

REQUEST FOR APPLICATIONS 2014-104

**RFA 2014-104 FOR THE PRESERVATION OF EXISTING AFFORDABLE
HOUSING DEVELOPMENTS**

Issued By:

FLORIDA HOUSING FINANCE CORPORATION

Issued: February 7, 2014

Due: March 7, 2014

**SECTION ONE
INTRODUCTION**

This Request for Applications (RFA) is open to Applicants proposing the Preservation of existing affordable housing developments.

Under this RFA, the Corporation expects to have up to an estimated \$5,369,334 of Housing Credits available for award to proposed Preservation Developments. The Corporation is soliciting applications from qualified Applicants that commit to preserve existing affordable housing developments in accordance with the terms and conditions of this RFA, inclusive of Exhibits A, B, and C, applicable laws, rules and regulations, and the Corporation’s generally applicable construction and financial standards.

**SECTION TWO
DEFINITIONS**

Unless otherwise defined below, capitalized terms within this RFA shall have the meaning as set forth in Rule Chapters 67-48 and 67-60, F.A.C., or in applicable federal regulations.

**SECTION THREE
PROCEDURES AND PROVISIONS**

A. A complete Application consists of Exhibit A of RFA 2014-104 and all applicable attachments, as outlined in Section Four of the RFA. Exhibit A is available online at www.floridahousing.org . All Applicants must complete the online Exhibit A by **11:00 a.m., Eastern Time**, on March 7, 2014 (Application Deadline). The Corporation must receive (i) the completed online Exhibit A electronically submitted by the Applicant to the Corporation by clicking the “Submit” button and (ii) a sealed package(s) containing four (4) printed copies of the complete Application (consisting of the submitted online Exhibit A and all applicable attachments), housed in separate 3-ring binders with numbered divider tabs for each attachment, all by the Application Deadline. One (1) of the four (4) printed copies of the complete Application must be labeled “Original Hard Copy”, reflect an original signature (blue ink preferred) at Item 9 of Exhibit A, Applicant Certification and Acknowledgement, and include the required non-refundable \$3,000 Application fee payable to Florida Housing Finance Corporation (check or money order only). The Applicant should label the outside of each shipping box with the applicable RFA number. The Corporation will not consider faxed or e-mailed Applications. After 11:00 a.m., Eastern Time, on the Application Deadline, each Application, for which hard copies are received by the Application Deadline, will be assigned an Application number. In addition, such Applications will be assigned a lottery number by having the Corporation’s internal auditors run the total number of Applications received through a random number generator program. The printed copies of the complete Application must be addressed to:

Ken Reecy
Director of Multifamily Programs
Florida Housing Finance Corporation
227 N. Bronough Street, Suite 5000
Tallahassee, FL 32301

If any of the hard copies of Exhibit A are not identical to the online submission of Exhibit A, the online Exhibit A will be utilized for scoring purposes.

Applicants should review subsection 67-48.023(1), F.A.C., to determine eligibility to apply for the Housing Credits offered in this RFA.

Pursuant to subsection 67-60.004(2), F.A.C., an Applicant may request in writing to withdraw its Application at any time prior to a vote by the Corporation's Board. For funding selection purposes for this RFA, the Corporation shall disregard any Application withdrawal request that is submitted between 5:00 p.m., Eastern Time, the last business day before the date the Committee meets to make its recommendations to the Board and the Board's vote on the Committee's recommendations, and such Application shall be included in the funding selection process as if no withdrawal request had been submitted.

B. This RFA does not commit the Corporation to award any funding to any Applicant or to pay any costs incurred in the preparation or delivery of an Application.

C. Florida Housing reserves the right to:

1. Waive Minor Irregularities; and
2. Accept or reject any or all Applications received as a result of this RFA.

D. Any Interested Party may submit any inquiry regarding this RFA in writing to the Director of Multifamily Programs via e-mail at RFA_2014-104_Questions@floridahousing.org. All inquiries are due by 5:00 p.m., Eastern Time, on February 17, 2014. Phone calls or written inquiries other than at the above e-mail address will not be accepted. The Corporation expects to respond to all inquiries by 5:00 p.m., Eastern Time, on February 21, 2014 and will post a copy of all inquiries received, and their answers, on the Corporation's Website at:

<http://www.floridahousing.org/Developers/MultiFamilyPrograms/Competitive/2014-104/>. The Corporation will also send a copy of those inquiries and answers in writing to any interested party that requests a copy. The Corporation will determine the method of sending its answers, which may include regular United States mail, overnight delivery, fax, e-mail, or any combination of the above. No other means of communication, whether oral or written, shall be construed as an official response or statement from the Corporation.

E. Any person who wishes to protest the specifications of this RFA must file a protest in compliance with Section 120.57(3), Fla. Stat., and Rule Chapter 28-110, F.A.C. Failure to file a protest within the time prescribed in Section 120.57(3), Fla. Stat., shall constitute a waiver of proceedings under Chapter 120, Fla. Stat.

F. By submitting this Application, each Applicant agrees to the terms and conditions outlined in the RFA. By inclusion and execution of Exhibit A of the RFA, along with all applicable attachments thereto, including the Surveyor Certification form set out in Exhibit B of the RFA, each Applicant certifies that:

1. Public Records. Any material submitted in response to this RFA is a public record pursuant to Chapter 119, Fla. Stat. Per Section 119.071(1)(b)2., the sealed Applications received by the Corporation are exempt from disclosure until such time as the Board provides notice of an intended decision or until 30 Calendar Days after the opening of the sealed Applications, whichever is earlier.

2. Noninterference. At no time during the review and evaluation process, commencing with the Application Deadline and continuing until the Board renders a final decision on the RFA, may Applicants or their representatives contact Board members or Corporation staff concerning their own or any other Applicant's Application. If an Applicant or its representative does contact a Board or staff member in violation of this section, the Board shall, upon a determination that such contact was made in an attempt to influence the selection process, disqualify the Application.

3. Requirements. Proposed Developments funded with Housing Credits will be subject to the requirements of the RFA, the Application requirements outlined in Rule Chapter 67-60, F.A.C., the credit underwriting and HC Program requirements outlined in Rule Chapter 67-48, F.A.C., and the Compliance requirements of Rule Chapter 67-53, F.A.C.

G. The Corporation expects to select one (1) or more Applications to award the funding contemplated by this RFA. Any such Application(s) will be selected through the Corporation's review of each Application, considering the factors identified in this RFA.

SECTION FOUR INFORMATION TO BE PROVIDED IN APPLICATION

The Applicant must provide a completed and executed Application found in Exhibit A to RFA 2014-104, along with all applicable attachments thereto, including the Surveyor Certification form (Form 01-14) set out in Exhibit B of the RFA, which includes the following information (also accessible by clicking [here](#)). For purposes of this requirement, the Applicant may utilize the 2013 Surveyor Certification form, provided the information entered on the form complies with the requirements of this RFA. Any option selected on the 2013 Surveyor Certification form that is not a part of this RFA will not be considered.

A. Exhibit A Items:

1. Demographic Commitment:

The Applicant must select one of the following Demographic Commitments which are defined in Section 67-48.002, F.A.C.:

- a. Family
- b. Elderly – Indicate whether the proposed Development will be an Elderly Assisted Living Facility (ALF) or an Elderly non-ALF.
- c. Person with a Disability – The proposed Development must also meet the resident eligibility for occupancy requirements of HUD Section 811, which are outlined in Section 1-5 at <http://www.hud.gov/offices/adm/hudclips/handbooks/hsg/4571.2/45712c1HSGH.pdf> .

2. Applicant Information:

- a. The Applicant must state the name of the Applicant.
- b. The Applicant must be a legally formed entity [i.e., limited partnership, limited liability company, etc.] qualified to do business in the state of Florida as of the Application Deadline. The Applicant must include, as **Attachment 1** to Exhibit A, evidence from the Florida Department of State, Division of Corporations, that the Applicant satisfies the foregoing requirements; such evidence may be in the form of a certificate of status or other reasonably reliable information or documentation issued, published or made available by the Florida Department of State, Division of Corporations.
- c. The Applicant must indicate whether it is applying as a Non-Profit entity. During the credit underwriting process, if the Applicant answers “Yes” to question 2.c. of Exhibit A, the Applicant will be required to demonstrate that it qualified as a Non-Profit as of the Application Deadline by providing the documentation outlined in Item 9.b.(2)(g) of Exhibit A and that it meets the requirements outlined in Item 9.c.(4) of Exhibit A.
- d. Principals for the Applicant and for each Developer:

All Applicants must provide a list, as **Attachment 2** to Exhibit A, identifying the Principals for the Applicant and for each Developer, as follows:

- (1) For a Limited Partnership, provide a list identifying the following: (i) the Principals of the Applicant as of the Application Deadline and (ii) the Principals for each Developer as of the Application Deadline. This list must include warrant holders and/or option holders of the proposed Development.
- (2) For a Limited Liability Company, provide a list identifying the following: (i) the Principals of the Applicant as of the Application Deadline and (ii) the Principals for each Developer as of the Application Deadline. This list must include warrant holders and/or option holders of the proposed Development.
- (3) For a Corporation and all other entities, provide a list identifying the following: (i) the Principals of the Applicant as of the Application Deadline and (ii) the Principals for each Developer as of the Application Deadline.

This eligibility requirement may be met by providing a copy of the list of Principals that was reviewed and approved by the Corporation during the advance-review process.

To assist the Applicant in compiling the listing, the Corporation has included additional information at Item 3 of Exhibit C.

e. Contact Person.

Enter the requested information for the Contact Person. At a minimum, the Applicant must provide the name and e-mail address of the Contact Person.

3. Developer Information:

- a. The Applicant must state the name of each Developer, including all co-Developers.
- b. Each Developer entity identified at question 3.a. of Exhibit A (that is not a natural person) must be a legally formed entity qualified to do business in the state of Florida as of the Application Deadline. For each stated Developer entity that is not a natural person, provide, as **Attachment 3** to Exhibit A, evidence from the Florida Department of State, Division of Corporations, that the Developer satisfies the foregoing requirements; such evidence may be in the form of a certificate of status or other reasonably reliable information or documentation issued, published or made available by the Florida Department of State, Division of Corporations.
- c. Experienced Developer(s)

At least one Principal of the Developer entity, or if more than one Developer entity, at least one Principal of at least one of the Developer entities, must meet the General Developer Experience requirements in (1) and (2) below.

(1) General Developer Experience:

A Principal of each experienced Developer entity must have, since January 1, 1991, completed at least three (3) affordable rental housing developments, at least one (1) of which was a Housing Credit development completed since January 1, 2001. At least one (1) of the three (3) completed developments must consist of a total number of units no less than 50 percent of the total number of units in the proposed Development. For purposes of this provision, completed for each of the three (3) developments means (i) that the temporary or final certificate of occupancy has been issued for at least one (1) unit in one of the residential apartment buildings within the development, or (ii) that at least one (1) IRS Form 8609 has been issued for one of the residential apartment

buildings within the development. As used in this section, an affordable rental housing development, including a Housing Credit development that contains multiple buildings, is a single development regardless of the number of buildings within the development for which an IRS Form 8609 has been issued.

If the experience of a Principal for a Developer entity listed in this Application was acquired from a previous affordable housing Developer entity, the Principal must have also been a Principal of that previous Developer entity.

(2) Prior General Development Experience Chart:

The Applicant must provide, as **Attachment 4** to Exhibit A, a prior experience chart for each Principal intending to meet the minimum general development experience reflecting the required information for the three (3) completed affordable rental housing developments, one (1) of which must be a Housing Credit development.

Each prior experience chart must include the following information:

Prior General Development Experience Chart				
Name of Principal with the Required Experience: _____				
Name of Developer Entity (for the proposed Development) for which the above Party is a Principal: _____				
Name of Development	Location (City & State)	Affordable Housing Program that Provided Financing (e.g., Housing Credits, Tax-Exempt Bonds, HOME, SAIL, etc.)	Total Number of Units	Year Completed

4. General Development Information:

Unless stated otherwise, all information requested in the RFA pertains to the proposed Development.

a. The Applicant must state the name of the proposed Development.

b. Location of Development site:

(1) The Applicant must indicate the county in which the proposed Development will be located.

Large, Medium and Small County Categories

Large	Medium	Small
Broward	Alachua	Baker
Duval	Bay	Bradford
Hillsborough	Brevard	Calhoun
Miami-Dade	Charlotte	Columbia
Orange	Citrus	De Soto
Palm Beach	Clay	Dixie
Pinellas	Collier	Flagler
	Escambia	Franklin
	Hernando	Gadsden
	Indian River	Gilchrist
	Lake	Glades
	Lee	Gulf
	Leon	Hamilton
		Hardee
		Hendry
		Highlands
		Holmes
		Jackson
		Jefferson
		Lafayette
		Levy
		Liberty
		Madison
		Monroe
		Nassau
		Okeechobee
		Putnam
		Suwannee
		Taylor
		Union
		Wakulla
		Walton
		Washington

(2) The Applicant must provide the Address of the Development Site.

Indicate (i) the address number, street name, and name of city, and/or (ii) the street name, closest designated intersection, and either name of city or unincorporated area of county.

If the proposed Development consists of Scattered Sites, during the credit underwriting process the Applicant must demonstrate that the Development meets the requirements of this RFA and Section 42 of the IRC. However, if the proposed Development consists of Scattered Sites, site control must be demonstrated in the Application for all of the Scattered Sites, as outlined in Section Four A.7. of the RFA.

c. Preservation Development Category / Rental Assistance (RA) Level / Concrete Construction:

(1) Preservation Development Category:

To verify that the proposed Development is eligible to be considered for funding under this RFA, the Applicant must meet the following criteria and provide the required information:

- (a) At question 4.c.(1) of Exhibit A, the Applicant must indicate the applicable Preservation Development Category that best describes the proposed Development:
 - Preservation (where less than 50% of the units are new construction); or
 - Acquisition and Preservation (acquisition and less than 50% of the units are new construction)
- (b) The proposed Development must meet the definition of Preservation stated in Section 67-48.002, F.A.C.;
- (c) The proposed Development must also meet the definition of Rehabilitation stated in Sections 67-48.002 and 67-48.0075, F.A.C.;
- (d) The existing development must be at least 75 percent occupied as of the Application Deadline. To meet this qualification, the Applicant's answer to question 4.c.(2) of Exhibit A must be "Yes".
- (e) The Applicant must provide, as **Attachment 5** to Exhibit A, a letter* from HUD or RD, dated within 12 months of the Application Deadline, which includes the following information:
 - (i) Name of the Development**;
 - (ii) Address of the Development;
 - (iii) Year built;
 - (iv) Total number of units that **currently** receive PBRA and/or ACC;
 - (v) Total number of units that **will** receive PBRA and/or ACC if the proposed Development is funded;
 - (vi) All HUD or RD financing programs **currently** associated with the existing development;
 - (vii) The type of HUD or RD rental assistance that **will be** associated with the proposed Development;
 - (viii) All HUD or RD financing programs that **will be** associated with the proposed Development; and
 - (ix) Confirmation that the Development has not received financing from HUD or RD after 1994 where the rehabilitation budget was at least \$10,000 per unit in any year.

*This information will also be used to determine the Application's Rental Assistance (RA) Level Classification, as outlined in (2) below.

**For purposes of this provision, the Name of the Development may be the name at the time of the PBRA and/or ACC award.

- (f) At question 4.c.(3) of Exhibit A, the Applicant must indicate the estimated qualified basis in Rehabilitation expenses per set aside unit within one 24-month period for the building(s) being rehabilitated. This amount must be at least \$20,000 per set-aside unit as outlined in Section 67-48.0075, F.A.C.

All Developments that are tentatively funded in this RFA will be required to provide to the Credit Underwriter a plan for relocation of existing tenants.

If the Application does not meet all of the criteria and provide all of the required information outlined above, the Application will not be eligible to be considered for funding in this RFA.

If the proposed Development consists of acquisition and Preservation, with or without new construction (where the applicable new construction is for the building of units which will total less than 50 percent of the proposed Development's total unit count), but the Applicant is not requesting Corporation funding related to the acquisition, the Applicant should select Preservation as the Development Category. However, the acquisition costs and sources must still be reflected on the Development Cost pro forma.

(2) Rental Assistance (RA) Level Classification:

Part of the criteria for a proposed Development that qualifies as a Limited Development Area (LDA) Development to be eligible to be considered for funding is based on its RA Level, as outlined at Section Four A.6.c. below.

The total number of units that will receive rental assistance (i.e., PBRA and/or ACC), as stated in the Preservation Development Category qualification letter (outlined in (1)(e)(v) above), will be considered to be the proposed Development's RA units and will be the basis of the Applicant's RA Level Classification. The Corporation will divide the RA units by the total units stated by the Applicant at question 4.e. of Exhibit A, resulting in a Percentage of Total Units that are RA units. Using the Rental Assistance Level Classification Chart below, the Corporation will determine the RA Level associated with both the Percentage of Total Units and the RA units. The best rating of these two (2) levels will be assigned as the Application's RA Level Classification.

Rental Assistance Level Classification Chart			
Rental Assistance Level	Percentage of Total Units with Rental Assistance		Number of RA Units
Level 1	All units receive rental assistance (with the exception of up to 2 units)	or	At least 100 units and greater than 50% of the total units
Level 2	Greater than 90.00%	or	Greater than 90 units but less than 100 units and greater than 50% of the total units
Level 3	Greater than 75.00%, equal to or less than 90.00%	or	Greater than 75 units but less than 90 units and greater than 50% of the total units
Level 4	Greater than 50.00%, equal to or less than 75.00%		N/A
Level 5	Greater than 10.00%, equal to or less than 50.00%		N/A
Level 6*	10.00% or less of the total units receive rental assistance		N/A

*Applications will be classified RA Level 6 if 10.00% or less of the total units receive rental assistance or if the Applicant fails to meet the criteria outlined above.

(3) Concrete Construction:

For purposes of this RFA, in order for a proposed Development to be considered to be concrete construction the proposed Development must meet the following specifications: (i) new construction buildings must have the following poured concrete, concrete masonry or load-bearing masonry elements, as verified by a capital needs assessment: all exterior walls and structural elements, not to include roofs; and structural elements at and under the ground floor, as well as the ground floor itself; (ii) existing buildings proposed for rehabilitation must have, as of Application Deadline, the elements outlined in (i) above and the rehabilitation work must include these elements; or (iii) new construction buildings with the Mid-Rise Development Type (4, 5 or 6 story, as selected by the Applicant at question 4.d. of Exhibit A) that utilize a concrete podium structure under the rental living units. These qualifying criteria specifically exclude face brick or brick veneer from qualifying for this preference without the benefit of the qualifying material in (i) being utilized in the manner prescribed in (i).

Indicate whether the proposed Development meets the requirements to be considered to be concrete construction. For purposes of this RFA, the Corporation will only consider an Application to be concrete construction if the answer to question 4.c.(4) of Exhibit A of the RFA is “Yes”.

d. The Applicant must select the one Development Type listed below that best describes the proposed Development*:

*For mixed-type Developments, indicate the type that will comprise 50 percent or more of the units in the Development.

- Garden Apartments
- Townhouses
- Duplexes
- Quadraplexes
- Mid-Rise with Elevator (a building comprised of 4 stories)
- Mid-Rise with Elevator (a building comprised of 5 or 6 stories)
- High Rise (a building comprised of 7 or more stories)

e. Number of Units in Proposed Development:

(1) The Applicant must state the total number of units.

Note: All proposed Developments must consist of a minimum of 30 total units. Proposed Developments with a Demographic Commitment of Family, Elderly non-ALF, and Person with a Disability (at question 1 of Exhibit A) cannot exceed a maximum of 250 total units. Proposed Developments with a Demographic Commitment of Elderly ALF (at question 1 of Exhibit A) cannot exceed a maximum of 100 total units.

(2) The Applicant must indicate whether the proposed Development consists of (a) 100% rehabilitation units or (b) a combination of new construction units and rehabilitation units and state the quantity of each type.

5. Proximity:

In order for an Application to be considered for any proximity points, the Applicant must provide an acceptable Surveyor Certification form (Form Rev. 01-14), as **Attachment 6** to Exhibit A, reflecting the information outlined below. (The Surveyor Certification form (Form Rev. 01-14) is provided in Exhibit B of this RFA or can be accessed by clicking [here](#).) For purposes of this requirement, the Applicant may utilize the 2013 Surveyor Certification form, provided the information entered on the form complies with the requirements of this RFA. Any option selected on the 2013 Surveyor Certification form that is not a part of this RFA will not be considered.

