**2025 Form A [Draft] Revision Tracker**

*March 13, 2024*

**Cover (p 1)**

* **Title:** Changed to “2025 9%, 4% LIHTC/Bond/AWHTC Initial Application”

**Submission Checklist (p 3)**

* **J. Evidence of Compliance**
  + Added “Affidavit **(Form Q)** from each…”
* **5.4 Minimum Development Standards**
  + Relabeled “Minimum Unit Sizes” from “D” to “F” to match QAP
* **6.2 – Development Characteristics**
  + Re-labeled **Preservation, Infill,** and **Historic in Nature** sections to match their order in QAP
  + Removed “Abandoned” from “**H. Foreclosed and Disaster-Affected”**
    - Removed “Evidence from the mortgage lender or tax authority” from required documents
  + Under “**I. Community Revitalization Plan**” removed **“Bonus point for LUG adoption**”
  + Removed **“J. Federally Assisted Revitalization Award**”
  + Removed **“K. Offsite Improvement”**
* **Part 6.3 – Sustainable Development Characteristics**
  + Removed “**B. Water Conservation”**
* **Part 6.5 – Other**
  + Added “**C. Emerging XBE Developers”**
  + Added “**Unique Features Form R”** under **“Unique Features”**
  + Removed language about third party MOU from **“E. CORES Certification”**
  + Added “**G. Eviction Prevention Plan”**
  + Added **“H. Low-Barrier Tenant Screening**”
  + Added **“Developments from Previous Institutes**”

**Scoring – Affordability (p 4)**

* **A. Rent Restrictions**
  + Added **[9% ONLY]** to section title
* **[Removed C. Owner-Paid Utilities]**
* ***Updated subtotal: 27 possible points***
* ***Updated formula for subtotals C22 & D22***

**Scoring – Dev Character (p 5)**

* **B. Accessible/Adaptable Units**
  + Added “8.0-10.9%” row, New Construction – 1 point
  + Removed “New Construction – 1 point” from “8.0-8.9%” row
  + Changed “10.0-11.9%” to “11.0-13.9%,” New Construction – 3 points
  + Added “10.0-99.9%” row, Rehab/Adaptive Reuse – 5 points
  + Changed “12-99.9% to “14.0-99.9%
  + Clarified point distribution in chart
  + Updated chart numbering accordingly
    - *I will gladly accept suggestions for ways to streamline this chart*
* **E. Preservation of Existing Affordable Housing**
  + Moved up from Section F to align with new QAP
  + **E.1.** Added language about extended use period and reworded for clarity: *“RHTC development with compliance period OR extended use period that has expired/will expire in the current year.”*
* **F. Infill New Construction**
  + Moved up from Section G to align with new QAP
* **G. Development is Historic in Nature**
  + Moved down from Section E to align with new QAP
  + Added “or a local landmark” to scoring criteria G. b.
  + Updated reference to QAP pgs. 58-59 to 64-65
* **H. Foreclosed and Disaster-Affected**
  + Removed “Abandoned” from title
* **I.a. Community Revitalization Plan**
  + Removed “b.1. If the plan has been adopted by a local unit of government…”, 1 point
* **[J. Federally Assisted Revitalization Award (4 points)**
  + Removed category]
* **[K. Off-Site Improvement**
  + Removed category]
* **J. Tax Credit Per Unit**
  + Re-labelled from “L” due to elimination of previous categories
* **K. Internet Access**
  + Re-labelled from “M” due to elimination of previous categories
  + Removed row for “infrastructure is provided in each unit,” 1 point
* ***Updated subtotal: 54 points possible***
* ***Fixed formula for point subtotals in C111 and D111***

**Scoring – Sustainable Dev (p 6)**

* **[B. Water Conservation**
  + Removed category
  + All following categories’ numbering has been adjusted accordingly]
* **C. Desirable Sites**
  + **a. Proximity to Amenities** 
    - added “up to” to point indication: “(up to 3 points)”
* ***Updated point subtotal: 15 possible points***
* ***Fixed formula for point subtotals in C37 and D37***

**Scoring – Fin and Marketing (p 7)**

* **C. Unit Production in Areas Underserved by the 9% RHTC Program**
  + Changed section title from “Previous 9% Tax Credit Funding”
  + Added **[9% ONLY]** to section title
  + Changed points possible to “up to 14 points”
  + Added rows for point options within LUG (3, 5, 7 points)
  + Added rows for point options within county (3, 5, 7 points)
* **E. Housing Need Index**
  + **2. Rent burden** – updated % required from 42% to 44%
  + Added **5. “Located in a county in which the ration of RHTC units to renter households below 80% AMI is below state ratio”**
  + Added **6. “Located in a county in which the highest number of units were built in 1939 or earlier”**
  + Added **7. “Located in a county in which the percent of "vacant and available units" is below the state average”**
  + Possible points updated to 7
* ***Fixed formula for point subtotals in C62 and D62***
* ***Updated point subtotal: 36 points possible***

