been debarred or suspended from any MSHDA, HUD, or Rural Housing programs, (y) is in foreclosure or been foreclosed, or (z) is under felony investigation, indicted or been convicted of a felony, will automatically be disqualified until the event or events of default, debarment, suspension, foreclosure, non-compliance, or other legal action are corrected or resolved.

All applicants shall submit the following information for each member of the “Development Team” for purposes of determining any areas of noncompliance or disqualification status.

NAME: ____________________________________________

CAPACITY:  
☐ Applicant Entity  ☐ Proposed Owner  
☐ Principal of owner/Applicant  ☐ Developer  
☐ General Contractor  ☐ Developer/Syndication Consultant  
☐ Property Mgmt. Company  
☐ Related party(ies) or entities in the seller of any land or property  
☐ Other, Describe ____________________________________________

Please list all tax credit developments that the entity listed above has participated in during the three years preceding this application submission.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Has this entity been involved in any felony criminal convictions, indictments, or pending criminal investigations?  ☐ Yes  ☐ No

If yes, please provide the details of each circumstance, unless prohibited by court order, statute or regulation.

________________________________________________________________________

________________________________________________________________________

PLEASE NOTE:
(If funded, upon MSHDA request, all “Development Team” members will be required to supply their Name, Address, S.S.N., and D.O.B. for purposes of completing background checks.)

Signature ____________________________________________  Printed Name ____________________________________________
APPLICANT PREVIOUS EXPERIENCE CERTIFICATION

As part of the Qualified Allocation Plan Scoring Criteria, poor previous participation on the part of the Applicant will be penalized in the form of negative points. In order to assist in the implementation of this process, the following questions must be answered and certified to their accuracy on behalf of all entities (including any affiliated entity or individual) that will have an ownership interest in the development (excluding syndicators, investor limited partners, or investor members). The Michigan State Housing Development Authority (“MSHDA”) retains the right to request further clarification or information based on the responses to questions below if it is determined necessary.

1. Has any entity (including any affiliated entity or individual) ever been removed from a Limited Partnership or Limited Liability Company that was in the business of owning and operating rental housing for any reason including but not limited to committing a default under the Partnership Agreement or Operating Agreement? If so, please explain.
   □ Yes □ No

2. Does any entity (including any affiliated entity or individual) have any current outstanding HUD 2530 violations for any rental properties in which it currently retains an ownership interest? If so, please explain.
   □ Yes □ No

3. Does any entity (including any affiliated entity or individual) have any current outstanding program compliance violations for any Rural Housing Services (RHS) funded rental properties in which it retains an ownership interest? If so, please explain.
   □ Yes □ No

4. Does any entity (including any affiliated entity or individual) have any current outstanding program compliance violations for any HOME funded rental properties in which it retains an ownership interest? If so, please explain.
   □ Yes □ No

5. Has any entity (including any affiliated entity or individual) been involved with any other events of noncompliance with federal housing programs that has not been covered in the
responses above? If so, please explain.
☐ Yes  ☐ No

6. Has any entity (including any affiliated entity or individual) been assessed a Regulatory or Mortgage default, or been subject to a foreclosure or a deed in lieu of foreclosure for any rental property in which it retained an ownership interest? If so, please explain.
☐ Yes  ☐ No

To the best of my knowledge and belief, I hereby certify that the above answers and information are true and correct for all entities (including any affiliated entity or individual) that will have an ownership interest in the development (excluding syndicators, investor limited partners, or investor members). I understand that the material inaccuracy of the information presented above may be grounds for application disqualification, negative points, disqualification of future applications, or any combination of the three at the sole judgment and discretion of MSHDA.

___________________________________  ____________________________________
Printed Name, Position Title  Date

_______________________________
Signature

On behalf of:

_______________________________
Print Managing Member/General Partner Name

The Managing Member or General Partner of:

_______________________________
Print Owner (LDHA) Name
The undersigned agrees that it shall post signage at the project construction site listing the Michigan State Housing Development Authority (MSHDA) as a financing source should the referenced project receive an award of Low Income Housing Tax Credit (LIHTC).