- A Development Location Point; and
- Services information for the Bus or Rail Transit Service (if Private Transportation is not selected at question 5.b. of Exhibit A) and Community Services for which the Applicant is seeking points.

Item 5.b. below outlines the minimum point requirements to be eligible to be considered for funding and the minimum point requirements to be eligible for the Proximity Funding Preference. The Transit and Community Services are outlined in Item 5.c. below. The Mandatory Distance Requirement is outlined in Item 5.d. below.

a. Development Location Point:

The Applicant must identify a Development Location Point on the proposed Development site and provide the latitude and longitude coordinates determined in degrees, minutes and seconds, with the degrees and minutes stated as whole numbers and the seconds truncated after one decimal place. If the degrees and minutes are not stated as whole numbers and the seconds are not truncated after one decimal place, the latitude and longitude coordinates will not be considered.

The latitude and longitude coordinates for the Development Location Point stated on the Surveyor Certification form will be plotted by the Corporation, using Street Atlas USA 2013, published by DeLorme, for the following purposes:

- (1) To verify that the stated coordinates are located within the county identified by the Applicant at question 4.b.(1) of Exhibit A;
- (2) To determine whether the proposed Development is at least the mandatory distance away from the closest Development coordinates identified on the 2013 FHFC Development Proximity List (the “Mandatory Distance Requirement”), as outlined in Section Four A.5.d. of the RFA; and
- (3) To determine whether the proposed Development qualifies as an LDA Development if it is located within a county where only a specific area(s) of the county has been designated as an LDA area, as outlined in Section Four A.6.c. of the RFA.

b. PHA Proximity Point Boost / Minimum Proximity Point Requirements:

Each Application’s proximity points will be based on the distance between the Development Location Point and the Bus or Rail Transit Service (if Private Transportation is not selected at question 5.b. of Exhibit A) and the Community Services stated on the Surveyor Certification form.

(1) PHA Proximity Point Boost:

An Application that involves a site(s) with an existing Declaration of Trust between a Public Housing Authority (PHA) and HUD will qualify to receive a 3 point boost toward its proximity score if the Applicant provides a letter from the PHA dated within 12 months of the Application Deadline certifying that the site(s) where all of the units in the proposed Development will be located has an existing Declaration of Trust between the PHA and HUD. The letter must be signed by the appropriate person authorized to make such a certification and must be provided as **Attachment 6** to Exhibit A.

(2) Minimum Proximity Point Requirements:

The following chart sets out:

- (a) The required minimum Transit Service Score that must be achieved by all Large County Developments (those eligible for the PHA Proximity Boost outlined in (1) above and those not eligible for the boost) to be eligible to be considered for funding;
- (b) The required minimum Total Proximity Score that must be achieved by all Applications to be eligible to be considered for funding; and
- (c) The required minimum Total Proximity Score that must be achieved in order for an Application to be eligible for the Proximity Funding Preference.

Location of Proposed Development	To be Eligible to be Considered for Funding*			To be Eligible for the Proximity Funding Preference**
	Required Minimum Transit Service Score if Eligible for PHA Proximity Boost	Required Minimum Transit Service Score if NOT Eligible for PHA Proximity Boost	Required Minimum Total Proximity Score	Required Minimum Total Proximity Score
Broward County Miami-Dade County	1.5	2	11.75	13.75
Duval County Hillsborough County Orange County Palm Beach County Pinellas County	1.5	2	10.25	12.25
Medium County***	N/A	N/A	7	9
Small County***	N/A	N/A	4	6

*Funding eligibility requirements are further described in Section Four B.1. of the RFA.
 **Proximity Funding Preference is further described in Section Four B.2.f. of the RFA.
 ***Medium and Small Counties are described in Section Four A.4.b. of the RFA.

c. Proximity to Transit and Community Services:

(1) Transit Services

Applicants may select one (1) of the following five (5) Transit Services on which to base the Applicant's Transit Score. If the Applicant selects Private Transportation at question 5.b. of Exhibit A and also provides information on the Surveyor Certification form for a Bus or Rail Transit Service, or if the Applicant provides information on the Surveyor Certification form for more than one (1) Bus or Rail Transit Service or more than one (1) of any type of Bus or Rail Transit Service, the Applicant will not receive any proximity points for the Transit Service Score. (For example, Applicants are limited to selecting one Public Bus Transfer Stop, even though there may be another Public Bus Transfer Stop nearby. If the Applicant provides information for two Public Bus Transfer Stops, the Applicant will not receive any proximity points for either of the Public Bus Transfer Stops.)

The eligible Transit Services are defined below:

(a) Private Transportation (2 Points)

This service may be selected only if the Applicant selected the Elderly or Person with a Disability Demographic Commitment at question 1 of Exhibit A. For purposes of proximity points, the Applicant or its Management Company must provide, at no cost to the residents, transportation to non-emergency medical appointments such as therapy, chemotherapy, dentistry, hearing, dialysis, prescription pick-ups, testing and x-rays, as well as shopping, public service facilities, and/or educational or social activities. The vehicle used for the residents' transportation must accommodate at least six (6) adult passengers, including the vehicle's driver and at least one wheelchair position. Access to a program such as "Dial-A-Ride" will not be acceptable for purposes of this service.

or

(b) Public Bus Stop (Maximum 2 Points)

This service may be selected by all Applicants, regardless of the Demographic Commitment selected at question 1 of Exhibit A. For purposes of proximity points, a Public Bus Stop means a fixed location at which passengers may access one or two routes of public transportation via buses. The Public Bus Stop must service at least one bus route with scheduled stops at least hourly during the times of 7am to 9am and also during the times of 4pm to 6pm Monday through Friday, excluding holidays, on a year-round basis. Bus routes must be established or approved by a Local Government department that manages public transportation. Buses that travel between states will not be considered.

or

(c) Public Bus Transfer Stop (Maximum 6 Points)

This service may be selected by all Applicants, regardless of the Demographic Commitment selected at question 1 of Exhibit A. For purposes of proximity points, a Public Bus Transfer Stop means a fixed location at which passengers may access at least three routes of public transportation via buses. Each qualifying route must have a scheduled stop at the Public Bus Transfer Stop at least hourly during the times of 7am to 9am and also during the times of 4pm to 6pm Monday through Friday, excluding holidays, on a year-round basis. This would include both bus stations (i.e.,

hubs) and bus stops with multiple routes. Bus routes must be established or approved by a Local Government department that manages public transportation. Buses that travel between states will not be considered.

or

(d) Public Bus Rapid Transit Stop (Maximum 6 Points)

This service may be selected by all Applicants, regardless of the Demographic Commitment selected at question 1 of Exhibit A. For purposes of proximity points, a Public Bus Rapid Transit Stop means a fixed location at which passengers may access public transportation via bus. The Public Bus Rapid Transit Stop must service at least one bus that travels at some point during the route in either a lane or corridor that is exclusively used by buses and the Public Bus Rapid Transit Stop must service at least one route that has scheduled stops at the Public Bus Rapid Transit Stop at least every 20 minutes during the times of 7am to 9am and also during the times of 4pm to 6pm Monday through Friday, excluding holidays, on a year-round basis.

or

(e) Public Rail Station (Maximum 6 Points)

This service may be selected by all Applicants, regardless of the Demographic Commitment selected at question 1 of Exhibit A. For purposes of proximity points, a Public Rail Station means a fixed location at which passengers may access the scheduled public rail transportation at a MetroRail Station (located in Miami-Dade County), a TriRail Station (located in Miami-Dade County, Broward County or Palm Beach County), or a SunRail Station (located in Orange County, Seminole County or Volusia County) on a year-round basis.

(2) Community Services (Maximum 4 Points for each service)

Applicants are limited to one (1) of each type of Community Service. If the Applicant provides information for more than one (1) of any type of Community Service, that Community Service will not be scored and the Applicant will not receive any proximity points for that Community Service. (For example, Applicants are limited to selecting one Grocery Store, even though there may be another Grocery Store nearby. If the Applicant provides information for two Grocery Stores, the Applicant will not receive any proximity points for either of the Grocery Stores.)

The eligible Community Services are defined below. These services may be selected by all Applicants.

- (a) Grocery Store - For purposes of proximity points, a Grocery Store means a retail food store consisting of 4,500 square feet or more of contiguous air-conditioned space available to the public, that has been issued a food permit, current and in force as of the dates outlined in the In-Service Time Frames chart in Item 5.c.(3) below, issued by the Florida Department of Agriculture and Consumer Service (FDACS) which designates the store as a Grocery Store or Supermarket within the meaning of those terms for purposes of FDACS-issued food permits.
- (b) Medical Facility - For purposes of proximity points, a Medical Facility means a medically licensed facility that (i) employs or has under contractual obligation at

least one physician licensed under Chapter 458 or 459, F.S. available to treat patients by walk-in or by appointment; and (ii) provides general medical treatment to any physically sick or injured person. Facilities that specialize in treating specific classes of medical conditions or specific classes of patients, including emergency rooms affiliated with specialty or Class II hospitals and clinics affiliated with specialty or Class II hospitals, will not be accepted.

- (c) Pharmacy - For purposes of proximity points, a Pharmacy means a community pharmacy operating under a valid permit issued pursuant to s. 465.018, F.S., and open to the general public at least five (5) days per week without the requirement of a membership fee.

(3) In-Service Time Frames:

In addition to meeting the definitions outlined above, in order to be considered for proximity points in this RFA, the Bus and Rail Transit Services and the Community Services must be in existence and available for use by the general public as of the following time frames:

Service	Minimum Amount of time that the service must be in existence and available for use by the general public
Bus, MetroRail, and TriRail Transit Services	As of the Application Deadline
SunRail Stations (all acceptable coordinates outlined on the Coordinates Location Chart in (4) below and on the Surveyor Certification form)	No time frame required
Medical Facility	As of the Application Deadline
Grocery Store, if it is one of the following and meets the definition of Grocery Store at (2)(a) above: Albertson’s, Bravo Supermarkets, BJ’s Wholesale Club, Costco Wholesale, Food Lion, Fresh Market, Harvey’s, Milam’s Markets, Piggly Wiggly, Presidente, Publix, Sam’s Club, Sav – A – Lot, Sedano’s, SuperTarget, Sweet Bay, Walmart Neighborhood Market, Walmart Supercenter, Whole Foods, Winn-Dixie	As of the Application Deadline
Grocery Store, if it meets the definition of Grocery Store, but is not one of the stores identified above	As of the Application Deadline and has been open and available for use by the general public since a date that is 6 months prior to the Application Deadline
Pharmacy, if it is one of the following and meets the definition of Pharmacy at (2)(c) above: Albertson’s, CVS, Harvey’s, Kmart, Navarro’s, Piggly Wiggly, Publix, Sav – A – Lot, Target, Walgreens, Wal-Mart, Winn-Dixie	As of the Application Deadline
Pharmacy, if it meets the definition of Pharmacy, but is not one of the stores identified above	As of the Application Deadline and has been open and available for use by the general public since a date that is 6 months prior to the Application Deadline

(4) Required Information for the Surveyor Certification Form:

The latitude and longitude coordinates for all Bus and Rail Transit Services and Community Services must represent a point as outlined below. The coordinates for each service must be stated in degrees, minutes and seconds, with the degrees and minutes stated as whole numbers and the seconds truncated after one decimal place. If the degrees and minutes are not stated as whole numbers and the seconds are not truncated after one decimal place, the Applicant will not be eligible for points for that service.

The following chart describes the location where the latitude and longitude coordinates must be obtained:

Coordinates Location Chart

Development Location Point or Service	Location of latitude and longitude coordinates																										
Development Location Point	Coordinates must be a single point selected by the Applicant on the proposed Development site that is located within 100 feet of a residential building existing or to be constructed as part of the proposed Development. For a Development which consists of Scattered Sites, this means a single point on the site with the most units that is located within 100 feet of a residential building existing or to be constructed as part of the proposed Development.																										
Community Services	Coordinates must represent a point that is on the doorway threshold of an exterior entrance that provides direct public access to the building where the service is located.																										
Bus and Rail Transit Services	<p>For MetroRail Station, TriRail Station, Public Bus Stop, Public Bus Rapid Transit Stop, and Public Bus Transfer Stop, coordinates must represent the location where passengers may embark and disembark the train or bus.</p> <p>For SunRail Station, coordinates must represent either the location where passengers may embark and disembark the train or the coordinates listed below:</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">SunRail Station</th> <th style="text-align: left;">Latitude/Longitude Coordinates</th> </tr> </thead> <tbody> <tr> <td>Altamonte Springs Station</td> <td>N 28 39 50.1, W 81 21 23.4</td> </tr> <tr> <td>Church Street Station</td> <td>N 28 32 20.3, W 81 22 50.6</td> </tr> <tr> <td>DeBary Station</td> <td>N 28 51 20.3, W 81 19 24.1</td> </tr> <tr> <td>Florida Hospital Station</td> <td>N 28 34 21.8, W 81 22 17.4</td> </tr> <tr> <td>Lake Mary Station</td> <td>N28 45 31.8, W 81 19 04.3</td> </tr> <tr> <td>Longwood Station</td> <td>N 28 42 04.1, W 81 20 43.4</td> </tr> <tr> <td>LYNX Central Station</td> <td>N 28 32 52.2, W 81 22 51.0</td> </tr> <tr> <td>Maitland Station</td> <td>N 28 38 03.7, W 81 21 44.7</td> </tr> <tr> <td>Orlando Amtrak/ORMC Station</td> <td>N 28 31 39.5, W 81 22 55.6</td> </tr> <tr> <td>Sand Lake Road Station</td> <td>N 28 27 11.3, W 81 22 1.0</td> </tr> <tr> <td>Sanford/SR46 Station</td> <td>N 28 48 49.8, W 81 17 56.9</td> </tr> <tr> <td>Winter Park/Park Ave Station</td> <td>N 28 35 51.5, W 81 21 6.0</td> </tr> </tbody> </table>	SunRail Station	Latitude/Longitude Coordinates	Altamonte Springs Station	N 28 39 50.1, W 81 21 23.4	Church Street Station	N 28 32 20.3, W 81 22 50.6	DeBary Station	N 28 51 20.3, W 81 19 24.1	Florida Hospital Station	N 28 34 21.8, W 81 22 17.4	Lake Mary Station	N28 45 31.8, W 81 19 04.3	Longwood Station	N 28 42 04.1, W 81 20 43.4	LYNX Central Station	N 28 32 52.2, W 81 22 51.0	Maitland Station	N 28 38 03.7, W 81 21 44.7	Orlando Amtrak/ORMC Station	N 28 31 39.5, W 81 22 55.6	Sand Lake Road Station	N 28 27 11.3, W 81 22 1.0	Sanford/SR46 Station	N 28 48 49.8, W 81 17 56.9	Winter Park/Park Ave Station	N 28 35 51.5, W 81 21 6.0
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If there is no exterior public entrance to the Community Service, then a point should be used that is at the exterior entrance doorway threshold that is the closest walking distance to the doorway threshold of the interior public entrance to the service. For example, for a Pharmacy located within an enclosed shopping mall structure that does not have a direct public exterior entrance, the latitude and longitude coordinates at the doorway threshold of the exterior public entrance to the enclosed shopping mall that provide the shortest walking distance to the doorway threshold of the interior entrance to the Pharmacy would be used.

Applicants may use the same latitude and longitude coordinates for the Grocery Store, Medical Facility and/or Pharmacy if the Grocery Store, Medical Facility and/or Pharmacy is housed at the same location.

(5) Scoring Proximity to Services (Transit and Community):

(a) Private Transportation

Applicants that selected the Elderly or Person with a Disability Demographic Commitment at question 1 of Exhibit A and wish to provide Private Transportation as the Transit Service must select “Yes” at question 5.b. of Exhibit A to be eligible to receive 2 points.

(b) Bus and Rail Transit Services and Community Services

The distances between the Development Location Point and each service, as certified by the Surveyor on the Surveyor Certification form, will be the basis for awarding proximity points. Failure to provide the distance for any Community Service will

result in zero points for that Community Service. Failure to provide the distance for any Bus or Rail Transit Service will result in zero points for that Transit Service.

(i) Transit Service Distance Scoring Charts:

Note: Section Four A.5.b.(2) above outlines the minimum Transit Service Score requirements.

Public Bus Stop	
Proximity of Proposed Development's Development Location Point to a Public Bus Stop stated on the Form	Number of Proximity Points Awarded for Eligible Service
if less than or equal to 0.20 miles	2.0
if greater than 0.20 and less than or equal to 0.30 miles	1.5
if greater than 0.30 and less than or equal to 0.40 miles	1.0
if greater than 0.40 and less than or equal to 0.50 miles	0.5
if greater than 0.50 miles	0.0

MetroRail Station, TriRail Station, SunRail Station, Public Bus Transfer Stop, or Public Bus Rapid Transit Stop	
Proximity of Proposed Development's Development Location Point to a Public Rail Station, a Public Bus Transfer Stop or a Public Bus Rapid Transit Stop stated on the Form	Number of Proximity Points Awarded for Eligible Service
if less than or equal to 0.25 miles	6.0
if greater than 0.25 and less than or equal to 0.50 miles	5.5
if greater than 0.50 and less than or equal to 0.75 miles	5.0
if greater than 0.75 and less than or equal to 1.00 miles	4.5
if greater than 1.00 and less than or equal to 1.25 miles	4.0
if greater than 1.25 and less than or equal to 1.50 miles	3.5
if greater than 1.50 and less than or equal to 1.75 miles	3.0
if greater than 1.75 and less than or equal to 2.00 miles	2.5
if greater than 2.00 miles	0.0

(ii) Community Services Scoring Chart:

Grocery Store, Medical Facility and Pharmacy	
Proximity of Proposed Development's Development Location Point to an eligible Grocery Store, Medical Facility and Pharmacy stated on the Form	Number of Proximity Points Awarded for Eligible Service
if less than or equal to 0.25 miles	4.0
if greater than 0.25 and less than or equal to 0.50 miles	3.5
if greater than 0.50 and less than or equal to 0.75 miles	3.0
if greater than 0.75 and less than or equal to 1.00 miles	2.5
if greater than 1.00 and less than or equal to 1.25 miles	2.0
if greater than 1.25 and less than or equal to 1.50 miles	1.5
if greater than 1.50 and less than or equal to 1.75 miles	1.0
if greater than 1.75 and less than or equal to 2.00 miles	0.5
If greater than 2.00 miles	0.0

d. Mandatory Distance Requirement:

To be eligible to be considered for funding, Applications must qualify for the Mandatory Distance Requirement. Applications may qualify automatically (as outlined in (1) below). Applications that are not eligible for the automatic qualification will only qualify if the distance between the Development Location Point and other properties identified on the 2013 FHFC Development Proximity List, effective 8-16-13, (the List) serving the same demographic group as the proposed Development meets the Mandatory Distance Requirement for the applicable county or county category, as outlined in (2) below. The List is available on the Corporation's Website under the Multifamily Programs link labeled Related References and Links (also accessible by clicking [here](#)). Applications that do not qualify for the Mandatory Distance Requirement under (1) or (2) below will not be eligible to be considered for funding.

(1) Applications Eligible for the automatic qualification for the Mandatory Distance Requirement:

Applications will automatically qualify for the Mandatory Distance Requirement by meeting the criteria outlined in question 5.c.(1) of Exhibit A. The Applicant should select question 5.c.(1) of Exhibit A.

(2) Applications Not Eligible for the automatic qualification for the Mandatory Distance Requirement:

The Applicant should select question 5.c.(2) of Exhibit A. Determination of whether the Application meets the qualifications of the Mandatory Distance Requirement for the applicable county or county category will be based on whether the Development Location Point meets the criteria for the required distance, as outlined below, of a Development on

the List serving the same demographic group. To make such determination, the Applicant, using Street Atlas USA 2013, published by DeLorme, should follow the steps outlined below. For purposes of this provision, same demographic refers to Family Demographic, Elderly non-ALF Demographic, Elderly ALF Demographic, and Person with a Disability Demographic.