**Scoring – Other (p 8)**

* Added **C. Emerging XBE Developer (Max 5 points)**
* **D. Unique Features**
  + Updated max points to 3
  + Required document updated to **“Unique Features Form R”**
* **E. Resident Services**
  + Relabeled from "D” with addition of new category
  + Added **4. Onsite Daycare/Adult Day Center (5 points)**
  + Updated section point total to **17**
  + Added **Place in Tab T** to required documents section
* **G. Eviction Prevention Plan** 
  + Re-named from “Reducing the impact of eviction”
  + Removed rows that pertained to low-barrier tenant screening (now next section)
  + Clarified required documents
* Added **H. Low-barrier tenant screening (up to 4 points)**
  + Added point selections:
    - 1. Plan does not screen for misdemeanors
    - 2. Plan does not screen for felonies older than 5 years
    - 3a. Plan does not screen for evictions older than 12 months
    - 3b. Plan does not screen for evictions older than 6 months
* Added **“I. Owners Who Have Requested Release Through Qualified Contract (Max 4-point reduction)”** 
  + [Updated from unlabeled category with the same title]
  + Added point selections:
    - 1. Qualified Contract requested for one project after 1/25/2021 (-2 points)
    - 2. Qualified Contract requested for multiple projects after 1/25/2021 (-4 points)
    - 3. Foreclosure that resulted in release of extended use period (-4 points)
* Added “**J. Developments from Previous Institutes”**
* **[Removed category “H. Existing 8609 for Developer]**
* ***Updated point subtotal: 45 points possible***
* ***Fixed formula for point subtotals in C59, D59, C64. D64***
* ***Fix formula for Total Development Score C66, D66***

## Form A – Threshold

**Development Info (p 9)**

* Set asides
  + Created space for 9% set-asides and 4% geographic set-asides

**Development Team (p 14)**

* Added text **“Please submit Form Q (Affidavit) for each team member”** to heading

**Threshold (p 16)**

* Removed **17. Smart Use Training**
  + Renumbered all following sections accordingly

**Dev. Characteristics (p 18)**

* **8.** Removed “abandoned” as an option in **Foreclosed/Abandoned** scoring category
* **9.** Removed “b. Has the plan been adopted by a LUG?” in the **Community Revitalization Plan Category**
* **10.** Removed **Federally Assisted Program** category
* **11.** Removed **Offsite Improvement** category

**Sustainable Dev Char (p 19)**

* **K1.** Added “Passive House” as an option for **Building Certification**
* Removed **2. Water Conservation** category

**Other (p 21)**

* Added “**3. Is the Applicant an emerging XBE Developer?”**
* Removed “third party organization” and “MOU with third party” from **5. CORES Certification**
* Added “**7. Onsite Daycare/Before and After School Care/Adult Day”**
* Added “**9. Development will implement an Eviction Prevention Plan”**
* Added “**10. Low Barrier Tenant Screening**”

*FINAL UPDATES - April 22, 2024*

* **Submission Checklist (pg. 3)**
  + **5.1J. Evidence of Compliance**
    - Added “any loan defaults”
  + Added **6.2.I. Community Revitalization Plan**
  + Added **6.5.E(3) Onsite Daycare/Adult Day**
* **Threshold (pg. 16)** 
  + **21. Developer acknowledges…**
    - Changed to “Schedule D”
      * Only for noncompetitive bonds
    - Use “Schedule D1” for competitive bonds/state tax credits
    - Not relevant for 9%
* **HOME & Dev. FUND (1)**
  + Updated year (**Row 1**) to **2024**
  + Updated eligible organizations (**Row 3**)
  + Updated maximum requests (**Row 69**)

*May 1, 2024 - 4% (Noncompetitive) Form A Changes*

* Removed **pgs. 40 & 41**
  + Updated **pgs. 37-39** to reflect changes suggested by legal counsel to cover bond financing
* **Development Info (pg. 9)**
  + Updated Geographic Location box to synchronize with Underwriting Tabs

*May 1, 2024 - 4% Form A Changes*

* **Threshold (pg. 16)**
  + 21. Text changed to: “21. Developer Acknowledges that Developer will comply with the Closing Requirements, Deadlines, and Fees of Schedule D (Noncompetitive 4% RHTC) or Schedule D1 (4% RHTC with State Tax Credits).”

*May 1, 2024 - 9% Form A Changes*

* **Development Info (pg. 9)**
  + Added all funding set-asides
* **Threshold (pg. 16)**
  + Removed: “21. Developer Acknowledges that Developer will comply with the Closing Requirements, Deadlines, and Fees of Schedule D (Noncompetitive 4% RHTC) or Schedule D1 (4% RHTC with State Tax Credits).”
* **Acknowledgement & Signature (pg. 37-39)**
  + Reverted language to that of 2023-2024 application (removed language about bonds added in 4% application)