

APPLICATION CHECKLIST

Application Checklists & Fees

<input type="checkbox"/>	Application Checklist
<input type="checkbox"/>	Portfolio Checklist (if applicable)
<input type="checkbox"/>	Application Fee

Tab 1: Project Summary

Form 1A	<input type="checkbox"/>	Project Summary
Form 1B	<input type="checkbox"/>	Units & Square Footage
Form 1C	<input type="checkbox"/>	Unit Information by Building
Attachments	<input type="checkbox"/>	Architectural Rendering or Pictures of Development (pdf or jpg)
	<input type="checkbox"/>	Novogradac Income Averaging Worksheet (if applicable)

Tab 2: Project Description

Form 2A	<input type="checkbox"/>	Project Description
Form 2B	<input type="checkbox"/>	ESDS Project Checklist
Form 2C	<input type="checkbox"/>	Acquisition Credit
Attachments	<input type="checkbox"/>	Documentation of Site Control
	<input type="checkbox"/>	Title Report
	<input type="checkbox"/>	Project Priority Survey (ESDS)
	<input type="checkbox"/>	Evergreen Owner Certification
	<input type="checkbox"/>	Acquisition Credit: Documentation of compliance with 10 year rule
Community Revitalization Plan (CRP)		
<input type="checkbox"/>	Map showing the project is located within a Washington State Urban Growth Boundary; or	
<input type="checkbox"/>	Map showing the project is located within a federal, state, regional, or local community revitalization plan area; or	
<input type="checkbox"/>	Map showing the project is located within a QCT and in one of the following locations;	
<input type="checkbox"/>	High or Very High on the Comprehensive Opportunity Index; or	
<input type="checkbox"/>	In an area of low Environmental Health Disparity	

Tab 3: Population Served

Form 3	<input type="checkbox"/>	Population Served
Attachments	<input type="checkbox"/>	Market Study
	<input type="checkbox"/>	Consistency with Consolidated Plan Letter
	<input type="checkbox"/>	Notification of Public Housing Authority

Tab 4: Relocation

Form 4	<input type="checkbox"/>	Relocation
Attachments	<input type="checkbox"/>	Relocation Plan
	<input type="checkbox"/>	Approval Letter from local government agency with jurisdiction over tenant relocation

Tab 5: Project Schedule

Form 5	<input type="checkbox"/>	Project Schedule
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Tab 6: Development Budget

Form 6A	<input type="checkbox"/>	Project Sources and Uses
Form 6B	<input type="checkbox"/>	LIHTC Eligible Basis
Form 6C	<input type="checkbox"/>	LIHTC Calculation
Form 6D	<input type="checkbox"/>	Total Development Cost Limit Calculation
Attachments	<input type="checkbox"/>	Documentation of QCT status for 130% Basis Boost
	<input type="checkbox"/>	Total Development Cost Limit Exemption/Waiver Request and Approval Letter

Tab 7: Project Financing

Form 7A	<input type="checkbox"/> Financing Terms
Form 7B	<input type="checkbox"/> Historic Rehabilitation Tax Credits
Attachments	<p>Permanent Lender</p> <input type="checkbox"/> A copy of the Permanent Lender's signed term sheet accepted by the borrower <input type="checkbox"/> Proof of Appraisal deposit
	<p>Construction Lender</p> <input type="checkbox"/> A copy of the Construction Lender's signed term sheet accepted by the borrower <input type="checkbox"/> Proof of Appraisal deposit
	<p>Tax Credit Investor</p> <input type="checkbox"/> Copy of the Investor's Letter of Intent
	<p>Projects with Developer Equity:</p> <input type="checkbox"/> Certification of Ability to Contribute Equity to the Project
	<p>Projects with Leveraged Funds:</p> <input type="checkbox"/> Copies of Funders' Commitment Letters
	<p>Projects using FHA Insurance</p> <input type="checkbox"/> A copy of "Invitation to Submit" letter
	<p>Projects requesting Subsidy Layering Review</p> <input type="checkbox"/> Subsidy Layering Review Request Memorandum
	<p>USDA Rural Development Projects</p> <input type="checkbox"/> A letter from RD indicating that a complete application for each of the properties has been submitted to RD
	<p>Historic Rehabilitation Tax Credits</p> <input type="checkbox"/> Itemized breakdown of the residential Qualified Rehabilitation Expenses, the commercial or other non-residential Qualified Rehabilitation Expenses, the total Qualified Rehabilitation expenses <input type="checkbox"/> Explanation of any differences in the residential Qualified Rehabilitation Expenses and the Total Project Costs <input type="checkbox"/> Detailed calculation of the Historic Rehabilitation Tax Credit proceeds for the Residential portion of the project
	<p>Utility Incentive Form</p> <input type="checkbox"/> Completed Utility Incentive Contact Form

