

## 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

<b>Form 1A</b>	<input type="checkbox"/>	Project Summary
<b>Form 1B</b>	<input type="checkbox"/>	Units & Square Footage
<b>Form 1C</b>	<input type="checkbox"/>	Unit Information by Building
<b>Attachments</b>	<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

<b>Form 2A</b>	<input type="checkbox"/>	Project Description
<b>Form 2B</b>	<input type="checkbox"/>	ESDS Project Checklist
<b>Form 2C</b>	<input type="checkbox"/>	Acquisition Credit
<b>Attachments</b>	<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
<b>Community Revitalization Plan (CRP)</b>		
	<input type="checkbox"/>	Map showing the project is located within a Washington State Urban Growth Boundary; <b>or</b>
	<input type="checkbox"/>	Map showing the project is located within a federal, state, regional, or local community revitalization plan area; <b>or</b>
	<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; <b>or</b>
	<input type="checkbox"/>	In an area of low Environmental Health Disparity

### Tab 3: Population Served

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

### Tab 4: Relocation

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

### Tab 5: Project Schedule

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

<b>Form 6A</b>	<input type="checkbox"/>	Project Sources and Uses
<b>Form 6B</b>	<input type="checkbox"/>	LIHTC Eligible Basis
<b>Form 6C</b>	<input type="checkbox"/>	LIHTC Calculation
<b>Form 6D</b>	<input type="checkbox"/>	Total Development Cost Limit Calculation
<b>Attachments</b>	<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**

<b>Form 7A</b>	<input type="checkbox"/> Financing Terms
<b>Form 7B</b>	<input type="checkbox"/> Historic Rehabilitation Tax Credits
<b>Attachments</b>	<p><b>Permanent Lender</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> A copy of the Permanent Lender's signed term sheet accepted by the borrower</li> <li><input type="checkbox"/> Proof of Appraisal deposit</li> </ul> <p><b>Construction Lender</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> A copy of the Construction Lender's signed term sheet accepted by the borrower</li> <li><input type="checkbox"/> Proof of Appraisal deposit</li> </ul> <p><b>Tax Credit Investor</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Copy of the Investor's Letter of Intent</li> </ul> <p><b>Projects with Developer Equity:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Certification of Ability to Contribute Equity to the Project</li> </ul> <p><b>Projects with Leveraged Funds:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Copies of Funders' Commitment Letters</li> </ul> <p><b>Projects using FHA Insurance</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> A copy of "Invitation to Submit" letter</li> </ul> <p><b>USDA Rural Development Projects</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> A letter from RD indicating that a complete application for each of the properties has been submitted to RD</li> </ul> <p><b>Historic Rehabilitation Tax Credits</b></p> <ul style="list-style-type: none"> <li><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</li> <li><input type="checkbox"/> Explanation of any differences in the residential Qualified Rehabilitation Expenses and the Total Project Costs</li> <li><input type="checkbox"/> Detailed calculation of the Historic Rehabilitation Tax Credit proceeds for the Residential portion of the project</li> </ul> <p><b>Utility Incentive Form</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Completed Utility Incentive Contact Form</li> </ul>

**Tab 8: Project Operations**

<b>Form 8A</b>	<input type="checkbox"/> Project Rents
<b>Form 8B</b>	<input type="checkbox"/> Operating Pro Forma
<b>Attachments</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Documentation of utility allowance calculations and schedule</li> </ul> <p><b>Projects with Rental Assistance:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Copy of the Rental Subsidy Contract</li> </ul>

**Tab 9: Development Team**

<b>Form 9A</b>	<input type="checkbox"/> Developer and Ownership
<b>Form 9B</b>	<input type="checkbox"/> Property Management History and Resumes
<b>Form 9C</b>	<input type="checkbox"/> Development Team Contact List
<b>Form 9D</b>	<input type="checkbox"/> Identity of Interest Information
<b>Attachments</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Development Consultant Agreement</li> <li><input type="checkbox"/> Certification Regarding Financial Solvency and Litigation Status</li> <li><input type="checkbox"/> Consent Granting Signature Authority</li> <li><input type="checkbox"/> IRS notification of Ownership Entity's federal identification number</li> <li><input type="checkbox"/> Secretary of State Certificate of Existence for Ownership Entity</li> <li><input type="checkbox"/> Organizational chart identifying each entity or individual with an ownership interest in the Project, including percentage of ownership</li> <li><input type="checkbox"/> Property Management Agreement or Letter of Intent</li> <li><input type="checkbox"/> Resumes of Property Management Team</li> <li><input type="checkbox"/> List of properties managed</li> </ul>
<b>Nonprofit Sponsor</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Nonprofit Organization's IRS determination letter</li> <li><input type="checkbox"/> Articles of incorporation as filed with the Sec. of State</li> <li><input type="checkbox"/> Bylaws and/or other governing instruments of the organization</li> <li><input type="checkbox"/> Evidence of ownership and material participation</li> <li><input type="checkbox"/> Certification Nonprofit is not affiliated with a for-profit organization</li> <li><input type="checkbox"/> Board member list</li> </ul>

**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