Dated: _____________  Name of Project: ________________________________

Owner: ________________________________

By: ________________________________

Its: ________________________________
ARCHITECT’S CERTIFICATION
RE: MICHIGAN PRODUCTS

Under Michigan’s Qualified Allocation Plan for 2015-2016, projects must demonstrate the use of products and goods that are manufactured by Michigan-based corporations and incorporate them into the proposed development.

By signing this form, the architect hereby certifies that the Construction Documents for the proposed development incorporate the following (applicants may subdivide the table below):

<table>
<thead>
<tr>
<th>Product</th>
<th>Manufacturer</th>
<th>Manufacturer’s Address</th>
</tr>
</thead>
</table>

After construction has been completed, the architect shall verify the use of the products listed above and report any discrepancies to the Authority.

The Authority reserves the exclusive right to determine whether a manufacturer is “Michigan-based.” Failure to adhere to this certification is the responsibility of the Applicant and may result in future negative points, which may further result in a future project not being funded.

______________________________
Project Name

______________________________  ______________________________
Applicant Signature                Applicant Name

______________________________  ______________________________
Architect’s Signature             Architect’s Printed Name

______________________________
Title                        Organization
ARCHITECT’S CERTIFICATION
VISITABLE UNITS

Projects that incorporate “visitability” design features into all units with first floor living space or access to units by elevator will receive points. The following design items are required for a unit to be considered visitable:

- No step entry
- Barrier free parking - with ramps as needed
- Barrier free entry door
- Barrier free ½ bath on first floor
- Electrical switches at reachable heights
- Accessible route through the first floor living space

By signing this certification, the Architect and the Applicant hereby certify the proposed project will incorporate the number of visitable units listed below.

Number of units with all visitability design features: _______________

Total number of units in the project: ____________

Total units with first floor living space or accessible by an elevator: _______________
(If the project has an elevator and the total number of units in the project doesn’t match the total units with first floor living space or accessible by an elevator, please explain in the narrative in Exhibit 1.)

__________________________________________
Project Name

_____________________________  ____________________________
Applicant’s Signature                Applicant Name

_____________________________  ____________________________
Architect’s Signature               Architect’s Name

Title  Organization
ARCHITECT’S CERTIFICATION
BARRIER FREE

Projects that commit to building 10% of the units within the development according to barrier free or fully adaptable to barrier free standards will receive points.

By signing this certification, the Architect and Applicant hereby certify the proposed project will incorporate the number of barrier free units listed below.

Total number of units that will be barrier free or fully adaptable to barrier free standards: __________

Total number of units in the project: __________

Percentage of barrier free or fully adaptable to barrier free units in the project: __________

________________________________________
Project Name

_______________________________
Applicant’s Signature

________________________________
Applicant Name

_______________________________
Architect’s Signature

________________________________
Architect’s Name

_______________________________
Title

________________________________
Organization

Include in Exhibit 24C

Include in Exhibit 24D
ARCHITECT’S CERTIFICATION
PROJECT SQUARE FOOTAGE

Projects will be assessed points for cost efficiency based on their Total Development Costs per square foot in the project, excluding commercial space that is not a part of the housing project application being proposed.* All applicants must submit this certification and all projects must be evaluated for Cost Containment points found in Section I of the Scoring Criteria.

The Architect and Applicant certify the following square footage is accurate for the proposed project.

Total Common Space square footage: ______________

Total LIHTC unit square footage: ______________

Total Market Rate unit square footage: ______________

Total Employee unit square footage: ______________

**Total Project square footage:** ______________

______________________________
Project Name

______________________________
Applicant’s Signature

______________________________
Applicant Name

______________________________
Architect’s Signature

______________________________
Architect’s Name

______________________________
Title

______________________________
Organization

*Please note: for purposes of points in the Scoring Criteria, Section G, #1, square footage of the following is not includable in the cost containment calculation: basements, garages, carports, parking lots, parking structures, sidewalks or other similar items. Please refer to Scoring Criteria, Section G, #1 for more detailed information regarding the point calculation.