- (a) Select the “Advanced” search button on the “Find” tab, to the right of the “Advanced” button select “Latitude/ Longitude” from the drop down menu under “Find:”, check the “MapTags” box, enter the latitude and longitude coordinates for the Development Location Point in the appropriate blanks to the right and then click the “Search” button. A “MapTag” with the entered coordinates will then appear in the appropriate location.
- (b) For each Development on the List that serves the same demographic group as the proposed Development which is in proximity to the proposed Development’s Development Location Point, repeat the steps stated above to display MapTags for the Development(s). For those Developments on the List that have more than one set of latitude and longitude coordinates, the Corporation will use the coordinates that represents the closest location to the proposed Development’s Development Location Point as the location of the Development from the List for the purposes of awarding proximity points.
- (c) Select the “Draw” tab. Under “Tools,” select the circle or, if there is no circle, click and hold the left mouse button and this will provide several shape options, one of which is a circle. To the right, use the thinnest line possible, select “None” as the fill color for the circle and choose a color such as black for the outline. Enter the latitude and longitude coordinates for the proposed Development’s Development Location Point in the space provided, and then enter, as appropriate, 0.5, 1.0 or 5.0 miles for the radius. Upon selecting the “Apply” button, the software will draw a circle, with the radius entered, around the Development Location Point.
- (d) If the tip of any of the MapTags entered for the Developments on the List are within the drawn circle or, when the map is zoomed in as far as possible, if the tip of any of the entered MapTags appears to the naked eye to be on the drawn line of the circle, the Applicant can conclude that the Development Location Point is within the distance entered for the radius of the circle of a Development from the List. The tip of a MapTag is the point of the MapTag that denotes the actual location of what the MapTag represents.
- (e) For purposes of the following, a proposed Development qualifies as an LDA Development if it meets the provisions described in Section Four A.6.c. of the RFA:
 - (i) Broward County and Miami-Dade County Applications will qualify for the Mandatory Distance Requirement by meeting the following:
 - If the distance of the proposed Development to Developments on the List is greater than 5.0 miles if the proposed Development qualifies as an LDA Development; or
 - If the distance of the proposed Development to Developments on the List is greater than 0.5 miles if the proposed Development does not qualify as an LDA Development.

(ii) Duval County, Hillsborough County, Orange County, Palm Beach County, and Pinellas County Applications will qualify for the Mandatory Distance Requirement by meeting the following:

- If the distance of the proposed Development to Developments on the List is greater than 5.0 miles if the proposed Development qualifies as an LDA Development; or
- If the distance of the proposed Development to Developments on the List which consist of 31 total units or more is greater than 2.0 miles if the proposed Development does not qualify as an LDA Development; or
- If the distance of the proposed Development to Developments on the List which consist of 30 total units or less is greater than 1.0 miles if the proposed Development does not qualify as an LDA Development.

If the location of the proposed Development is such that both the 2.0 miles criteria and the 1.0 miles criteria would apply, the more restrictive 1.0 miles criteria will be used to evaluate the Application.

(iii) Medium County Applications and Small County Applications will qualify for the Mandatory Distance Requirement by meeting the following:

- If the distance of the proposed Development to Developments on the List is greater than 5.0 miles if the proposed Development qualifies as an LDA Development; or
- If the distance of the proposed Development to Developments on the List which consist of 31 total units or more is greater than 2.5 miles if the proposed Development does not qualify as an LDA Development; or
- If the distance of the proposed Development to Developments on the List which consist of 30 total units or less is greater than 1.25 miles if the proposed Development does not qualify as an LDA Development.

If the location of the proposed Development is such that both the 2.5 miles criteria and the 1.25 miles criteria would apply, the more restrictive 1.25 miles criteria will be used to evaluate the Application.

An Applicant may disregard any Development(s) on the List if the proposed Development and any Development(s) on the List have one or more of the same Financial Beneficiaries and meet at least one of the following criteria: (i) they are contiguous or are divided by a street, and/or (ii) they are divided by a prior phase of the proposed Development. If this provision applies to the proposed Development, identify the Development(s) on the List at question 5.c.(2) of Exhibit A.

In addition, in the event that both the loan guaranteed under the Guarantee Fund Program and any Subordinate Mortgage Initiative (SMI) loan for one of the Developments on the List are paid off prior to the Application Deadline, the Corporation will treat the distance restriction around that Development as if it was never included on the List and the distance restriction related to that Guarantee Fund Development will no longer apply.

6. Set-Aside Commitments:

a. Minimum Set-Aside per Section 42 of the IRC:

The Applicant must elect one of the following minimum set-aside commitments:

- 20% of the units at 50% or less of the Area Median Income (AMI)
- 40% of the units at 60% or less of the AMI
- Deep rent skewing option as defined in Section 42 of the IRC, as amended

Note: Choosing the 20 percent at 50 percent AMI or less minimum set-aside will restrict ALL set-aside units at 50 percent or less of the AMI. Applicants may choose the 40 percent at 60 percent AMI or less minimum set-aside without committing to set aside any of the units at the 60 percent AMI level. For example, an Applicant may commit to set aside 40 percent at 50 percent AMI and this would also be considered 40 percent at 60 percent AMI or less.

b. Set-Aside Commitments per Corporation Requirements:

The Corporation has set-aside requirements beyond those required by Section 42 of the IRC which must be reflected on the Total Set-Aside Breakdown Chart at question 6.b. of Exhibit A, as outlined below:

(1) Total Set-Aside Commitment:

All Applicants must set aside a total of at least 80 percent of the proposed Development's total units at 60 percent AMI or less for the selected Demographic Commitment.

(2) ELI Set-Aside Commitments:

(a) Required Minimum ELI Set-Aside Commitments:

- (i) If the proposed Development does not qualify as an LDA Development as outlined in Item c. below, the Applicant must set aside at least 20 percent of the total units as ELI Set-Aside units. These units must be set aside at the ELI AMI level for the county where the proposed Development is located; or
- (ii) If the proposed Development qualifies as an LDA Development and meets all of the conditions outlined in Item c. below, the Applicant must set aside at least 30 percent of the total units as ELI Set-Aside units. These units must be set aside at the ELI AMI level for the county where the proposed Development is located.

The ELI County Chart is set out in Item 7 of Exhibit C of the RFA.

(b) Required ELI Units for Special Needs Households:

For proposed Developments with the Demographic Commitment at question 1 of Exhibit A of Family or Elderly non-ALF, the Applicant commits to set aside 50 percent of the ELI Set-Aside units for Special Needs Households and develop and execute a Memorandum of Understanding with at least one designated Special Needs

Household Referral Agency for the county where the proposed Development will be located (the deadline for the MOU will be established in the Carryover Allocation Agreement). Developments financed with HUD Section 202 or HUD Section 811 are exempt from this requirement.

For properties that have a Housing Assistance Payment Contract and/or an Annual Contributions Contract with HUD, but are not HUD Section 202 or HUD Section 811, the Applicant shall establish an owner-adopted preference in the admission policies for the Development, allowing the Applicant to create a preference or limited preference specifically for individuals or families who are referred by a partnering service agency. The partnering service agency must be a designated Special Needs Household Referral Agency in the county where the Development is located.

The purpose of the MOU is to establish the roles and responsibilities of the Development and lead agency(ies). These include roles and responsibilities regarding the Applicant notifying the lead agency that a unit is available; the lead agency referring households to apply for the set-aside unit; and the lead agency addressing the needs of the residents in the set-aside unit. A current list of Special Needs Household Referral Agencies for each county is published on the Corporation's Website under the link labeled Multifamily Programs/Related References (also accessible by clicking [here](#)).

c. Limited Development Area (LDA):

(1) A proposed Development will be designated as an LDA Development if:

- (a) It is located in a County or an area of a County that has been designated by the Corporation as an LDA area, and
- (b) The Applicant selected the applicable Demographic Commitment (Elderly, Family or Person with a Disability) that is associated with the LDA area.

Applicants should use the LDA Chart set out at Item 6 of Exhibit C of the RFA to determine whether the proposed Development qualifies as an LDA Development.

(2) For an LDA Development to be deemed eligible to be considered for funding under this RFA, it must meet all of the following conditions. An LDA Development that does not meet all of the following conditions will be ineligible to be considered for funding. The conditions are:

- (a) The Applicant demonstrated its commitment to set aside at least 30 percent of the total units as ELI Set-Aside units on the Total Set-Aside Breakdown Chart at question 6.b. of Exhibit A;
- (b) The proposed Development is classified as RA Level 1 or RA Level 2;
- (c) The Percentage of Total Units that will have Rental Assistance is greater than 75 percent; and
- (d) As of Application Deadline, the existing development is at least 75 percent occupied.

(3) If the proposed Development is located in a county where only a portion(s) of the county is included on the LDA Chart and the proposed Development's Demographic Commitment is one of the applicable Demographic Categories on the LDA Chart, the

Corporation will verify whether the Development Location Point stated on the Surveyor Certification form described in Section Four A.5. of the RFA is within the boundaries of the area designated as an LDA in order to determine whether the proposed Development qualifies as an LDA Development. To make such determination, Street Atlas USA 2013, published by DeLorme, will be used. If Street Atlas USA 2013 does not recognize the Development Location Point, then the proposed Development will be deemed to be an LDA Development and must meet all of the applicable conditions outlined in (2) above to be eligible for funding.

d. Total Set-Aside Breakdown Chart:

The Total Set-Aside Breakdown Chart must reflect all set-aside commitments (required set-asides and additional set-asides, including all required ELI Set-Asides) and the required total set-aside percentage (as further outlined below).

The Applicant must complete the Total Set-Aside Breakdown Chart at question 6.b. of Exhibit A. The Applicant must indicate on the chart the percentage of residential units, stated in whole numbers, to be set aside at each selected AMI level. Where reasonably possible, Applicants will be required to keep the unit mix consistent across each committed AMI level.

e. Affordability Period:

All Applicants are required to set aside the units for a minimum length of 50 years.

7. Site Control:

The Applicant must demonstrate site control by providing, as **Attachment 7** to Exhibit A, the documentation required in Items a., b., and/or c., as indicated below. If the proposed Development consists of Scattered Sites, site control must be demonstrated for all of the Scattered Sites.

- a. Eligible Contract – For purposes of the RFA, an eligible contract is one that has a term that does not expire before August 15, 2014 or that contains extension options exercisable by the purchaser and conditioned solely upon payment of additional monies which, if exercised, would extend the term to a date that is not earlier than August 15, 2014; specifically states that the buyer’s remedy for default on the part of the seller includes or is specific performance; and the buyer **MUST** be the Applicant unless an assignment of the eligible contract which assigns all of the buyer's rights, title and interests in the eligible contract to the Applicant, is provided. If the owner of the subject property is not a party to the eligible contract, all documents evidencing intermediate contracts, agreements, assignments, options, or conveyances of any kind between or among the owner, the Applicant, or other parties, must be provided, and, if a contract, must contain the following elements of an eligible contract: (i) have a term that does not expire before August 15, 2014 or contain extension options exercisable by the purchaser and conditioned solely upon payment of additional monies which, if exercised, would extend the term to a date that is not earlier than August 15, 2014, and (ii) specifically state that the buyer’s remedy for default on the part of the seller includes or is specific performance.
- b. Deed or Certificate of Title – The deed or certificate of title (in the event the property was acquired through foreclosure) must be recorded in the county in which the property is located and show the Applicant as the sole Grantee.
- c. Lease – The lease must have an unexpired term of at least 50 years after the Application

Deadline and the lessee must be the Applicant. If the owner of the subject property is not a party to the lease, all documents evidencing intermediate leases, subleases, assignments, or agreements of any kind between or among the owner, the lessor, or any sublessee, assignor, assignee, and the Applicant, or other parties, must be provided, and if a lease, must have an unexpired term of at least 50 years after the Application Deadline.

8. Funding:

a. Funding Request (Eligible Housing Credit Request Amount):

The Eligible Housing Credit Request Amount will be the amount of Housing Credit Allocation the Applicant will tentatively be awarded should the Application be selected for funding. Such Eligible Housing Credit Request Amount will be based on the lesser of (i) the Applicant's Housing Credit Request Amount (as provided by the Applicant in question 8.a. of Exhibit A) and (ii) the County Category Maximum Housing Credit Request Limit (as outlined in Item 8.a.(2) below). Any Housing Credit equity proposal provided as an attachment to the RFA must reflect the Eligible Housing Credit Request Amount, as further described in Item 8.d.(2)(a) below.

(1) In order for the Applicant's Housing Credit Request Amount to be eligible to be greater than the limits indicated in Column A of the chart set out at Item 8.a.(2) below, the proposed Development must qualify for the HUD High Cost Area (HCA) 30 percent boost via one of the three options outlined in Items (1)(a)(i), (1)(a)(ii), or (1)(b) below. If the Applicant intends to qualify for this higher Housing Credit Request Amount limit, it must complete the applicable questions at 8.a.(1) and (2) of Exhibit A.

(a) With regard to Housing Credits, HUD provides regulatory guidance on the effective date of Difficult Development Area (DDA) and Qualified Census Tract (QCT) lists for the purpose of determining whether a Development qualifies for an increase in eligible basis in accordance with Section 42(d)(5)(B) of the IRC.

(i) DDA –

In order to be classified as a Development located in a DDA for purposes of this RFA, as of the Application Deadline the proposed Development must be located in a HUD-designated DDA.

If located in a HUD-designated DDA, provide the requested information at question 8.a.(1)(a) of Exhibit A.

(ii) QCT –

If the proposed Development is not located in a DDA (as indicated by the Applicant at question 8.a.(1)(a) of Exhibit A), in order to be classified as a Development located in a QCT for purposes of this RFA, the proposed Development must be located in one of the QCTs based on the current census, as determined by HUD as of the Application Deadline, and the Applicant must provide a copy of a letter from the local planning office or census bureau verifying the Development's location in the referenced QCT as **Attachment 8** to Exhibit A.

(b) Multi-Phase –

If the Applicant indicates at question 8.a.(2)(a) of Exhibit A that the proposed Development is a phase of a multiphase Development where no phase was funded in the 2011 Universal Application Cycle or a Request for Applications (RFA) issued during calendar year 2013 and the proposed Development is selected for funding, the procedure and deadline for providing the required information will be included in the Carryover Allocation Agreement.

If the proposed Development is located in a HUD-designated DDA and/or QCT, per Item (a)(i) and/or (a)(ii) above, and it is an additional phase of a multi-phase Development where a phase was funded in the 2011 Universal Application Cycle or a Request for Applications (RFA) issued during calendar year 2013 and the funding was not returned, the Applicant should select question 8.a.(2)(b) of Exhibit A and provide the following information for such previously funded phase(s) as **Attachment 8** to Exhibit A:

Phase(s) of Multiphase Development Funded in 2011 Universal Application Cycle or a 2013 Request for Applications	
FHFC File No.	Development Name

If the proposed Development is not located in a HUD-designated DDA and/or QCT, per Item (a)(i) and/or (a)(ii) above, but it is an additional phase of a multi-phase Development where a phase was funded in the 2011 Universal Application Cycle or a Request for Applications (RFA) issued during calendar year 2013 and the funding was not returned, and this proposed Development is funded, then the HUD HCA status of the Development funded in the 2011 Universal Application Cycle or 2013 Request for Applications, as applicable, will apply for the additional phase proposed in this Application. The Applicant should select question 8.a.(2)(c) of Exhibit A and provide the following information for such previously funded phase(s) as **Attachment 8** to Exhibit A:

Phase(s) of Multiphase Development Funded in 2011 Universal Application Cycle or a 2013 Request for Applications	
FHFC File No.	Development Name

(2) Maximum Housing Credit Request Amount:

The Applicant must state the amount of Housing Credits it is requesting at question 8.a. of Exhibit A (“Applicant’s Housing Credit Request Amount”). The Applicant’s Housing Credit Request Amount cannot exceed the applicable County Category amount stated in the following chart:

County Category Maximum Housing Credit Request Limits

County Category* in which the Development is to be Located	Column A	Column B
	If Development is not located in a DDA or if the Application does not meet the RFA requirements to qualify as a QCT	HCA Bonus – If Development is located in a DDA; and/or if the Application meets the RFA requirements to qualify as QCT
Large County	\$1,276,000	\$1,660,000
Medium County	\$1,155,000	\$1,510,000
Small County	\$825,000	\$1,070,000

* County Categories are described in Section Four A.4.b. of the RFA.

If the Applicant states an amount that is greater than the amount the Applicant is eligible to request relative to the above chart, the Corporation will reduce the amount down to the maximum amount the Applicant is eligible to request as provided in the chart above.

The amount resulting from the lesser of the Applicant's Housing Credit Request Amount (as stated at question 8.a. of Exhibit A) and the adjustment described above, if any, will be deemed to be the Applicant's Eligible Housing Credit Request Amount.

b. Other Funding:

- (1) If the Development has received funding from the Predevelopment Loan Program (PLP), the Corporation file number and amount of funding must be listed. Note: PLP funding cannot be used as a source of financing on the Construction/Rehab Analysis or the Permanent Analysis.
- (2) The Applicant must list any other Corporation funding that is intended to be utilized as a source of financing for the proposed Development.
- (3) If the proposed Development will be assisted with funding under the United States Department of Agriculture RD 515 Program and/or RD 538 Program, the following information must be provided:
 - (a) Indicate the applicable RD Program(s).
 - (b) For a proposed Development that will be assisted with funding from RD 515:
 - (i) Include the funding amount at the USDA RD Financing line item on the Development Funding Pro Forma (Construction/Rehab Analysis and/or Permanent Analysis); and
 - (ii) Provide a letter from RD, dated within six (6) months of the Application Deadline, as **Attachment 9** to Exhibit A, which includes the following information for the proposed Preservation Development:
 - Name of existing development;
 - Name of proposed Development;
 - Loan balance;
 - Acknowledgment that property is applying for Housing Credits;
 - Applicable RD program; and
 - Acknowledgment that the property will remain in the USDA RD 515 loan portfolio.
 - (c) If the proposed Development will be assisted with funding under the RD 538 Program, the Applicant must:
 - (i) Include the funding amount at the USDA RD Financing line item on the Development Funding Pro Forma (Construction/Rehab Analysis and/or Permanent Analysis); and
 - (ii) Provide the letter sent to the Applicant by an RD 538 approved lender certifying that the lender is prepared to make a loan consistent with the program requirements through the Section 538 Guaranteed Rural Rental Housing ("538") Loan Program as **Attachment 9** to Exhibit A.

As outlined in Item 9.c.(17) of Exhibit A, the Section 538 Selection letter must be provided during credit underwriting.

c. Finance Documents:

The Development Cost Pro Forma must include (i) all anticipated sources of funding for the proposed Development and (ii) all anticipated costs of the Development construction, rehabilitation and, if applicable, acquisition, including the Developer fee and General Contractor fee, as outlined below. Any amounts that are not an anticipated cost to the Development, such as waived fees or charges, cannot be included in the Development Cost Pro Forma. Note: deferred Developer fees are not considered “waived fees”.

(1) Developer Fee

Developer fee shall be limited to 16 percent of Development Cost. The maximum allowable Developer fee will be tested during the scoring of the Application by multiplying the Development Cost by 16 percent, carried to 2 decimal places and may not be rounded.

The Corporation will allow up to 100 percent of the eligible Developer fee to be deferred and used as a source on the Development Cost Pro Forma without the requirement to show evidence of ability to fund.

(2) General Contractor Fee

General Contractor fee shall be limited to 14 percent of actual construction cost. The maximum allowable General Contractor fee will be tested during the scoring of the Application by multiplying the actual construction cost by 14 percent, carried to 2 decimal places and may not be rounded.

(3) Contingency Reserves:

The maximum hard and soft cost contingencies allowed cannot exceed (i) 5 percent for Development Categories of New Construction, Redevelopment, or Acquisition/Redevelopment or (ii) 15 percent for Development Categories of Rehabilitation, Acquisition/Rehabilitation, Preservation, or Acquisition/Preservation. The determination of the contingency reserve is limited to the maximum stated percentage of the combined total of total actual construction costs (hard costs) and general development costs (soft costs).

(4) Operating Deficit Reserves:

An operating deficit reserve is not to be included as part of Development Costs and cannot be used in determining the maximum Developer fee. The operating deficit reserve or any other reserves other than contingency reserves as provided above are not permitted in the Application. An operating deficit reserve, if necessary, will be permitted and sized in credit underwriting. Operating deficit reserves include, but are not limited to, operating reserves, debt service reserves, lease-up reserves, and any pre-funded capital (replacement) reserves.

Developer fee and General Contractor fee must be disclosed. In the event the Developer fee and/or General Contractor fee are/is not disclosed on the Development Cost Pro Forma, the Corporation will assume that these fees will be the maximum allowable and will add the maximum amount(s) to Total Development Cost. If an Applicant lists a Developer fee,

General Contractor fee, contingency reserve or operating deficit reserve that exceeds the stated Application limits, the Corporation will adjust it/them to the maximum allowable.

d. Non-Corporation Funding Proposals:

In order for funding to be counted as a source on the Construction/Rehab and/or Permanent Analysis, the Applicant must provide documentation of all financing proposals from both the construction and the permanent lender(s), equity proposals from the syndicator, and other sources of funding. The financing proposals must state whether they are for construction financing, permanent financing, or both, and all attachments and/or exhibits referenced in the proposal must be included. Insert documentation for each source as **Attachment 10** to Exhibit A and continue with sequentially numbered attachments for each additional funding source. Evidence for each funding source must be behind its own sequentially numbered attachment.