Tab 8: Project Operations

Form 8A	<input type="checkbox"/> Project Rents
Form 8B	<input type="checkbox"/> Operating Pro Forma
Attachments	<input type="checkbox"/> Documentation of utility allowance calculations and schedule <p>Projects with Rental Assistance:</p> <input type="checkbox"/> Copy of the Rental Subsidy Contract

Tab 9: Development Team

Form 9A	<input type="checkbox"/> Developer and Ownership
Form 9B	<input type="checkbox"/> Property Management History and Resumes
Form 9C	<input type="checkbox"/> Development Team Contact List
Form 9D	<input type="checkbox"/> Identity of Interest Information
Attachments	<input type="checkbox"/> Development Consultant Agreement <input type="checkbox"/> Certification Regarding Financial Solvency and Litigation Status <input type="checkbox"/> Consent Granting Signature Authority <input type="checkbox"/> IRS notification of Ownership Entity's federal identification number <input type="checkbox"/> Secretary of State Certificate of Existence for Ownership Entity <input type="checkbox"/> Organizational chart identifying each entity or individual with an ownership interest in the Project, including percentage of ownership <input type="checkbox"/> Property Management Agreement or Letter of Intent <input type="checkbox"/> Resumes of Property Management Team <input type="checkbox"/> List of properties managed
Nonprofit Sponsor	<input type="checkbox"/> Nonprofit Organization's IRS determination letter <input type="checkbox"/> Articles of incorporation as filed with the Sec. of State <input type="checkbox"/> Bylaws and/or other governing instruments of the organization <input type="checkbox"/> Evidence of ownership and material participation <input type="checkbox"/> Certification Nonprofit is not affiliated with a for-profit organization <input type="checkbox"/> Board member list

Tab 10: Bond/Tax Credit Program Scoring

Form 10 Scoring Worksheet

Attachments

Cost Efficient Development

TDC Boosts only: Form of construction cost estimate from the General Contractor (GC). Please highlight the relevant costs in the estimate provided.

TDC Boosts only: Narrative explaining what applicable cost drivers were included in the proposed development and what benefits, if any, they will provide. Please also explain how the cost for each 'boost' submitted in the application was derived.

Overcoming Historic and Systemic Barriers for Developers who are Black, Indigenous, or People of Color

Nonprofit only: List of board members/ED self-certification form(s)

For-profit only: documentation of >50% ownership of firm by BIPOC individuals that defines specific duties, roles, and financial breakdown of fees

Partnerships only: agreement executed between the partnering entity(ies) that defines specific duties, roles, and financial breakdown of fees and risks

Projects that are By and For the Community

Community Based Organization Response Form (completed by CBO representative)

For points in Long-term ownership category: agreement executed between the partnering entity(ies) that defines Year 15 provisions

Benefit Agreement with Community Based Organization (provided by CBO) if applicable

Community Engagement Response Form

Property Type

Adaptive Reuse: Letter from project architect

Historic: Evidence of historic designation and completion of Form 7B

Brownfield: Phase II Environmental Site Assessment and remediation plan

Solar Options (New Construction and Rehab)

Architect's Certification

Solar Contractor's Assessment

Electric Vehicle Charging Stations (New Construction and Rehab)

Site Plan

Energy Efficient Buildings (New Construction)

Compliance Summary

Heat Pump Option (Rehab)

Compliance Summary

Balanced Ventilation with Wildfire Smoke Filters Option (Rehab)

Compliance Summary

Rehabilitation of Major Systems (Preservation)

Capital Needs Assessment (CNA)

Installation of Broadband (Preservation)

Architect's Certification