For purposes of the Application, neither net operating income nor capital contributions will be considered a source of financing.

(1) Financing Proposal

Financing proposal documentation, regardless of whether the documentation is in the form of a commitment, proposal, term sheet, or letter of intent, must meet the following criteria. Evidence for each funding source must be behind its own numbered attachment.

(a) Each financing proposal shall contain:

- (i) Amount of the construction loan, if applicable;
- (ii) Amount of the permanent loan, if applicable;
- (iii) Specific reference to the Applicant as the borrower or direct recipient; and
- (iv) Signature of all parties, including acceptance by the Applicant.

Note: Although Local Government Contributions is not included in this RFA as a point item, eligible Local Government financial commitments can be considered a source of financing without meeting the requirements of (i) through (iv) above if the Applicant provides the properly completed and executed Local Government Verification of Contribution – Grant Form (Form 01-14) and/or the Local Government Verification of Contribution – Loan Form (Form 01-14) and such grant and/or loan is effective at least through June 30, 2014. The grant and loan forms (Form 01-14) can be accessed by clicking [here](#). If the loan form is used, the space for entering the net present value of the loan is not applicable to this RFA and will not be considered. For purposes of this requirement, the Applicant may utilize the 2013 Local Government Verification of Contribution – Grant Form and/or the 2013 Local Government Verification of Contribution – Loan Form, provided the information entered on the form(s) complies with the requirements of this RFA.

(b) Financing that has closed:

- (i) If the financing has closed in the Applicant's name, provide a letter from the lender acknowledging that the loan has closed. The letter must also include the following information:

- Amount of the construction loan, if applicable;
 - Amount of the permanent loan, if applicable; and
 - Specific reference to the Applicant as the borrower/direct recipient/mortgagee.
- (ii) Except for HUD and RD funding, if the financing involves an assumption of debt not currently in the Applicant's name, as evidence that the lender approves of the proposal of assumption, the Applicant must provide a letter from the lender, dated within six (6) months of the Application Deadline, that includes the following information:
- Specifically references the Applicant as the assuming party;
 - If a permanent loan, states the amount to be assumed; and
 - If a construction loan, states the maximum amount of funding capacity.

If the debt being assumed is provided by HUD, the Applicant must provide a letter from HUD, dated within six (6) months of the Application Deadline, confirming the funding source. The letter must include the following information:

- Name of existing development;
- Name of proposed Development;
- Loan balance;
- Acknowledgment that property is applying for Housing Credits; and
- Applicable HUD program.

If the debt being assumed is provided by RD, the Applicant is only required to provide the information described in Item 8.b.(3) above.

- (c) If the financing proposal is not from a regulated Financial Institution in the business of making loans or a governmental entity, evidence of ability to fund must be provided. Evidence of ability to fund includes: (1) a copy of the lender's most current audited financial statements no more than 17 months old; or (2) if the loan has already been funded, a copy of the note and recorded mortgage. The age of all financial statements is as of the Application Deadline. In evaluating ability to fund, the Corporation will consider the entity's unrestricted current assets typically used in the normal course of business. Assets considered restricted include, but are not limited to, pension funds, rental security deposits, and sinking funds. Financing proposals from lenders who cannot demonstrate ability to fund will not count as a source of financing. Financial statements must be included in the Application. Note: This provision does not apply to deferred Developer fee.
- (d) If a financing proposal shows an amount less than the corresponding line item on the pro forma, only the financing proposal amount will be considered as a funding source. However, if a financing proposal shows an amount in excess of the corresponding line item on the pro forma, up to the total amount of the financing proposal amount may be utilized as a funding source, if needed.
- (e) The loan amount may be conditioned upon an appraisal or debt service coverage ratio or any other typical due diligence required during credit underwriting.

- (f) Financing proposals may be conditioned upon the Applicant receiving the funding from the Corporation for which it is applying.
- (g) If a financing proposal has a provision for holding back funds until certain conditions are met, the amount of the hold-back will not be counted as a source of construction financing unless it can be determined that the conditions for the release of the hold-back can be met prior to or simultaneous with the closing of the Development's permanent financing.
- (h) Grant funds are contributions to the Development, other than equity, which carry no repayment provision or interest rate. A commitment for grant funds will be considered a commitment for scoring purposes if the commitment is properly executed and, if applicable, evidence of ability to fund is provided.

(2) Housing Credit Equity Proposal

For the purpose of this RFA, to be counted as a source an equity proposal, regardless of whether the documentation is in the form of a commitment, proposal, term sheet or letter of intent, must: (i) if syndicating/selling the Housing Credits, meet the requirements outlined in (a) below and include the information outlined in (b) below, or (ii) if not syndicating/selling the Housing Credits, meet the requirements outlined in (a) below and include the information outlined in (c) below:

- (a) If the Eligible Housing Credit Request Amount is less than the anticipated amount of credit allocation stated in the equity proposal, the equity proposal will not be considered a source of financing. However, if the Eligible Housing Credit Request Amount is greater than the anticipated amount of credit allocation stated in the equity proposal, the equity proposal will be considered a source of financing; and
- (b) If syndicating/selling the Housing Credits:
 - (i) A Housing Credit equity proposal must also meet the following criteria:
 - Be executed by all parties, including the Applicant;
 - Include specific reference to the Applicant as the beneficiary of the equity proceeds;
 - State the proposed amount of equity to be paid prior to construction completion;
 - State the anticipated Eligible Housing Credit Request Amount;
 - State the anticipated dollar amount of Housing Credit allocation to be purchased; and
 - State the anticipated total amount of equity to be provided.
 - (ii) If the limited partnership agreement or limited liability company operating agreement has closed, the closed agreement must be provided. To be counted as a source of financing, the partnership agreement or operating agreement must meet the requirements of Item 8.d.(2)(b)(i) above or the Applicant must submit separate documentation, signed by the equity provider, expressly stating any required criteria not provided in the agreement.

Note: Item 9.b.(2)(f) of Exhibit A outlines the requirement and deadline for the Applicant's confirmation that the documented equity amount to be paid prior to

or simultaneous with the closing of construction financing is at least 15 percent of the total proposed equity to be provided (the 15 percent criteria).

(c) If not syndicating/selling the Housing Credits, the owner's commitment to provide equity must be provided.

(i) The commitment must include the following:

- The proposed amount of equity to be paid prior to construction completion;
- The anticipated Eligible Housing Credit Request Amount;
- The anticipated dollar amount of Housing Credit allocation to be purchased; and
- The anticipated total amount of equity to be provided.

(ii) Evidence of ability to fund must be provided as an Attachment to the Application.

(3) Historic Tax Credit Equity Proposal

An Applicant utilizing Historic Tax Credit equity as a source of funding must have the proposed Development certified as a historic structure by the National Park Service or the site must include at least one structure that is certified as a historic structure by the National Park Service.

For the purpose of this RFA, to be counted as a source an equity proposal, regardless of whether the documentation is in the form of a commitment, proposal, term sheet or letter of intent, must include the information outlined below. In addition, the Applicant must answer the questions at 8.d.(2) of Exhibit A.

(a) The Historic Tax Credit equity proposal must meet the following criteria:

- (i) Be executed by all parties, including the Applicant;
- (ii) Include specific reference to the Applicant as the beneficiary of the equity proceeds;
- (iii) State the anticipated dollar amount of Historic Tax Credit allocation to be purchased;
- (iv) State the proposed amount of equity to be paid prior to construction completion; and
- (v) State the anticipated total amount of equity to be provided.

A copy of Part 2 of the Historic Tax Credit application and evidence of its approval must be provided prior to completion of a credit underwriting report. Since Part 3 of the Application is not reviewed by the National Park Service until after completion of the proposed Development, the Applicant will be required to submit the final certification decision concerning the award of the Historic Tax Credits as a part of the Final Cost Certification Application. Although Development costs utilized to qualify for an award of Historic Tax Credits can be included as part of the proposed Development's Total Development Costs, the amount of rehabilitation expenditures eligible for Housing Credit basis must be reduced by the amount of the Historic Tax Credits to be claimed.

(b) For Applicants utilizing Historic Tax Credit equity as a source of funding:

(i) Florida Housing must be able to confirm the historic certification of the proposed Development by the National Park Service. To assist with the verification, the Applicant must provide the following information, at question 8.d.(2) of Exhibit A, related to the proposed Development from the National Park Service's National Register of Historic Places:

- Eight-Digit Reference Number;
- Resource Name;
- Address; and
- Primary Certification Date

and

(ii) The Applicant must state, at question 8.d.(2) of Exhibit A, the amount of qualified rehabilitation costs on which the Historic Tax Credit award is based. The Historic Tax Credit allocation provided in the Historic Tax Credit equity proposal cannot exceed 20 percent of the qualified rehabilitation costs stated herein. If the stated Historic Tax Credit allocation is higher than this limitation, then the amount of Historic Tax Credit equity will be reduced on a pro rata basis.

e. Per Unit Construction Funding Preference:

(1) The following Applications will qualify for this funding preference, as outlined in Section Four B of the RFA:

Applications that reflect an amount of at least \$32,500 per unit when the amount listed in the Total column of the Development Cost Pro Forma for the Development Cost line item A1.1 Actual Construction Cost is divided by the number of total units in the Development.

(2) The following Applications will not qualify for this funding preference:

Applications that reflect an amount less than \$32,500 per unit, when the amount listed in the Total column of the Development Cost Pro Forma for the Development Cost line item A1.1 Actual Construction Cost is divided by the number of total units in the Development.

Indicate whether the proposed development qualifies for this funding preference at question 8.e. of Exhibit A.

Except for deferred Developer fee, the Application requires complete information on all sources of Development funding and the proposed uses of those funds. All loans, grants, donations, syndication proceeds, etc., should be detailed in the Application as outlined above. The total amount of monetary funds determined to be in funding proposals must equal or exceed uses.

9. Applicant Certification and Acknowledgement:

The Applicant's signature on Exhibit A indicates the Applicant's certification and acknowledgement of the provisions and requirements of the RFA. The copy of the Application labeled "Original Hard Copy" must reflect an original signature (blue ink is preferred).

Addenda:

The Applicant may use the Addenda section of Exhibit A to provide any additional information or explanatory addendum for items in the Application. Please specify the particular Item to which the additional information or explanatory addendum applies.

B. Funding Selection:

1. Eligibility: Only Applications that are eligible for funding will be considered for funding selection. Eligibility requirements include the following:

Eligibility Requirements	Described in RFA at:
Submission Requirements	Section Three A and Section Five
Financial Arrearage Requirements	Section Five
Preservation Development Category Requirements	Section Four A.4.c.
LDA Development Conditions	Section Four A.6.c.
Minimum Transit Score, if applicable	Section Four A.5.b.(2)
Minimum Total Proximity Score	Section Four A.5.b.(2)
Mandatory Distance Requirement	Section Four A.5.d.
Total Development Cost Per Unit Limitation	Item.9.c.(16) of Exhibit A and Item 8 of Exhibit C
All Mandatory Items	Section Five

2. Ranking Process: All eligible Applications will be sorted in the following order:
 - a. First by the Age of Development (with preference given to Applications that demonstrate within the documentation provided at question 4.c. of Exhibit A that the proposed Development was originally built in the year 1984 or earlier);
 - b. Next by RA Level 1, 2 or 3 (with preference given to Applications that achieve an RA Level Classification of RA Level 1, 2 or 3 at Section Four A.4.c. of the RFA);
 - c. Next by the Application’s eligibility to be considered to be concrete construction, as outlined at Section Four A.4.c.(3) of the RFA (with Applications considered to be concrete construction listed above Applications that are not considered to be concrete construction);
 - d. Next by the Application’s eligibility for the Per Unit Construction Funding Preference which is outlined in Section Four A.8.e. of the RFA (with Applications that qualify for the preference listed above Applications that do not qualify for the preference);
 - e. Next by the Application’s Leveraging Classification which is outlined in Exhibit C below (with Applications that receive the Classification of A listed above Applications that receive the Classification of B);
 - f. Next by the Application’s eligibility for the Proximity Funding Preference, as outlined at Section Four A.5.b.(2) of the RFA (with Applications that qualify for the preference listed above Applications that do not qualify for the preference);
 - g. Next by RA Level (with preference given to Applications with the lowest RA Level Classification so that RA Level 1 Applications receive the most preference and RA Level 6 Applications receive the least preference);
 - h. Next by the Application’s eligibility for the Florida Job Creation Preference which is outlined in Exhibit C below (with Applications that qualify for the preference listed above Applications that do not qualify for the preference);
 - i. And finally by lottery number, resulting in the lowest lottery number receiving preference.
3. Funding Test: Applications will be selected for funding only if there is enough funding available to fully fund the Eligible Housing Credit Request Amount.

4. County Test: Funding will be limited to 1 Application per county (County Test), unless the only eligible unfunded Applications that can meet the Funding Test are located in a county where an Application has already been tentatively selected for funding, as further outlined below.
5. Goals: The Corporation has a goal to fund at least one Elderly RD Preservation Development and up to one Family Demographic Development. To be eligible for the Elderly RD Preservation Development goal, the Application must have selected the Elderly Demographic at question 1 of Exhibit A and must have met the RD funding requirements outlined in Section Four A.8.b.(3)(b) and/or (c) of the RFA (i.e., for the RD 515 Program with or without the RD 538 Program, or the RD 538 Program without the RD 515 Program). To be eligible for the Family Demographic Development goal, the Applicant must have selected the Family Demographic at question 1 of Exhibit A. Any Application selected to meet these goals will count for purposes of the County Test. The Corporation is not precluded from funding another eligible Elderly Demographic Application that also qualified for the Elderly RD Preservation Development goal, subject to the County Test and the Funding Test.
6. Selection Process: The first Applications selected will be eligible Applications that meet the goals.

The first Application that will be selected for funding will be the highest ranked eligible Application that is eligible for the Elderly RD Preservation Development goal. If this goal is met, or if there are no eligible Applications that meet this goal, then the next Application that will be considered for funding will be the highest ranked eligible Application that is eligible for the Family Demographic Development goal. If the Family Demographic Development goal is met, or if there are no eligible Applications that meet this goal, then the next Applications that will be considered for funding will be the highest ranked eligible unfunded Applications with the Demographic of Elderly or Person with a Disability (the Applicant selected the Elderly or Person with a Disability Demographic at question 1 of Exhibit A) that can meet both the County Test and the Funding Test.

If funding remains and there are no eligible unfunded Elderly or Person with a Disability Demographic Applications that meet both the County Test and the Funding Test, then the highest ranked eligible unfunded Elderly or Person with a Disability Demographic Application that can meet the Funding Test will be selected for funding, without regard to the County Test. If none of the eligible unfunded Elderly or Person with a Disability Demographic Applications meet the Funding Test, no further Applications will be considered for funding and any remaining funding will be distributed as approved by the Board.

7. Returned Allocation:

Funding that becomes available after the Board takes action on the Committee's recommendation(s), due to an Applicant withdrawing its Application, an Applicant declining its invitation to enter credit underwriting, or the Applicant's inability to satisfy a requirement outlined in this RFA and/or Rule Chapter 67-48, F.A.C., will be distributed in the following manner:

- a. If the funding was originally awarded to an Application selected to meet the Elderly RD Preservation Development goal, the returned funding will be distributed as follows:
 - (1) If another Application was funded that was eligible for the goal, then the goal will still be considered to be met and the returned funds will be distributed to the highest ranked eligible unfunded Elderly or Person with a Disability Demographic Application that

meets both of the following criteria: (a) is located in a county where no Elderly or Person with a Disability Demographic Application is currently funded under this RFA and (b) can be fully funded. If there is no eligible unfunded Elderly or Person with a Disability Demographic Application that can meet both of the above-described criteria, then the funds will be distributed to the highest ranked eligible unfunded Elderly or Person with a Disability Demographic Application regardless of the county, provided the Application can be fully funded. If such Application cannot be fully funded, then the remaining funding will be distributed as approved by the Board.

or

- (2) If no other Application was funded that was eligible for the Elderly RD Preservation Development goal, then the returned funds will be distributed to the highest ranked eligible unfunded Application eligible for the Elderly RD Preservation goal that can be fully funded. If there is no eligible unfunded Application that meets this goal, or if there is an eligible unfunded Application that meets this goal but it cannot be fully funded, then the funds will be distributed to the highest ranked eligible unfunded Elderly or Person with a Disability Demographic Application that meets both of the following criteria: (a) is located in a county where no Elderly or Person with a Disability Demographic Application is currently funded under this RFA and (b) can be fully funded. If there is no eligible unfunded Elderly or Person with a Disability Demographic Application that can meet both of the above-described criteria, then the funds will be distributed to the highest ranked eligible unfunded Elderly or Person with a Disability Demographic Application regardless of the county, provided the Application can be fully funded. If such Application cannot be fully funded, then the remaining funding will be distributed as approved by the Board.
- b. If the funding was originally awarded to an Application selected to meet the Family Demographic Development goal, the returned funding will be distributed to the highest ranked eligible unfunded Family Demographic Application(s) that meets both of the following criteria: (i) is located in a county where no other Application (regardless of the Demographic Commitment) is currently funded under this RFA and (ii) can be fully funded. If there are no eligible unfunded Family Demographic Applications that can meet both of the above-described criteria, then the funds will be distributed to the highest ranked eligible unfunded Application(s) that can meet both of the above-described criteria, regardless of the Application's Demographic Commitment. If funding remains but no eligible unfunded Applications can be fully funded, then the remaining funding will be distributed as approved by the Board.
- c. If the funding was originally awarded to an Elderly or Person with a Disability Demographic Application, the returned funding will be distributed to the highest ranked eligible unfunded Elderly or Person with a Disability Demographic Application(s) that meets both of the following criteria: (i) is located in a county where no other Application (regardless of the Demographic Commitment) is currently funded under this RFA and (ii) can be fully funded. If there are no eligible unfunded Elderly or Person with a Disability Demographic Applications that can meet both of the above-described criteria, then the remaining funding will be distributed as approved by the Board.

**SECTION FIVE
EVALUATION PROCESS**

Committee members shall independently evaluate and score their assigned portions of the submitted Applications, consulting with non-committee Corporation staff and legal counsel as necessary and appropriate.

The Corporation will reject any competitive Application submittal and no action will be taken to score the Application if any of the following submission requirements are not met: (i) the Application is not submitted online by the Application Deadline, (ii) the required number of hard copies are not submitted by the Application Deadline, (iii) the Applicant’s hard copy submission is not contained in a sealed package, (iv) the required Application fee is not submitted as of Application Deadline, or (v) the proposed Development is not eligible for funding under this RFA because it meets the criteria outlined in paragraph 67-48.023(1)(a) and/or (b), F.A.C., and/or it meets the criteria outlined in paragraph 67-48.023(1)(c), F.A.C. and does not meet one of the stated exceptions.

An Application will be deemed ineligible to be considered for funding if, as of close of business the day before the Committee meets to make a recommendation to the Board, there are any financial obligations for which an Applicant or Developer or Principal, Affiliate or Financial Beneficiary of the Applicant or Developer is in arrears to the Corporation or any agent or assignee of the Corporation as reflected on the most recently published Past Due Report posted to the Corporation’s Website under the link Property Owners & Managers/Past Due Reports (also accessible by clicking [here](#)), but not more recently than five (5) business days prior to the date the Committee meets to make a recommendation to the Board.

Applications will be scored based on the following Mandatory items:

Mandatory Items
Demographic Commitment
Name of Applicant
Evidence Applicant is a legally formed entity
Principals for Applicant and for each Developer
Name of Each Developer
Evidence that each Developer entity is a legally formed entity
Prior General Development Experience Chart for experienced Principal of Developer
Name of Proposed Development
County identified
Address of Development Site
Development Type
Total Number of Units
Number of new construction units and rehabilitation units
Estimated qualified basis in Rehabilitation Expenses per set-aside unit
Minimum Set-Aside election
Total Set-Aside Breakdown Chart
Evidence of Site Control
Applicant Housing Credit Request Amount
Development Cost Pro Forma (listing expenses or uses) and Construction/Rehab analysis and Permanent analysis (listing sources) – Sources must equal or exceed uses
Executed Applicant Certification and Acknowledgement (original signature in “Original Hard Copy”)

The Committee shall conduct at least one public meeting during which the Committee members may discuss their evaluations, select Applicants to be considered for award, and make any adjustments deemed necessary to best serve the interests of the Corporation’s mission. The Committee will list the Applications deemed eligible for funding in order from highest total score to lowest total score, applying

the funding selection criteria outlined in Section Four B above, and develop a recommendation or series of recommendations to the Board.

The Board may use the Applications, the Committee's scoring, any other information or recommendation provided by the Committee or staff, and any other information the Board deems relevant in its selection of Applicants to whom to award funding. Notwithstanding an award by the Board pursuant to this RFA, funding will be subject to a positive recommendation from the Credit Underwriter based on criteria outlined in the credit underwriting provisions in Rule Chapter 67-48, F.A.C.

SECTION SIX AWARD PROCESS

The Corporation shall provide notice of its decision, or intended decision, for this RFA on the Corporation's Website the day of the applicable Board vote. After posting, an unsuccessful Applicant may file a notice of protest and a formal written protest in accordance with Section 120.57(3), Fla. Stat., et. al. Failure to file a protest within the time prescribed in Section 120.57(3), Fla. Stat., et. al. shall constitute a waiver of proceedings under Chapter 120, Fla. Stat.

Exhibit A to RFA 2014-104 - Preservation of Existing Affordable Housing Developments

1. Demographic Commitment:

The Applicant must select one Demographic Commitment:

- a. Family
- b. Elderly – Indicate the type of Elderly Development:
 - Elderly ALF
 - Elderly non-ALF
- c. Person with a Disability

2. Applicant Information:

- a. The Applicant must state the name of the Applicant: _____
- b. The Applicant must provide the required documentation to demonstrate that the Applicant is a legally formed entity qualified to do business in the state of Florida as of the Application Deadline as **Attachment 1**.
- c. Is the Applicant applying as a Non-Profit organization?
 - Yes
 - No
- d. Principals for the Applicant and for each Developer:

The Applicant must provide the required information for the Applicant and for each Developer as **Attachment 2**.

- e. Contact Person for this Application:

First Name: _____ Middle Initial: _____

Last Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Facsimile: _____

E-Mail Address: _____

Relationship to Applicant: _____

3. Developer Information:

- a. The Applicant must state the name of each Developer (including all co-Developers):

b. For each Developer entity listed in question 3.a. above (that is not a natural person), the Applicant must provide, as **Attachment 3**, the required documentation demonstrating that the Developer is a legally formed entity qualified to do business in the state of Florida as of the Application Deadline.

c. General Developer Experience:

For each experienced Developer entity, the Applicant must provide, as **Attachment 4**, a prior experience chart for at least one (1) experienced Principal of that entity. The prior experience chart for the Principal must reflect the required information for the three (3) completed affordable rental housing developments, one (1) of which must be a Housing Credit development.

4. General Development Information:

a. The Applicant must state the name of the proposed Development: _____

b. Location of Development Site:

(1) The Applicant must indicate the County: _____

(2) Address of Development Site:

The Applicant must state (i) the address number, street name, and name of city and/or (ii) the street name, closest designated intersection, and either name of city or unincorporated area of county:

c. Preservation Development Category / Rental Assistance (RA) Level / Concrete Construction:

(1) The Applicant must indicate the applicable Preservation Development Category and provide the required HUD or RD letter as **Attachment 5**:

- Preservation
- Acquisition and Preservation

(2) Is the existing development at least 75 percent occupied as of Application Deadline?

- Yes
- No

(3) The Applicant must indicate the estimated qualified basis in Rehabilitation expenses per set aside unit within one 24-month period for the buildings(s) being rehabilitated: \$_____.

(4) Does the proposed Development meet the requirements to be considered to be concrete construction?

- Yes
- No

d. The Applicant must select one applicable Development Type: _____

e. Number of Units in Proposed Development:

(1) The Applicant must state the total number of units: _____

(2) The Applicant must select the applicable item below:

- (a) Proposed Development consists of 100% rehabilitation units
- (b) Proposed Development consists of a combination of new construction units and rehabilitation units. State the quantity of each type:
_____ new construction units and _____ rehabilitation units

5. Proximity:

In order to be considered for any points, the Applicant must provide an acceptable Surveyor Certification form as **Attachment 6**. The form must reflect the Development Location Point and Services information for the Bus or Rail Transit Service (if Private Transportation is not selected at question 5.b. below) and Community Services for which the Applicant is seeking points.

a. PHA Proximity Point Boost:

Are all of the units in the proposed Development located on a site(s) with an existing Declaration of Trust between a Public Housing Authority and HUD?

- Yes ○ No

If “Yes”, in order to be eligible for the PHA Proximity Point Boost, the Applicant must provide the required letter as **Attachment 6**, as outlined in Section Four A.5.b.(1) of the RFA.

b. Private Transportation Transit Service:

If the Applicant selected the Elderly or Person with a Disability Demographic Commitment at question 1 above, does the Applicant commit to provide private transportation, as outlined in Section Four A.5.c.(1)(a) of the RFA, as its Transit Service?

- Yes ○ No

c. Mandatory Distance Requirement:

For proximity of the proposed Development to the closest Development latitude and longitude coordinates identified on the FHFC Development Proximity List, indicate which of the following applies to this Application. Applicants that are eligible to select (1) below will be eligible for the automatic qualification for the Mandatory Distance Requirement. Applicants not eligible for the automatic qualification for the Mandatory Distance Requirement should select (2) below and follow the instructions outlined in Section Four A.5.d.(2) of the RFA to determine whether the Application meets the Mandatory Distance Requirement.

- (1) The Application is eligible for the automatic qualification because the proposed Development involves an existing, occupied residential rental property in operation as of the Application Deadline, and the proposed Development meets all of the following criteria: (i) the Applicant demonstrated its commitment to set aside at least 30 percent of the total units as ELI Set-Aside units on the Total Set-Aside Breakdown Chart at question

6.b. of Exhibit A, (ii) the proposed Development is classified as RA Level 1 or RA Level 2*, (iii) the Percentage of Total Units that will have Rental Assistance is greater than 75 percent, and (iv) the Applicant indicated at question 4.c.(2) of Exhibit A that, as of Application Deadline, the existing Development is currently at least 75 percent occupied.

- o (2) The Application is not eligible for the automatic qualification.

The Applicant may disregard Development(s) on the List if the proposed Development and any Development(s) on the List have one or more of the same Financial Beneficiaries and meet at least one of the following criteria: (i) they are contiguous or divided by a street, and/or (ii) they are divided by a prior phase of the proposed Development. If this provision applies to the proposed Development, the Applicant must identify the specific Development(s) on the List that it wishes to disregard (as outlined in Section Four A.5.d.(2) of the RFA):

* RA Levels are described in Section Four A.4.c.(2) of the RFA.

6. Set-Aside Commitments:

- a. Minimum Set-Aside per Section 42 of the IRC:

The Applicant must select one of the following:

- o 20% of units at 50% Area Median Income (AMI) or lower
- o 40% of units at 60% AMI or lower
- o Deep rent skewing option as defined in Section 42 of the IRC, as amended

- b. Total Set-Aside Breakdown Chart:

The Applicant must reflect on the Total Set-Aside Breakdown Chart below all set-aside commitments (required set-asides and additional set-asides, including all required ELI Set-Asides, as well as the total set-aside percentage) by listing the percentage of residential units, stated in whole numbers, to be set aside at each selected AMI level:

Total Set-Aside Breakdown Chart	
Percentage of Residential Units	AMI Level
%	At or Below 25%
%	At or Below 28%
%	At or Below 30%
%	At or Below 33%
%	At or Below 35%
%	At or Below 40%
%	At or Below 45%
%	At or Below 50%
%	At or Below 60%
Total Set-Aside Percentage:	%

7. Site Control:

The Applicant must demonstrate site control by providing the following documentation as **Attachment 7**, as outlined at Section Four A.7. of the RFA:

- a. A fully executed eligible contract for purchase and sale for the subject property; and/or
- b. A recorded deed or recorded certificate of title; and/or
- c. A copy of the fully executed long-term lease.

8. Funding:

- a. State the Applicant’s Housing Credit Request Amount (annual amount): \$ _____

(1) Difficult Development Area (DDA) and Qualified Census Tract (QCT):

- (a) Is the proposed Development located in a DDA, as defined in Section 42(d)(5)(B)(iii), IRC, as amended?

- Yes No

If “Yes”, indicate which DDA: _____

- (b) If the proposed Development is not located in a DDA (as indicated by the Applicant in question (a) above), is it located in a QCT as defined in Section 42(d)(5)(B)(ii) of the IRC, as amended?

- Yes No

If “Yes”, indicate the QCT Number: _____ and provide a copy of a letter from the local planning office or census bureau which verifies that the proposed Development is located in the referenced QCT as **Attachment 8**.

(2) Multi-Phase Development:

If the answer to question (1)(a) and/or (1)(b) above is “Yes”, indicate which of the following applies (question (2)(a), (2)(b) or (2)(d) below):

If the answer to both questions (1)(a) and (1)(b) above is “No”, indicate which of the following applies (question (2)(c) or (2)(d) below):

- (a) The proposed Development is located in a HUD-designated DDA and/or QCT and is a phase of a multiphase Development, as defined in Section Four A.8.a.(1) of the RFA, where no phase was funded in the 2011 Universal Application Cycle or a Request for Applications (RFA) issued during calendar year 2013.

or

- (b) The proposed Development is located in a HUD-designated DDA and/or QCT and is an additional phase of a multi-phase Development where a phase was funded in the 2011 Universal Application Cycle or a Request for Applications (RFA) issued during

calendar year 2013. Provide the required information regarding the previously funded phase(s) as **Attachment 8**.

or

- (c) The proposed Development is not located in a HUD-designated DDA or QCT, but it is an additional phase of a multi-phase Development where a phase was funded in the 2011 Universal Application Cycle or a Request for Applications (RFA) issued during calendar year 2013. Provide the required information regarding the previously funded phase(s) as **Attachment 8**.

or

- (d) Neither (a), (b), nor (c) above applies to the proposed Development.

b. Other Funding:

- (1) If a PLP loan has been awarded for this Development, provide the following information:

Corporation File #	Amount of Funding
_____	\$ _____

- (2) If any other Corporation funds will be incorporated as a source of financing for the proposed Development, provide the information in the chart below:

Corporation Program	Corporation File No.	Amount of Funding
SAIL		\$
HOME-Rental		\$
MMRB		\$
EHCL		\$

- (3) If the proposed Development will be assisted with funding under the United States Department of Agriculture RD 515 Program and/or the RD 538 Program, indicate the applicable program(s) below and provide the required documentation as **Attachment 9**:

RD 515 RD 538

c. Finance Documents:

The Applicant must complete the Development Cost Pro-Forma, the Detail/Explanation Sheet, if applicable, the Construction or Rehab Analysis, and the Permanent Analysis.

d. Non-Corporation Funding Proposals:

- (1) The Applicant must attach all funding proposals executed by the lender(s) or other source(s). Insert the documentation for each source as a separate attachment to Exhibit A beginning with **Attachment 10** and continuing with sequentially numbered attachments for each additional funding source.
- (2) If Historic Tax Credit equity will be utilized as a source of funding, in addition to providing the information required at Section Four A.8.d.(3)(a) of the RFA, the Applicant must provide the following, as outlined at Section Four A.8.d.(3)(b) of the RFA:

(a) Information related to the proposed Development from the National Park Service's National Register of Historic Places:

(i) Eight-Digit Reference Number: _____

(ii) Resource Name: _____

(iii) Address: _____

(iv) Primary Certification Date: _____

(b) State the amount of qualified rehabilitation costs on which the Historic Tax Credit award is based: _____

e. Per Unit Construction Funding Preference:

Does the proposed Development qualify for the Per Unit Construction Funding Preference, as outlined at Section Four A.8.e. of the RFA?

Yes No

9. Applicant Certification and Acknowledgement:

a. The Applicant certifies that the proposed Development can be completed and operating within the development schedule and budget submitted to the Corporation.

b. The Applicant acknowledges and certifies that the following information will be provided by the due date outlined below, or as otherwise outlined in the invitation to enter credit underwriting. Failure to provide the required information by the stated deadline shall result in the withdrawal of the invitation to enter credit underwriting.

(1) Within 7 Calendar Days of the date of the invitation to enter credit underwriting:

(a) Identity of the remaining members of the Development Team (i.e., inexperienced co-Developer(s), Management Company, General Contractor, Architect, Attorney, Accountant, and, if applicable, Service Provider), as outlined in Item 12 of Exhibit C of the RFA. The team members so identified, and any future replacement thereof, must be acceptable to the Corporation and the Credit Underwriter;

(b) Name and address of the chief elected official of the local jurisdiction where the proposed Development is located;

(c) The unit mix for the proposed Development (number of bedrooms per unit, number of baths per unit, and number of units per bedroom type);

(d) The number of buildings with dwelling units; and

(e) Notification of the Applicant's eligibility for acquisition credits per Section 42 of the IRC, if applicable.

(2) Within 21 Calendar Days of the date of the invitation to enter credit underwriting:

(a) Certification of the status of site plan approval as of Application Deadline and certification that as of Application Deadline the site is appropriately zoned for the proposed Development, as outlined in Item 13 of Exhibit C of the RFA;

- (b) Certification confirming the availability of the following for the entire Development site, including confirmation that these items were in place as of the Application Deadline: electricity, water, sewer service, and roads for the proposed Development, as outlined in Item 13 of Exhibit C of the RFA;
- (c) Certification from a licensed environmental provider confirming that a Phase I environmental site assessment has been performed for the entire Development site, and, if applicable, a Phase II environmental site assessment has been performed, as outlined in Item 13 of Exhibit C of the RFA;
- (d) Selection of any construction features and amenities, as required in Item 4 of Exhibit C of the RFA;
- (e) Selection of resident programs, as required in Item 5 of Exhibit C of the RFA;
- (f) Confirmation that the proposed equity amount to be paid prior to or simultaneous with the closing of construction financing is at least 15 percent of the total proposed equity to be provided (the 15 percent criteria), subject to the following:
 - (i) If syndicating/selling the Housing Credits, there are two exceptions to the preceding sentence. First, if there is a bridge loan proposal within the equity proposal that provides for bridge loan proceeds that equal at least 15 percent of the amount of total proposed equity to be provided to be made available prior to or simultaneous with closing of construction financing, the 15 percent criteria will be met. Second, if there is a separate bridge loan proposal from either the equity provider, any entity that is controlled directly or indirectly by the equity provider, or a subsidiary of the equity provider's parent holding company, and the proposal explicitly proposes an amount to be made available prior to or simultaneous with the closing of construction financing that equals at least 15 percent of the total proposed equity to be paid stated in the equity proposal, the 15 percent criteria is met. Bridge loan proposals that are not within the equity proposal, though, must meet the criteria previously stated for debt financing with the exception that evidence of ability to fund does not have to be provided. The Applicant may include the proposed amount of the bridge loan as equity proceeds on the Construction or Rehabilitation Analysis and on the Permanent Analysis (Note: this 15 percent criteria must be reflected in the limited partnership agreement or limited liability company operating agreement); or
 - (ii) If not syndicating/selling the Housing Credits, proceeds from a bridge loan will not count toward meeting the 15 percent criteria;
- (g) All Applicants that apply as a Non-Profit (i.e., the Applicant's answer to question 2.c. of Exhibit A is "Yes"), must submit the following required materials to document its Non-Profit status: (i) a description/explanation of how the Non-Profit entity is substantially and materially participating in the management and operation of the Development (i.e., the role of the Non-Profit), (ii) the names and addresses of the members of the governing board of the Non-Profit entity, and (iii) the articles of incorporation demonstrating that one of the purposes of the Non-Profit entity is to foster low income housing;
- (h) Confirmation that all features and amenities committed to and proposed by the Applicant shall be located on the Development site;
- (i) Confirmation that, if the proposed Development meets the definition of Scattered Sites, all Scattered Sites requirements that were not required to be met in the Application will

be met, including that all features and amenities committed to and proposed by the Applicant that are not unit-specific shall be located on each of the Scattered Sites, or no more than 1/16 mile from the Scattered Site with the most units, or a combination of both; and

(j) Notification of the percentage of ownership of the Principals of the Applicant.

c. By submitting the Application, the Applicant acknowledges and certifies that:

- (1) The proposed Development will meet all state building codes, including the 2012 Florida Accessibility Code for Building Construction, adopted pursuant to Section 553.503, F.S., the Fair Housing Act as implemented by 24 CFR Part 100, Section 504 of the Rehabilitation Act of 1973 pursuant to Rule Chapter 67-48, F.A.C., and the Americans with Disabilities Act of 1990 as implemented by 28 CFR Part 35, incorporating the most recent amendments, regulations and rules;
- (2) If the Elderly Demographic Commitment is selected, the proposed Development must meet all of the Elderly Demographic requirements outlined in Items 1, 4, and 5 of Exhibit C of the RFA.

If the Person with a Disability Demographic Commitment is selected, the proposed Development must meet all of the Person with a Disability Demographic requirements outlined in Items 4 and 5 of Exhibit C of the RFA, as well as the resident eligibility for occupancy requirements of HUD Section 811;

- (3) The name of the Applicant entity stated in the Application may be changed only by written request of an Applicant to Corporation staff and approval of the Board after the Carryover Allocation Agreement is in effect. In addition, the Applicant entity shall be the recipient of the Housing Credits and may not change until after the Carryover Allocation Agreement is in effect, as further outlined in Item 2 of Exhibit C of the RFA;
- (4) If the Applicant applies as a Non-Profit entity (i.e., the Applicant's answer to question 2.c. of Exhibit A is "Yes") it must remain a Non-Profit entity and the Non-Profit entity must (i) receive at least 25 percent of the Developer's fee and (ii) understand that it is the Non-Profit entity's responsibility to contractually ensure that it substantially and materially participates in the management and operation of the Development throughout the Compliance Period;
- (5) The success of an Applicant in being selected for funding is not an indication that the Applicant will receive a positive recommendation from the Credit Underwriter or that the Development Team's experience, past performance or financial capacity is satisfactory. The past performance record, financial capacity, and any and all other matters relating to the Development Team, which consists of Developer, Management Company, General Contractor, Architect, Attorney, Accountant, and Service Provider (if the proposed Development is an Elderly Assisted Living Facility), will be reviewed during credit underwriting. The Credit Underwriter may require additional information from any member of the Development Team including, without limitation, documentation on other past projects and financials. Development Teams with an unsatisfactory past performance record, inadequate financial capacity or any other unsatisfactory matters relating to their suitability may result in a negative recommendation from the Credit Underwriter;
- (6) The Principals of each Developer identified in the Application, including all co-Developers, may be changed only by written request of an Applicant to Corporation staff and approval of

- the Board after the Applicant has been invited to enter credit underwriting. In addition, any allowable replacement of an experienced Principal of a Developer entity must meet the experience requirements that were met by the original Principal;
- (7) During credit underwriting, all funded Applications will be held to the number of RA units stated in the applicable letter provided by the Applicant as Attachment 5 to Exhibit A. This requirement will apply throughout the entire Compliance Period, subject to Congressional appropriation and continuation of the rental assistance program;
 - (8) The total number of units stated in the Application may be increased after the Applicant has been invited to enter credit underwriting, subject to written request of an Applicant to Corporation staff and approval of the Corporation;
 - (9) The invitation to enter credit underwriting will be rescinded if it is determined that the proposed Development was placed in service prior to the year in which it received its allocation;
 - (10) The proposed Development will include all required construction features and amenities applicable to the Demographic selected, as outlined in Item 4 of Exhibit C of the RFA. The quality of the features and amenities committed to by the Applicant is subject to approval of the Board of Directors;
 - (11) The proposed Development will include all required resident programs applicable to the Demographic selected, as outlined in Item 5 of Exhibit C of the RFA. The quality of the resident programs committed to by the Applicant is subject to approval of the Board of Directors;
 - (12) The proposed Development will include the required set-aside units (for ELI Households and Total Set-Aside Percentage). The Total Set-Aside Percentage stated in the Application may be increased after the Applicant has been invited to enter credit underwriting, subject to written request of an Applicant to Corporation staff and approval of the Corporation. Commitments to set aside residential units made by those Applicants that receive funding will become the minimum set-aside requirements for any other Corporation funds that the Applicant may receive in the future for the same Development;
 - (13) The Applicant irrevocably commits to set aside units in the proposed Development for a total of 50 years. Note: in submitting its Application, the Applicant knowingly, voluntarily and irrevocably commits to waive, and does hereby waive, for the duration of the 50-year set aside period the option to convert to market, including any option or right to submit a request for a qualified contract, after year fourteen (14), and any other option, right or process available to the Applicant to terminate (or that would result in the termination of) the 50-year set aside period at any time prior to the expiration of its full term;
 - (14) The Applicant's commitments will be included in the Extended Use Agreement and must be maintained in order for the Development to remain in compliance, unless the Board approves a change;
 - (15) The applicable fees outlined in Item 11 of Exhibit C of the RFA will be due as outlined in this RFA, Rule Chapter 67-48, F.A.C., and/or as otherwise prescribed by the Corporation and/or the Credit Underwriter;

- (16) The Applicant agrees and acknowledges that the Application will be subject to the Total Development Cost Per Unit Limitation during the scoring, credit underwriting, and final allocation process, as outlined in Item 8 of Exhibit C of the RFA;
- (17) If the Applicant indicates that the proposed Development will be assisted with RD funding, the Applicant acknowledges that the property is currently in the USDA RD loan portfolio and will remain in the USDA RD loan portfolio. In addition, if the Applicant indicated that the proposed Development will be assisted with funding under the RD 538 Program and expects to use such funding as a source of financing, the Section 538 Selection letter sent to the Applicant by RD must be provided to the Credit Underwriter;
- (18) If applicable, the Applicant will develop and execute the required Memorandum of Understanding with a designated Special Needs Household Referral Agency by the deadline established in the Carryover Allocation Agreement, as outlined in Section Four A.6.b.(2)(b) of the RFA; and
- (19) If applicable, the additional information regarding Historic Tax Credits will be provided by the Applicant as outlined in Section Four A.8.d.(3) of the RFA.
- d. The Applicant acknowledges that any funding preliminarily secured by the Applicant is expressly conditioned upon any independent review, analysis and verification of all information contained in this Application that may be conducted by the Corporation, the successful completion of credit underwriting, and all necessary approvals by the Board of Directors, Corporation or other legal counsel, the Credit Underwriter, and Corporation Staff.
- e. If preliminary funding is approved, the Applicant will promptly furnish such other supporting information, documents, and fees as may be requested or required. The Applicant understands and agrees that the Corporation is not responsible for actions taken by the undersigned in reliance on a preliminary commitment by the Corporation. The Applicant commits that no qualified residents will be refused occupancy because they have Section 8 vouchers or certificates. The Applicant further commits to actively seek tenants from public housing waiting lists and tenants who are participating in and/or have successfully completed the training provided by welfare to work or self-sufficiency type programs.
- f. By Certificate of Occupancy, the Applicant commits to participate in the statewide housing locator system, as required by the Corporation.
- g. The Applicant and all Financial Beneficiaries have read all applicable Corporation rules governing this RFA and have read the instructions for completing this RFA and will abide by the applicable Florida Statutes and the credit underwriting and program provisions outlined in Rule Chapter 67-48, F.A.C. The Applicant and all Financial Beneficiaries have read, understand and will comply with Section 42 of the Internal Revenue Code, as amended, and all related federal regulations.
- h. In eliciting information from third parties required by and/or included in this Application, the Applicant has provided such parties information that accurately describes the Development as proposed in this Application. The Applicant has reviewed the third party information included in this Application and/or provided during the credit underwriting process and the information provided by any such party is based upon, and accurate with respect to, the Development as proposed in this Application.

- i. The undersigned understands and agrees that in the event that the Applicant is invited into credit underwriting, the Applicant must submit IRS Forms 8821 for all Financial Beneficiaries in order to obtain a recommendation for a Housing Credit Allocation.
- j. The undersigned is authorized to bind all Financial Beneficiaries to this certification and warranty of truthfulness and completeness of the Application.

Under the penalties of perjury, I declare and certify that I have read the foregoing and that the information is true, correct and complete.

Signature of Applicant	Name (typed or printed)
Title (typed or printed)	

Addenda

The Applicant may use the space below to provide any additional information or explanatory addendum for items in the Application. Please specify the particular Item to which the additional information or explanatory addendum applies.

- NOTES:
- (1) Developer fee may not exceed the limits established in Rule Chapter 67-48, F.A.C. Any portion of the fee that has been deferred must be included in Total Development Cost.
 - (2) If Housing Credit equity is being used as a source of financing, complete Columns 1 and 2. Otherwise, only complete Column 2.
 - (3) General Contractor's fee is limited to 14% of actual construction cost (A.1.1. Column 3). The General Contractor's fee must be disclosed. The General Contractor's fee includes General Conditions, Overhead, and Profit.
 - (4) In reference to impact fees, a tax professional's advice should be sought regarding eligibility of these fees.
 - (5) Except as otherwise provided in Rule Chapter 67-48, F.A.C., the maximum hard and soft cost contingencies (Contingency Reserves) allowed cannot exceed (i) 5% for Development Categories of New Construction or Redevelopment, with or without Acquisition or (ii) 15% for Development Categories of Rehabilitation or Preservation, with or without Acquisition. The determination of the Contingency Reserve is limited to the maximum stated percentage of the combined total of A1.3. TOTAL ACTUAL CONSTRUCTION COSTS and A2. TOTAL GENERAL DEVELOPMENT COST. Operating Deficit Reserves (ODR) are not to be included in C. DEVELOPMENT COST and cannot be used in determining the maximum Developer fee. Operating Deficit Reserves or any other reserves other than the Contingency Reserves provided herein are not permitted in the Application. An Operating Deficit Reserve, if necessary, will be reviewed and sized in credit underwriting.
 - (6) Applicants using HC equity funding should list an estimated compliance fee amount in column 2.
 - (7) Although the Corporation acknowledges that the costs listed on the Development Cost Pro Forma, Detail/Explanation Sheet, Construction or Rehab Analysis and Permanent Analysis are subject to change during credit underwriting, such costs are subject to the Total Development Cost Per Unit Limitation as provided in the RFA as well as the other cost limitations provided in Rule Chapter 67-48, F.A.C., as applicable.

USE THE DETAIL/EXPLANATION SHEET FOR EXPLANATION OF * ITEMS. IF ADDITIONAL SPACE IS REQUIRED, ENTER THE INFORMATION ON THE ADDENDA LOCATED AT THE END OF THE APPLICATION.

	1 HC ELIGIBLE (HC ONLY)	2 HC INELIGIBLE	3 TOTAL
DEVELOPMENT COSTS			
<i>Actual Construction Costs</i>			
Accessory Buildings	_____	_____	_____
Demolition	_____	_____	_____
New Rental Units	_____	_____	_____
*Off-Site Work (explain in detail)	_____	_____	_____
Recreational Amenities	_____	_____	_____
Rehab of Existing Common Areas	_____	_____	_____
Rehab of Existing Rental Units	_____	_____	_____
Site Work	_____	_____	_____
*Other (explain in detail)	_____	_____	_____
A1.1. Actual Construction Cost	\$ _____	\$ _____	\$ _____
A1.2. General Contractor Fee <small>See Note (3)</small> (Max. 14% of A1.1., column 3)	\$ _____	\$ _____	\$ _____
A1.3. TOTAL ACTUAL CONSTRUCTION COSTS	\$ _____	\$ _____	\$ _____
<i>General Development Costs</i>			
Accounting Fees	_____	_____	_____
Appraisal	_____	_____	_____

RFA 2014-104 DEVELOPMENT COST PRO FORMA

	1 HC ELIGIBLE (HC ONLY)	2 HC INELIGIBLE	3 TOTAL
<i>General Development Costs (Cont'd)</i>			
Architect's Fee - Site/Building Design	_____	_____	_____
Architect's Fee - Supervision	_____	_____	_____
Builder's Risk Insurance	_____	_____	_____
Building Permit	_____	_____	_____
Brokerage Fees - Land/Buildings	██████████	_____	_____
Capital Needs Assessment	_____	_____	_____
Engineering Fees	_____	_____	_____
Environmental Report	_____	_____	_____
FHFC Administrative Fee	██████████	_____	_____
FHFC Application Fee	██████████	_____	_____
FHFC Compliance Fee ^{See Note (6)}	██████████	_____	_____
FHFC Credit Underwriting Fees	_____	_____	_____
Green Building Certification/ HERS Inspection Costs	_____	_____	_____
*Impact Fees (list in detail)	_____	_____	_____
Inspection Fees	_____	_____	_____
Insurance	_____	_____	_____
Legal Fees	_____	_____	_____
Market Study	_____	_____	_____
Marketing/Advertising	██████████	_____	_____
Property Taxes	_____	_____	_____
Soil Test Report	_____	_____	_____
Survey	_____	_____	_____
Title Insurance & Recording Fees	_____	_____	_____
Utility Connection Fee	_____	_____	_____
*Other (explain in detail)	_____	_____	_____
A2. TOTAL GENERAL DEVELOPMENT COST	\$ _____	\$ _____	\$ _____

RFA 2014-104 DEVELOPMENT COST PRO FORMA

	1 HC ELIGIBLE (HC ONLY)	2 HC INELIGIBLE	3 TOTAL
<i>Financial Costs</i>			
Construction Loan Origination/ Commitment Fee(s)	_____	_____	_____
Construction Loan Credit Enhancement Fee(s)	_____	_____	_____
Construction Loan Interest	_____	_____	_____
Permanent Loan Origination/ Commitment Fee(s)	██████████	_____	_____
Permanent Loan Credit Enhancement Fee(s)	██████████	_____	_____
Permanent Loan Closing Costs	██████████	_____	_____
Bridge Loan Origination/ Commitment Fee(s)	_____	_____	_____
Bridge Loan Interest	_____	_____	_____
Non-Permanent Loan(s) Closing Costs	_____	_____	_____
*Other (explain in detail)	_____	_____	_____
A3. TOTAL FINANCIAL COSTS	\$ _____	\$ _____	\$ _____
B1. CONTINGENCY RESERVES <small>See Note (5)</small>	\$ _____	\$ _____	\$ _____
B2. ACQUISITION COST OF EXISTING DEVELOPMENTS (EXCLUDING LAND) Existing Buildings	\$ _____	\$ _____	\$ _____
B3. *Other (explain in detail)	\$ _____	\$ _____	\$ _____
C. DEVELOPMENT COST (A1.3+A2+A3+B1+B2+B3)	\$ _____	\$ _____	\$ _____
D. DEVELOPER'S FEE <small>See Note (1)</small>	\$ _____	\$ _____	\$ _____
E. OPERATING DEFICIT RESERVES <small>See Note (5)</small>	██████████	██████████	██████████
F. TOTAL LAND COST	██████████	\$ _____	\$ _____
G. TOTAL DEVELOPMENT COST (C+D+E+F)	\$ _____	\$ _____	\$ _____

Detail/Explanation Sheet

Totals must agree with Pro Forma. Provide description and amount for each item that has been completed on the Pro Forma.

DEVELOPMENT COSTS

Actual Construction Cost

(as listed at Item A1.)

Off-Site Work: _____

Other: _____

General Development Costs

(as listed at Item A2.)

Impact Fees: _____

Other: _____

Financial Costs

(as listed at Item A3.)

Other: _____

Acquisition Cost of Existing Developments

(as listed at Item B2.)

Other: _____

NOTE: Neither brokerage fees nor syndication fees can be included in eligible basis. Consulting fees, if any, and any financial or other guarantees required for the financing must be paid out of the Developer fee. Consulting fees include, but are not limited to, payments for Application consultants, construction management or supervision consultants, or local government consultants.

CONSTRUCTION or REHAB ANALYSIS

AMOUNT

LOCATION OF DOCUMENTATION

A. Total Development Costs \$

B. Construction or Rehab Funding Sources:

- 1. HC Equity Proceeds Paid Prior to Completion of Construction which is Prior to Receipt of Final Certificate of Occupancy or in the case of Rehabilitation, prior to placed-in service date as determined by the Applicant. \$ Attachment
- 2. First Mortgage Financing \$ Attachment
- 3. Second Mortgage Financing \$ Attachment
- 4. Third Mortgage Financing \$ Attachment
- 5. Grants \$ Attachment
- 6. HC Equity - Partner's Contribution \$ Attachment
- 7. HC Equity Bridge Loan \$ Attachment
- 8. USDA RD Financing:
 - a. RD 515 \$ Attachment
 - b. RD 538 \$ Attachment
- 9. Historic Tax Credit Equity Proceeds Paid Prior to Completion of Construction which is prior to placed-in service date as determined by the Applicant. \$ Attachment
- 10. Other: \$ Attachment
- 11. Other: \$ Attachment
- 12. Deferred Developer Fee \$
- 13. Total Sources \$

C. Construction or Rehab Funding Shortfall (A. - B.13.): \$

(A positive number here represents a funding shortfall. A value of zero or a negative value here is needed.)

Each Attachment must be listed behind its own Tab. DO NOT INCLUDE ALL ATTACHMENTS BEHIND ONE TAB.

PERMANENT ANALYSIS

	AMOUNT	LOCATION OF DOCUMENTATION
A. Total Development Costs	\$ _____	
B. Permanent Funding Sources:		
1. HC Syndication/HC Equity Proceeds	\$ _____	Attachment _____
2. First Mortgage Financing	\$ _____	Attachment _____
3. Second Mortgage Financing	\$ _____	Attachment _____
4. Third Mortgage Financing	\$ _____	Attachment _____
5. Grants	\$ _____	Attachment _____
6. HC Equity - Partner's Contribution	\$ _____	Attachment _____
7. USDA RD Financing:		
a. RD 515	\$ _____	Attachment _____
b. RD 538	\$ _____	Attachment _____
8. Historic Tax Credit Syndication/ Equity Proceeds	\$ _____	Attachment _____
9. Other: _____	_____	Attachment _____
10. Other: _____	_____	Attachment _____
11. Deferred Developer Fee	\$ _____	
12. Total Sources	\$ _____	
C. Permanent Funding Shortfall (A. - B.12.):	\$ _____	

(A positive number here represents a funding shortfall. A value of zero or a negative value here is needed.)

Each Attachment must be listed behind its own Tab. DO NOT INCLUDE ALL ATTACHMENTS BEHIND ONE TAB.

Exhibit B to RFA 2014-104 - Preservation of Existing Affordable Housing Developments

To be considered for any points for Proximity to Services and to determine whether the Mandatory Distance Requirement has been met (if not eligible for automatic qualification), as outlined in Section Four A.5. of the RFA, the Applicant must provide the following Surveyor Certification form (Form Rev. 01-14). This form is also available in interactive PDF format by clicking [here](#). For purposes of this requirement, the Applicant may utilize the applicable 2013 Surveyor Certification form, provided the information entered on the form(s) complies with the requirements of this RFA. Any option selected on a 2013 certification and verification form that is not a part of this RFA will not be considered.

SURVEYOR CERTIFICATION FORM

Name of Development: _____

Development Location: _____

(At a minimum, provide the address number, street name and city, and/or provide the street name, closest designated intersection and either the city (if located within a city) or county (if located in the unincorporated area of the county). If the Development consists of Scattered Sites, the Development Location stated above must reflect the Scattered Site¹ where the Development Location Point is located.)

The undersigned Florida licensed surveyor confirms that the method used to determine the following latitude and longitude coordinates conforms to Rule 5J-17, F.A.C., formerly 61G17-6, F.A.C.:

**All calculations shall be based on "WGS 84" and be grid distances. The horizontal positions shall be collected to meet sub-meter accuracy (no autonomous hand-held GPS units shall be used).*

State the Development Location Point.²	N _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)	W _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)
--	--------------------	---------------	--	--------------------	---------------	--

To be eligible for proximity points, Degrees and Minutes must be stated as whole numbers and Seconds must be truncated after 1 decimal place.

Transit Service – State the latitude and longitude coordinates for one (1) Transit Service on the chart below.³

	Latitude			Longitude		
Public Bus Stop	N _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)	W _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)
Public Bus Transfer Stop	N _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)	W _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)
Public Bus Rapid Transit Stop	N _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)	W _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)
SunRail Station, MetroRail Station, or TriRail Station	N _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)	W _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)
Using the method described above*, the distance (rounded up to the nearest hundredth of a mile) between the coordinates of the Development Location Point and the coordinates of the Transit Service is:						_____ Miles

Community Services - State the Name, Address and latitude and longitude coordinates of the closest service(s) on the chart below.³

Grocery Store:	Latitude			Longitude		
Name - _____ Address - _____ _____	N _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)	W _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)
Using the method described above*, the distance (rounded up to the nearest hundredth of a mile) between the coordinates of the Development Location Point and the coordinates of the Grocery Store is:						_____ Miles

(Form Rev. 01-14)

Initials of Surveyor _____

SURVEYOR CERTIFICATION FORM

Medical Facility:	Latitude			Longitude		
Name - _____ Address - _____ _____	N _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)	W _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)
Using the method described above*, the distance (rounded up to the nearest hundredth of a mile) between the coordinates of the Development Location Point and the coordinates of the Medical Facility is:					_____ Miles	
Pharmacy:	Latitude			Longitude		
Name - _____ Address - _____ _____	N _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)	W _____ Degrees	_____ Minutes	_____ Seconds (truncated after 1 decimal place)
Using the method described above*, the distance (rounded up to the nearest hundredth of a mile) between the coordinates of the Development Location Point and the coordinates of the Pharmacy is:					_____ Miles	

If the Corporation discovers that there are any false statements made in this certification, the Corporation will forward a copy to the State of Florida Department of Business and Professional Regulation for investigation.

CERTIFICATION – Under penalties of perjury, I declare that the foregoing statement is true and correct.

Signature of Florida Licensed Surveyor

Florida License Number of Signatory

Print or Type Name of Signatory

Please note: This form may be modified by Florida Housing Finance Corporation per Section 67-60.005, F.A.C.

This certification consists of 3 pages. This certification may not be signed by the Applicant, by any related parties of the Applicant, or by any Principals or Financial Beneficiaries of the Applicant. If the certification is inappropriately signed, the Application will not be eligible to receive proximity points. If this certification contains corrections or 'white-out', or if it is altered or retyped, the form will not be considered. The certification may be photocopied. To be considered for scoring purposes, at least pages 1 and 2 of this 3 page certification form must be provided by the Applicant.

¹“Scattered Sites,” as applied to a single Development, means a Development site that, when taken as a whole, is comprised of real property that is not contiguous (each such non-contiguous site within a Scattered Site Development, a “Scattered Site”). For purposes of this definition “contiguous” means touching at a point or along a boundary. Real property is contiguous if the only intervening real property interest is an easement provided the easement is not a roadway or street. (See Rule 67-48.002, F.A.C.).

²“Development Location Point” means a single point selected by the Applicant on the proposed Development site that is located within 100 feet of a residential building existing or to be constructed as part of the proposed Development. For a Development which consists of Scattered Sites, this means a single point on the site with the most units that is located within 100 feet of a residential building existing or to be constructed as part of the proposed Development (See Rule 67-48.002, F.A.C.).

³The latitude and longitude coordinates for all Proximity Services must represent a point as outlined on the Coordinates Location Chart set out below. The coordinates for each service must be stated in degrees, minutes and seconds, with the degrees and minutes stated as whole numbers and the seconds truncated after one decimal place. If the degrees and minutes are not stated as whole numbers and the seconds are not truncated after one decimal place, the Applicant will not be eligible for proximity points for that service.

(Form Rev. 01-14)

SURVEYOR CERTIFICATION FORM

Coordinates Location Chart																											
Service	Location where latitude and longitude coordinates must be obtained																										
Community Services	Coordinates must represent a point that is on the doorway threshold of an exterior entrance that provides direct public access to the building where the service is located.																										
Transit Services	<p>For Public Bus Stop, Public Bus Rapid Transit Stop, Public Bus Transfer Stop, TriRail Rail Stations and MetroRail Rail Stations, coordinates must represent the location where passengers may embark and disembark the bus or train.</p> <p>For SunRail Rail Stations, coordinates must represent either the location where passengers may embark and disembark the train or the coordinates listed below:</p> <table border="0"> <thead> <tr> <th>Station Name</th> <th>Latitude/Longitude Coordinates</th> </tr> </thead> <tbody> <tr> <td>Altamonte Springs Station</td> <td>N 28 39 50.1, W 81 21 23.4</td> </tr> <tr> <td>Church Street Station</td> <td>N 28 32 20.3, W 81 22 50.6</td> </tr> <tr> <td>DeBary Station</td> <td>N 28 51 20.3, W 81 19 24.1</td> </tr> <tr> <td>Florida Hospital Station</td> <td>N 28 34 21.8, W 81 22 17.4</td> </tr> <tr> <td>Lake Mary Station</td> <td>N28 45 31.8, W 81 19 04.3</td> </tr> <tr> <td>LYNX Central Station</td> <td>N 28 32 52.2, W 81 22 51.0</td> </tr> <tr> <td>Longwood Station</td> <td>N 28 42 04.1, W 81 20 43.4</td> </tr> <tr> <td>Maitland Station</td> <td>N 28 38 03.7, W 81 21 44.7</td> </tr> <tr> <td>Orlando Amtrak/ORMC Station</td> <td>N 28 31 39.5, W 81 22 55.6</td> </tr> <tr> <td>Sand Lake Road Station</td> <td>N 28 27 11.3, W 81 22 1.0</td> </tr> <tr> <td>Sanford/SR46 Station</td> <td>N 28 48 49.8, W 81 17 56.9</td> </tr> <tr> <td>Winter Park/Park Ave Station</td> <td>N 28 35 51.5, W 81 21 6.0</td> </tr> </tbody> </table>	Station Name	Latitude/Longitude Coordinates	Altamonte Springs Station	N 28 39 50.1, W 81 21 23.4	Church Street Station	N 28 32 20.3, W 81 22 50.6	DeBary Station	N 28 51 20.3, W 81 19 24.1	Florida Hospital Station	N 28 34 21.8, W 81 22 17.4	Lake Mary Station	N28 45 31.8, W 81 19 04.3	LYNX Central Station	N 28 32 52.2, W 81 22 51.0	Longwood Station	N 28 42 04.1, W 81 20 43.4	Maitland Station	N 28 38 03.7, W 81 21 44.7	Orlando Amtrak/ORMC Station	N 28 31 39.5, W 81 22 55.6	Sand Lake Road Station	N 28 27 11.3, W 81 22 1.0	Sanford/SR46 Station	N 28 48 49.8, W 81 17 56.9	Winter Park/Park Ave Station	N 28 35 51.5, W 81 21 6.0
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If there is no exterior public entrance to the Community Service, then a point should be used that is at the exterior entrance doorway threshold that is the closest walking distance to the doorway threshold of the interior public entrance to the service. For example, for a Pharmacy located within an enclosed shopping mall structure that does not have a direct public exterior entrance, the latitude and longitude coordinates at the doorway threshold of the exterior public entrance to the enclosed shopping mall that provide the shortest walking distance to the doorway threshold of the interior entrance to the Pharmacy would be used.

Applicants may use the same latitude and longitude coordinates for the Grocery Store, Medical Facility and/or Pharmacy if the Grocery Store, Medical Facility and/or Pharmacy is housed at the same location.

Exhibit C to RFA 2014-104 - Preservation of Existing Affordable Housing Developments

1. Elderly Demographic Commitment Requirements:

In order for a proposed Development to qualify for the Elderly Demographic, the following applicable requirement must be met:

- (a) If the Elderly non-ALF Demographic Commitment is selected at question 1 of Exhibit A, at least 50 percent of the total units must be comprised of one-bedroom or less (i.e., one-bedroom units or efficiency/ studio/zero bedroom units or a combination these types of units), and no more than 15 percent of the total units can be larger than 2 bedroom units.
- (b) If the Elderly ALF Demographic Commitment is selected at question 1 of Exhibit A, at least 90 percent of the total units must be comprised of units no larger than one-bedroom and the sharing of a unit by two or more unaffiliated residents cannot be a condition of occupancy.

2. Applicant Requirements:

The Applicant entity shall be the recipient of the Housing Credits and may not change until after the Carryover Allocation Agreement is in effect. Once the Carryover Allocation Agreement has been executed by all parties, replacement of the Applicant or a material change (33.3 percent or more of the Applicant, a General Partner of the Applicant, or a member of the Applicant) in the ownership structure of the named Applicant will require Board approval prior to the change. Any non-material change (less than 33.3 percent of the Applicant, a General Partner of the Applicant, or a member of the Applicant) in the ownership structure of the named Applicant will not require Board approval, but the Corporation must still be notified in writing of the change. The Applicant entity may be changed without Board approval after a Final Housing Credit Allocation Agreement has been approved and the IRS Forms 8609 have been issued; however, the Corporation must still be notified in writing of the change. Changes to the Applicant entity prior to the execution of a Carryover Allocation Agreement or without Board approval prior to the approval of the Final Housing Credit Allocation Agreement and issuance of the IRS Forms 8609 will result in a disqualification from receiving funding and shall be deemed a material misrepresentation. Changes to the limited partner of a limited partnership or member of a limited liability company owning the syndicating interest therein will not result in disqualification.

3. Principal Disclosures for Applicants and Each Developer

The Corporation is providing the following charts and examples to assist the Applicant in providing the required list identifying the Principals for the Applicant and for each Developer. The term Principals is defined in Section 67-48.002, F.A.C.

a. Charts:

(1) For the Applicant:

(a) If the Applicant is a Limited Partnership:

Identify All General Partners	and	Identify All Limited Partners
-------------------------------	-----	-------------------------------

and

For each General Partner that is a Limited Partnership:	For each General Partner that is a Limited Liability Company:	For each General Partner that is a Corporation:
Identify each General Partner	Identify each Manager	Identify each Officer
and	and	and
Identify each Limited Partner	Identify each Member	Identify each Director
		and
		Identify each Shareholder

and

For each Limited Partner that is a Limited Partnership:	For each Limited Partner that is a Limited Liability Company:	For each Limited Partner that is a Corporation:
Identify each General Partner	Identify each Manager	Identify each Officer
and	and	and
Identify each Limited Partner	Identify each Member	Identify each Director
		and
		Identify each Shareholder

For any General Partner and/or Limited Partner that is a natural person (i.e., Samuel S. Smith), no further disclosure is required.

(b) If the Applicant is a Limited Liability Company:

Identify All Managers	and	Identify All Members
-----------------------	-----	----------------------

and

For each Manager that is a Limited Partnership:	For each Manager that is a Limited Liability Company:	For each Manager that is a Corporation:
Identify each General Partner	Identify each Manager	Identify each Officer
and	and	and
Identify each Limited Partner	Identify each Member	Identify each Director
		and
		Identify each Shareholder

and

For each Member that is a Limited Partnership:	For each Member that is a Limited Liability Company:	For each Member that is a Corporation:
Identify each General Partner	Identify each Manager	Identify each Officer
and	and	and
Identify each Limited Partner	Identify each Member	Identify each Director
		and
		Identify each Shareholder

For any Manager and/or Member that is a natural person (i.e., Samuel S. Smith), no further disclosure is required.

(c) If the Applicant is a Corporation:

Identify All Officers	and	Identify All Directors	and	Identify All Shareholders
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and

For each Shareholder that is a Limited Partnership:	for each Shareholder that is a Limited Liability Company:	For each Shareholder that is a Corporation:
Identify each General Partner	Identify each Manager	Identify each Officer
and	and	and

Identify each Limited Partner		Identify each Member		Identify each Director
				and
				Identify each Shareholder

For any Officer and/or Director and/or Shareholder that is a natural person (i.e., Samuel S. Smith), no further disclosure is required.

(2) For Each Developer:

(a) If the Developer is a Limited Partnership:

Identify All General Partners		and		Identify All Limited Partners
-------------------------------	--	-----	--	-------------------------------

and

For each General Partner that is a Limited Partnership:		For each General Partner that is a Limited Liability Company:		For each General Partner that is a Corporation:
Identify each General Partner		Identify each Manager		Identify each Officer
and		and		and
Identify each Limited Partner		Identify each Member		Identify each Director
				and
				Identify each Shareholder

and

For each Limited Partner that is a Limited Partnership:		For each Limited Partner that is a Limited Liability Company:		For each Limited Partner that is a Corporation:
Identify each General Partner		Identify each Manager		Identify each Officer
and		and		and
Identify each Limited Partner		Identify each Member		Identify each Director
				and
				Identify each Shareholder

For any General Partner and/or Limited Partner that is a natural person (i.e., Samuel S. Smith), no further disclosure is required.

(b) If the Developer is a Limited Liability Company:

Identify All Managers		and		Identify All Members
-----------------------	--	-----	--	----------------------

and

For each Manager that is a Limited Partnership:		For each Manager that is a Limited Liability Company:		For each Manager that is a Corporation:
Identify each General Partner		Identify each Manager		Identify each Officer
and		and		and
Identify each Limited Partner		Identify each Member		Identify each Director
				and
				Identify each Shareholder

and

For each Member that is a Limited Partnership:		For each Member that is a Limited Liability Company:		For each Member that is a Corporation:
Identify each General Partner		Identify each Manager		Identify each Officer
and		and		and
Identify each Limited Partner		Identify each Member		Identify each Director
				and
				Identify each Shareholder

For any Manager and/or Member that is a natural person (i.e., Samuel S. Smith), no further disclosure is required.

(c) If the Developer is a Corporation:

Identify All Officers	and	Identify All Directors	and	Identify All Shareholders
-----------------------	-----	------------------------	-----	---------------------------

and

For each Shareholder that is a Limited Partnership:		for each Shareholder that is a Limited Liability Company:		For each Shareholder that is a Corporation:
Identify each General Partner		Identify each Manager		Identify each Officer
and		and		and
Identify each Limited Partner		Identify each Member		Identify each Director
				and
				Identify each Shareholder

For any Officer and/or Director and/or Shareholder that is a natural person (i.e., Samuel S. Smith), no further disclosure is required.

b. Examples:

➤ Example No. 1:

Applicant or Developer: Acme Properties, LLC

Sole Member/Manager: ABC, LLC

Manager: Amy Smith

Sole Member: Patty Jones

➤ Example No. 2:

Applicant or Developer: Acme Builders, LLC

Manager: Acme Management Co, Inc.

Officers: Peter Smith, President/CEO
Fred Jones, Vice President
Patty Jones, Vice President
Bob Brown, Secretary
Amy Smith, Treasurer

Directors: Peter Smith
Fred Jones
Patty Jones

Shareholders: Fred Jones
Patty Jones
Bob Brown
Amy Smith

Member: Adam Jones

Member: Amy Smith

➤ Example No. 3:

Applicant or Developer: Acme Properties, Ltd.

Managing General Partner: ABC, Ltd.
General Partner: XYZ, Inc.
Limited Partner: Fred Jones

Co-General Partner: Acme Homes 3, LLC
Sole Manager/Member: Peter Smith

Co-General Partner: ABC, LLC
Manager: Adam Jones
Manager: Peter Smith
Member: XYZ, LLC
Member: Adam Jones
Member: Peter Smith

Limited Partner: Acme Homes Contractors, Inc.
Officers: Fred Jones, President
Bob Brown, Vice President
Patty Jones, Secretary/
Treasurer
Directors: Fred Jones
Bob Brown
Patty Jones
Shareholders: Fred Jones
Bob Brown
Peter Smith
Patty Jones
Adam Jones

4. Required Construction Features and Amenities:

a. All Applicants will be required to provide the following General Features and Accessibility, Universal Design and Visitability Features:

(1) The following General Features must be provided for all proposed Developments:

- Termite prevention;
- Pest control;
- Window covering for each window and glass door inside each unit;
- Cable or satellite TV hook-up in each unit and, if the Development offers cable or satellite TV service to the residents, the price cannot exceed the market rate for service of similar quality available to the Development's residents from a primary provider of cable or satellite TV; and
- Number of full bathrooms in each unit of the proposed Development must be equal to or greater than the number of existing full bathrooms.

(2) Accessibility, Universal Design and Visitability Features:

(a) All units of the proposed Development must meet all federal requirements and state building code requirements, including the following:

- 2012 Florida Accessibility Code for Building Construction as adopted pursuant to Section 553.503, Florida Statutes;
- The Fair Housing Act as implemented by 24 CFR 100;
- Section 504 of the Rehabilitation Act of 1973; and
- Titles II and III of the Americans with Disabilities Act of 1990 as implemented by 28 CFR 35, incorporating the most recent amendments, regulations and rules.

For purposes of the Housing Credit Program, a Housing Credit allocation shall be deemed “Federal financial assistance” within the meaning of that term as used in Section 504 of the Rehabilitation Act of 1973 as implemented by 24 CFR Part 8 for all Housing Credit Developments.

(b) All new construction units that are located on an accessible route must have the following features and all rehabilitation units that are located on an accessible route must include as many of the following features as are structurally and financially feasible within the scope of the rehabilitation work utilizing a capital needs assessment performed during the credit underwriting process. However, proposed Developments that primarily serve persons with physical disabilities must include all required accessibility, adaptability, universal design and visitability features listed below. Applicants must include the costs of the features listed below that are planned for the Development in the Development Cost Pro Forma submitted with the Application. If a construction feature is being altered within the scope of the Rehabilitation work, then the feature must meet the requirements of the list below:

- Primary entrance door shall have a threshold with no more than a ½-inch rise;
- All door handles on primary entrance door and interior doors must have lever handles;
- Lever handles on all bathroom faucets and kitchen sink faucets;
- Mid-point on light switches and thermostats shall not be more than 48 inches above finished floor level; and
- Cabinet drawer handles and cabinet door handles in bathroom and kitchen shall be lever or D-pull type that operate easily using a single closed fist.

b. All new construction units must include the following General Features and Green Building Features:

(1) General Features in all Family Demographic Developments:

- Full-size range and oven in all units; and
- Provide reinforced walls for future installation of grab bars that meet or exceed 2010 ADA Standards for Accessible Design around each tub/shower unit in each dwelling unit. At the request of and at no charge to a resident household, the Development shall purchase and install grab bars around each tub/shower unit in the dwelling unit. The product specifications and installation must meet or exceed 2010 ADA Standards for Accessible Design. The Development shall inform a prospective resident that the Development, upon a resident household’s request and at no charge to the household, will install grab bars around a dwelling unit’s tub/shower unit, pursuant to the 2010 ADA Standards. At a minimum, the Development shall inform each prospective lessee by

including language in the Development's written materials listing and describing the unit's features, as well as including the language in each household's lease.

(2) Green Building Features in all Family, Elderly, and Person with a Disability Demographic Developments:

- Low or No-VOC paint for all interior walls (Low-VOC means 50 grams per liter or less for flat; 150 grams per liter or less for non-flat paint);
- Low-flow water fixtures in bathrooms—WaterSense labeled products or the following specifications:
 - Toilets: 1.6 gallons/flush or less,
 - Faucets: 1.5 gallons/minute or less,
 - Showerheads: 2.2 gallons/minute or less;
- Energy Star qualified refrigerator;
- Energy Star qualified dishwasher;
- Water heating minimum efficiency specifications (choose gas, electric, gas tankless, or boiler/hot water maker):
 - Gas:
 - 30 gal = .63 EF; or
 - 40 gal = .61 EF; or
 - 50 gal = .59 EF; or
 - 60 gal = .57 EF; or
 - 70 gal = .55 EF; or
 - 80 gal = .53 EF; or
 - Electric:
 - 30 gal = .94 EF; or
 - 40 gal = .93 EF; or
 - 50 gal = .92 EF; or
 - 60 gal = .91 EF; or
 - 70 gal = .90 EF; or
 - 80 gal = .89 EF; or
 - Tankless gas water heater: minimum .80 EF; or
 - Boiler or hot water maker:
 - < 300,000 Btu/h: 85% Et (thermal efficiency); or
 - 300,000 Btu/h or higher: 80% Et;
- Energy Star qualified ceiling fans with lighting fixtures in bedrooms; and
- Air Conditioning minimum efficiency specifications (choose in-unit or commercial):
 - In-unit air conditioning: minimum 14 SEER; or
 - Central chiller AC system—based on size:
 - 0-65 KBtuh: Energy Star certified; or
 - >65-135 KBtuh: 11.3 EER/11.5 IPLV; or
 - >135-240 KBtuh: 11.0 EER/11.5 IPLV; or
 - >240 KBtuh: 10.6 EER/11.2 IPLV.

c. All rehabilitation units must include the following General Features, Required Green Building Features and Additional Green Building Features:

(1) General Features in all Family Demographic Developments:

- Full-size range and oven in all units; and

- Provide reinforced walls for future installation of grab bars that meet or exceed 2010 ADA Standards for Accessible Design around each tub/shower unit in each dwelling unit. At the request of and at no charge to a resident household, the Development shall purchase and install grab bars around each tub/shower unit in the dwelling unit. The product specifications and installation must meet or exceed 2010 ADA Standards for Accessible Design. The Development shall inform a prospective resident that the Development, upon a resident household's request and at no charge to the household, will install grab bars around a dwelling unit's tub/shower unit, pursuant to the 2010 ADA Standards. At a minimum, the Development shall inform each prospective lessee by including language in the Development's written materials listing and describing the unit's features, as well as including the language in each household's lease.

(2) Required Green Building Features in all Family, Elderly, and Person with a Disability Demographic Developments:

All rehabilitation units must include as many of the following required Green Building features as are structurally and financially feasible within the scope of the rehabilitation work utilizing a capital needs assessment performed during the credit underwriting process.

- Low or No-VOC paint for all interior walls (Low-VOC means 50 grams per liter or less for flat; 150 grams per liter or less for non-flat paint);
- Low-flow water fixtures in bathrooms—WaterSense labeled products or the following specifications:
 - Toilets: 1.6 gallons/flush or less,
 - Faucets: 1.5 gallons/minute or less,
 - Showerheads: 2.2 gallons/minute or less;
- Energy Star qualified refrigerator;
- Energy Star qualified dishwasher;
- Water heating minimum efficiency specifications (choose gas, electric, gas tankless, or boiler/hot water maker):
 - Gas:
 - 30 gal = .63 EF; or
 - 40 gal = .61 EF; or
 - 50 gal = .59 EF; or
 - 60 gal = .57 EF; or
 - 70 gal = .55 EF; or
 - 80 gal = .53 EF; or
 - Electric:
 - 30 gal = .94 EF; or
 - 40 gal = .93 EF; or
 - 50 gal = .92 EF; or
 - 60 gal = .91 EF; or
 - 70 gal = .90 EF; or
 - 80 gal = .89 EF; or
 - Tankless gas water heater: minimum .80 EF; or
 - Boiler or hot water maker:
 - < 300,000 Btu/h: 85% Et (thermal efficiency); or
 - 300,000 Btu/h or higher: 80% Et;
- Energy Star qualified ceiling fans with lighting fixtures in bedrooms;
- Air Conditioning (choose in-unit or commercial):

- In-unit air conditioning: minimum 14 SEER; or
 - Central chiller AC system—based on size:
 - 0-65 KBtuh: Energy Star certified; or
 - >65-135 KBtuh: 11.3 EER/11.5 IPLV; or
 - >135-240 KBtuh: 11.0 EER/11.5 IPLV; or
 - >240 KBtuh: 10.6 EER/11.2 IPLV;
 - Caulk, weather-strip, or otherwise seal all holes, gaps, cracks, penetrations, and electrical receptacles in building envelope; and
 - Seal and insulate heating and cooling system ducts with mastic or metal backed tape.
- d. Additional Green Building Features in all Family, Elderly, and Person with a Disability Demographic Developments:

In addition to the Required Green Building Features outlined in b.(2) and c.(2) above, all Applicants must commit to provide enough of the following Additional Green Building Features to achieve a total point value of at least 10 points. The Applicant will be required to commit to the specific Additional Green Building features during credit underwriting and may select at that time the desired features, provided that the total point value equals or exceeds 10 points.

- Programmable thermostat in each unit (2 points)
- Humidistat in each unit (2 points)
- Water Sense certified dual flush toilets in all bathrooms (2 points)
- Light colored concrete pavement instead of or on top of asphalt to reduce the heat-island effect (2 points)
- Energy Star qualified roof coating (2 points) *
- Energy Star qualified roofing materials (metal, shingles, thermoplastic polyolefin (TPO), or tiles) (3 points) *
- Eco-friendly cabinets – formaldehyde free, material certified by the Forest Stewardship Council (3 points)
- Eco-Friendly flooring for entire unit – Carpet and Rug Institute Green Label certified carpet and pad, bamboo, cork, 100% recycled content tile, and/or natural linoleum (3 points)
- Energy Star rating for all windows in each unit (3 points)
- Florida Yards and Neighborhoods certification on all landscaping (2 points)
- Install daylight sensors, timers or motion detectors on all outdoor lighting attached to buildings (2 points)

*Applicant may choose only one option related to Energy Star qualified roofing

- e. In addition to the required features outlined in a. through d. above, all Applications with the Elderly or Person with a Disability Demographic must also provide the following in all units (new construction units and rehabilitation units):
- (1) Fifteen (15) percent of the new construction units must have roll-in showers.
 - (2) In all of the new construction units and in as many of the rehabilitation units as is structurally and financially feasible within the scope of the rehabilitation work utilizing a capital needs assessment performed during the credit underwriting process. However, proposed Developments that primarily serve persons with physical disabilities must include all required accessibility, adaptability, universal design and visitability features listed below. Applicants must include the costs of the features listed below that are planned for the Development in the Development Cost Pro Forma submitted with the Application. If a construction feature is

being altered within the scope of the Rehabilitation work, then the feature must meet the requirements of the list below:

- Full-size range and oven in all units;
- Horizontal grab bars in place around each tub and/or shower, the installation of which meets or exceeds 2010 ADA Standards for Accessible Design, Section 609. In addition, the following standards for grab bars are required:
 - If a bathtub/shower combination with a permanent seat is provided, grab bars shall be installed to meet or exceed 2010 ADA Standards for Accessible Design, Section 607.4.1.
 - If a bathtub/shower combination without a permanent seat is provided, grab bars shall be installed to meet or exceed 2010 ADA Standards for Accessible Design, Section 607.4.2.
 - If a roll-in shower is provided, grab bars shall be installed to meet or exceed 2010 ADA Standards for Accessible Design, Section 608.3.2;
- Reinforced walls for future installation of horizontal grab bars in place around each toilet, the installation of which meets or exceeds 2010 ADA Standards for Accessible Design, Section 604.5.1 (Side Wall);
- Roll-out shelving or drawers in all bottom bathroom vanity cabinets;
- Adjustable shelving in master bedroom closets (must be adjustable by resident); and
- In at least one of the kitchen's bottom or base cabinets, there shall be a large drawer that has full extension drawer slides.

5. Required Resident Programs:

- a. Applications with the Family Demographic must commit to provide at least three (3) of the following resident programs outlined below. The Applicant will make the actual selection of the specific programs during the credit underwriting process.
 - (1) After School Program for Children – This program requires the Applicant or its Management Company to provide supervised, structured, age-appropriate activities for children during after school hours, Monday through Friday. Activities must be on-site.
 - (2) Literacy Training- Applicant or its Management Company must make available, at no cost to the resident, literacy tutor(s) who will provide weekly literacy lessons to residents in private space on-site. Electronic media, if used, must be used in conjunction with live instruction. If the Development consists of Scattered Sites, this resident program must be provided on the Scattered Site with the most units.
 - (3) Employment Assistance Program – Applicant or its Management Company must provide, at no cost to the resident, a minimum of quarterly scheduled Employment Assistance Program workshops/meetings offering employment counseling by a knowledgeable employment counselor. Such a program includes employability skills workshops providing instruction in the basic skills necessary for getting, keeping, and doing well in a job. The instruction must include, but not be limited to, the following:
 - Evaluation of current job skills;
 - Assistance in setting job goals;
 - Assistance in development of and regular review/update of individualized plan for each participating resident;
 - Resume assistance;
 - Interview preparation; and

- Placement and follow-up services.
- (4) Family Support Coordinator - The Applicant must provide a Family Support Coordinator at no cost to the resident. The Family Support Coordinator shall assist residents in assessing needs and obtaining services, with the goal of promoting successful tenancies and helping residents achieve and maintain maximum independence and self-sufficiency. Responsibilities shall include linking residents with public and private resources in the community to provide needed assistance, develop and oversee on-site programs and activities based on the needs and interests of residents, and support residents in organizing group activities to build community and to address and solve problems such as crime and drug activity. The duties of the Family Support Coordinator shall not be performed by property management staff. The Coordinator shall be on-site and available to residents at least 20 hours per week, within the hours of 9 a.m. and 8 p.m. The Coordinator may be an employee of the Development or, through an agreement, an employee of a third party agency or organization that provides these services.
- b. Applications with the Elderly Demographic must commit to provide at least three (3) of the following resident programs outlined below. The Applicant will make the actual selection of the specific programs during the credit underwriting process.
- (1) Literacy Training – Applicant or its Management Company must make available, at no cost to the resident, literacy tutor(s) who will provide weekly literacy lessons to residents in private space on-site. Training must be held between the hours of 8:00 a.m. and 7:00 p.m. and electronic media, if used, must be used in conjunction with live instruction. If the Development consists of Scattered Sites, this resident program must be provided on the Scattered Site with the most units.
 - (2) Computer Training – The Applicant or its Management Company shall make available computer and internet training classes (basic and/or advanced level depending on the needs and requests of the residents). The training classes must be provided at least once a week, at no cost to the resident, in a dedicated space on site. Training must be held between the hours of 8:00 a.m. and 7:00 p.m. and electronic media, if used, must be used in conjunction with live instruction. If the Development consists of Scattered Sites, this resident program must be provided on the Scattered Site with the most units.
 - (3) Daily Activities – Applicant or its Management Company must provide on-site supervised, structured activities, at no cost to the resident, at least five days per week which must be offered between the hours of 8:00 a.m. and 7:00 p.m. If the Development consists of Scattered Sites, this resident program must be provided on the Scattered Site with the most units.
 - (4) Assistance with Light Housekeeping, Grocery Shopping and/or Laundry – The Applicant or its Management Company must provide residents with a list of qualified service providers for (a) light housekeeping, and/or (b) grocery shopping, and/or (c) laundry and will coordinate, at no cost to the resident, the scheduling of services. The Developer or Management Company shall verify that the services referral information is accurate and up-to-date at least once every six (6) months.
 - (5) Resident Assurance Check-In Program – Applicant commits to provide and use an established system for checking in with each resident on a pre-determined basis not less than once per day, at no cost to the resident. Residents may opt out of this program with a written certification that they choose not to participate.

- c. Applications with the Person with a Disability Demographic must commit to provide at least two (2) of the following resident programs outlined below. The Applicant will make the actual selection of the specific programs during the credit underwriting process.

(1) Staff On-Site 24 Hours per Day –

Applicant must provide staff on the Development's premises at all times who will be available and accessible to the residents 24 hours per day, seven days per week, at no cost to the resident. The on-site staff shall be available at all times to receive calls from residents and help determine the approach to address the issue. The Development's owner or designated manager shall develop and implement policies and procedures for staff receiving a resident call and how staff shall assess and manage the call based on a resident's request and/or need. These policies and procedures shall describe the process for ensuring that staffing is adequate to address the 24-hour on-site requirement, including the following:

- Staff vacation;
- Other staff absences;
- Staff temporarily unavailable on site for a short length of time;
- How staff shall manage a resident call when staff is temporarily off-site; and
- Maximum response time of the staff to a resident call, including response time when staff must be temporarily off-site.

(2) Employment Services –

Applicant must provide at no cost to the residents, an employment services program that meets the comprehensive needs of the persons with disabilities population within the Development and shall integrate supportive housing and employment services. The employment services program shall provide the ongoing supports necessary to ensure the participants' success in the workplace to obtain competitive jobs that anyone could have regardless of their disability status. An employment services program shall be comprised of a Lead Agency and community partners. Typical partners in a successful employment services program may include the following:

- Behavioral health agencies;
- Federally Qualified Health Centers;
- Regional Workforce Boards;
- One-Stop Career Centers;
- Case management organizations;
- The local public housing authority
- The state mental health agency; and
- The state vocational rehabilitation agency.

Role of the Lead Agency in the Supported Employment Program:

The entity that acts as the Lead Agency for the employment services program shall act as the coordinator between the partners of the program.

(3) Resident Health Care Coordination Program –

Applicant must provide on-site and at no cost to the residents, a Health Care Coordination Program. Applicant shall partner with health care providers to work directly with residents to provide health care services. These shall include, but are not limited to, the following:

- Primary care to address common medical conditions;
- One-on-one consultations and health assessments,
- Referrals to medical services;
- Medication reminders;
- Health-related classes and group programs; and
- Chronic disease management services.

(4) Resident Community-Based Services Coordination Program –

Applicant must provide on-site and at no cost to the residents, a Resident Community-Based Services Coordination Program. Applicant shall provide existing staff or shall partner with an external organization that will be the primary service coordination provider for this program. The primary service coordination provider must have a minimum of three (3) years’ experience in administering and providing supportive services including outreach, information and referral services, benefits counseling, community-based services planning and coordination, and/or other related supportive services. Such experience must demonstrate that the above supportive services have been oriented to the needs and preferences of each resident in assisting them to access services related to independent activities of daily living, employment, income and housing. If provided by an external organization, the primary services coordination provider shall have professional experience with state and federal supportive services programs related to the residents households that are served in the Development. Resident Services Coordination shall be offered and made available to the Development’s residents regularly and shall be voluntary to residents. Resident participation shall not be a requirement for new or continued residency. Property management and services coordination or provision should not be the responsibility of the same staff persons; the functions should be entirely separate.

6. Limited Development Areas (LDA):

Use the following LDA Chart to determine whether the proposed Development qualifies as an LDA Development for purposes of this RFA.

LDA Chart

County	Demographic Category	Location Description
Alachua	Family	Beginning at the intersection of CR 241/NW 143 rd Street and SR 232/NW69 th Ave/Millhopper Road, follow SR 232/NW69 th Ave/Millhopper Road east to NW 97 th Street. Follow NW 97 th Street south to NW 97 th Blvd. Follow NW 97 th Blvd northeast to SR 232/NW 63 rd Blvd/Millhopper Road/NW 53 rd Avenue. Follow SR 232/NW 63 rd Blvd/Millhopper Road/NW 53 rd Avenue east to NW 52 nd Terrace. Follow NW 52 nd Terrace north to NW 73 rd Avenue. Follow NW 73 rd Avenue east to NW 43 Street. Follow NE 43 Street north to US 441. Follow US 441 south to N SR 121. Follow N SR 121 north to NW CR 231. Follow NW CR 231 north to NE 142 nd Avenue/NE 156 th Avenue. Follow NE 142 nd Avenue/NE 156 th Avenue east to CR 225. Follow CR 225 south to NE 77 Avenue/NE 56 Terrence. Follow NE 77 Avenue/NE 56 Terrence east to SR 24/ NE Waldo Road. Follow SR 24/NE Waldo Road Northeast to US 301/ N Main Street. Follow US 301/N Main Street south to SR 26. Follow SR 26 west to CR 234 / CR 2082. Follow CR 234/ CR 2082 south to US 441. Follow US 441 northwest to SE Wacahoota Road. Follow SE Wacahoota Road north to SR121/Williston Road. Follow SR121/Williston Road south to CR 346. Follow CR 346 west to US 41/US 27/SR 45. Follow US 41/US 27/SR 45 northwest to 202nd Street/CR 13. Follow 202nd Street/CR 13 north to NW 46 th Avenue. Follow NW 46 th Avenue east to 170 th St. Follow NW 170 th Street south to NW 32 nd Avenue. Follow NW 32 nd Avenue east to CR 241/NW 143 rd Street. Follow 241/NW 143 rd Street north to intersection with SR 232/NW69 th Ave/Millhopper Road.

County	Demographic Category	Location Description
Bay	Family	Beginning at the intersection of SR 391/E Baldwin Road and US 231/SR 75, follow US 231 / SR 75 northeast to Pipeline Road. Follow Pipeline Road north to CR 2321. Follow CR 2321 southeast to Titus Road. Follow Titus Road east to US 231/SR 75. Follow US 231/SR 75 north to Star Avenue/SR 719. Follow Star Avenue/SR 719 south to East Bay. Follow East Bay southwest as it merges with St. Andrews Bay and North Bay. Follow North Bay north to SR 385 / Frankford Avenue. Follow SR 385 / Frankford Avenue south to SR 390 / Saint Andrews Blvd. Follow SR 390 / Saint Andrews Blvd northeast to SR 391 / Baldwin Road. Follow SR 391 / Baldwin Road east to US 231 / SR 75.
Bradford	Family	Entire County
Brevard	Family	Entire County
Charlotte	Family and Elderly	5 mile radius around the following latitude/longitude coordinates: *N 26 59 29.4, W 82 1 45.5 (Hampton Point) - this also affects DeSoto and Sarasota Counties
Citrus	Family	Entire County
Clay	Family	From northeastern corner of county, follow the county line west to State Road 21/Blanding Boulevard. Follow State Road 21 south to State Road 224/Kingsely Avenue east to the county line. Follow the eastern county line north to the northeastern corner.
Collier	Family and Elderly	Beginning at the county line and CR 858/CR S858/Oil Well Road, follow CR 858/CR S858/Oil Well Road west to SR 29. Follow SR 29 north to a point directly east of Ranch One Road. Follow this point to Ranch One Road. Follow Ranch One Road west to Camp Keais Road. Follow Camp Keais Road north to CR 846/Immokalee Road. Follow CR 846 /Immokalee Road west to SR 849 / Sanctuary Road N to the northernmost point. Continue north from this point to the county line. Follow the county line east then south to CR 858 / CR S858/ Oil Well Road. And 5 mile radius around the following latitude/longitude coordinates: *N 26 9 40.7, W 81 41 37.4 (Tuscan Isles)
DeSoto	Family and Elderly	Entire County, which includes: 5 mile radius around the following latitude/longitude coordinates: *N 26 59 29.4, W 82 1 45.5 (Hampton Point) - this also affects Charlotte and Sarasota Counties
Duval	Family and Elderly	Beginning at the northern portion of the county line and I-95, follow the county boundary on the western portion of the county to the southern portion of the county boundary and I-95. Follow I-95 north to SR 13/Hendricks Avenue. Follow SR 13/Hendricks Avenue south to Cedar Street. Follow Cedar Street west to the St. John's River. Follow the coast of the St. John's River north to I-95. Follow I-95 northwest to US 90/SR 10/ W Beaver Street. Follow US 90/SR 10/ W Beaver Street west to SR 111/Edgewood Avenue. Follow Edgewood Avenue northeast to I-95. Follow I-95 north to the northern portion of the county line.
	Family	Beginning at the northern portion of the county line and I-95, follow the county boundary on the eastern portion of the county to the southern portion of the county boundary and I-95. Follow I-95 north to Atlantic Blvd. . Follow Atlantic Blvd northeast to Barbara Avenue. Follow Barbara Avenue north to Southhampton Road. Follow Southhampton Road west to Vine Street. Follow Vine Street north to Huntsford Road. Follow Huntsford Road southeast to Alamo Street. Follow Alamo Street north to Utah Avenue. Follow Utah Avenue southeast to the intersection with Bee Street. From this intersection, continue northeast in the same direction of Bee Street to the St. John's River. Follow the St. John's River northeast to the Trout River. Follow the Trout River west to I-95. Follow I-95 north to the northern county line.
	Family and Elderly	Within the 5 mile radius around the latitude/longitude coordinates: *N 30 23 .6,W 81 36 13 (Sundance Pointe), the portion of the circle southeast of the eastern and southern boundary of St. John's River.
Escambia	Family and Elderly	Beginning at the western intersection of the county line and US 90/SR 30/Mobile Hwy/ US 90A/ 9 Mile Road / N Davis Hwy, follow US 90 / SR 30/Mobile Hwy/ US 90A/ 9 Mile Road / N Davis Hwy east to the county line. Follow the county line south to Escambia Bay. Follow Escambia Bay as it merges with Pensacola Bay on the eastern portion of the county, Big Lagoon/Perdido Bay around the southern portion of the mainland, and follow Perdido Bay to the western county line. Follow the county line north to US 90/SR 30.

County	Demographic Category	Location Description
Gadsden	Family and Elderly	Entire County
Hamilton	Family and Elderly	Entire County
Hardee	Family and Elderly	Entire County
Hendry	Family and Elderly	5 mile radius around the following latitude/longitude coordinates: *N26 35 36.4, W 81 38 29 (Vista Palms) - this also affects Lee County
Highlands	Family and Elderly	Entire County
Indian River	Family	Entire County
	Family and Elderly	5 mile radius around the following latitude/longitude coordinates: *N 27 35 11.8, W 80 24 33.2 (Preserve at Oslo) - this also affects St. Lucie County
Lake	Family and Elderly	Entire County, with the exception of the following area where Elderly Developments will be permitted: Beginning at the intersection of CR 44 and CR 452, follow the merged CR 44/CR 452 east to CR 44A/Estes Road. Follow CR 44A / Estes Road south to SR 44 / E Orange Avenue. Follow SR 44 / E Orange Avenue east to CR 44B. Follow CR 44B south to US 441 / SR 500. Follow US 441 / SR 500 west to Mount Homer Road. Follow Mount Homer Road north to David Walker Drive. Follow David Walker Drive north to Kurt Street. Follow Kurt Street north to Taylor Avenue/Clay Blvd. Follow Taylor Avenue/Clay Blvd west to Lake Eustis. Follow Lake Eustis north to SR 19 / CR 44 / N. Bay Street. Follow SR 19 / CR 44 / N. Bay Street north to CR 44. Follow CR 44 to CR 452.
Lee	Family and Elderly	Entire County, which includes: 5 mile radius around the following latitude/longitude coordinates: *N 26 35 36.4, W 81 38 29 (Vista Palms) - this also affects Hendry County *N 26 36 31, W 81 51 3.6 (Westwood)
Leon	Family	Beginning at the intersection of I-10 and Capital Circle NW/SR 263/CR 157, follow Capital Circle NW/SR 263/CR 157 north to Orchard Pond Road. Follow Orchard Pond Road east to CR 155/N Meridian Road. Follow CR 155/N Meridian Road south to CR 154/Bannerman Road/Bradfordville Road/Crump Road southeast to Apalachee Parkway/US 27/SR 20. Follow Apalachee Parkway/US 27/SR 20 east to county line. Follow county line south to SR 260/Natural Bridge Road. Follow SR 260/Natural Bridge Road west to SR 363/Woodville Hwy. Follow SR 363/Woodville Hwy north to SR 260/Oak Ridge Road. Follow SR 260/Oak Ridge Road west to SR 61/Wakulla Springs Road. Follow SR 61/Wakulla Springs Road north to US 319/SR 369/Crawfordville Road. Follow US 319/SR 369/Crawfordville Road northeast to SR 263/SW Capital Circle. Follow SR 263/SW Capital Circle northwest to SR 371/Lake Bradford Road. Follow SR 371/Lake Bradford Road northeast to SR 371/W Orange Ave. Follow SR 371/W Orange Ave west to Eisenhower Street. Follow Eisenhower Street north to Plant Street. Follow Plant Street west to Chipley Street. Follow Chipley Street north to Jackson Bluff Road. Follow Jackson Bluff Road west to Appleyard Drive/Mission Road. Follow Appleyard Drive/Mission Road north to I-10. Follow I-10 west to Capital Circle NW/SR 263/CR 157.
Manatee	Family and Elderly	Entire County
Marion	Family and Elderly	Entire County
Miami-Dade	Family and Elderly	Beginning at the intersection of SW 264 th Street and SW 157 th Avenue, follow SW 264 th Street east to Biscayne Bay. Follow the Bay around the remaining southern portion of the county, then north to a point that is west of the intersection of SW 264 th Street and SW 157 th Avenue. Follow that point east to that intersection.
Palm Beach	Family and Elderly	5 mile radius around the following latitude/longitude coordinates: *N 26 43 8.4, W 80 5 7.7 (Malibu Bay) *N 26 47 58.6, W 80 5 11.1 (Venetian Isles I) *N 26 48 3.3, W 80 5 6.4 (Venetian Isles II) With the exception of 0.25 mile radius around each of the following latitude/longitude coordinates where all Demographics will be permitted: N 26 42 44.3, W 80 03 44.2

County	Demographic Category	Location Description
Pinellas	Elderly	Beginning at the intersection of 13 th Avenue N and 28 th Street N, follow 13 th Avenue N east to Tampa Bay. Follow Tampa Bay south to a point directly east of 19 th Avenue S. Follow that point west to 19 th Avenue S. Follow 19 th Avenue S west to 4 th Street S. Follow 4 th Street S north to Tangerine Avenue S./18 th Avenue S. Follow Tangerine Avenue S/18 th Avenue S west to 28 th Street S. Follow 28 th Street S north to 13 th Avenue N.
Sarasota	Family and Elderly	5 mile radius around the following latitude/longitude coordinates: *N 26 59 29.4, W 82 1 45.5 (Hampton Point) - this also affects DeSoto and Charlotte Counties
Seminole	Family and Elderly	5 mile radius around the following latitude/longitude coordinates**: *N 28 47 1.7,W 81 17 40.6 (Windchase) - this also affects Volusia County **An exception of a 2 mile radius around the following Latitude/Longitude coordinates will permit Elderly Developments: N 28 42 4.1, W 81 20 43.4 (Longwood Station)
St. Johns	Family and Elderly	Entire County, which includes: 5 mile radius around the following latitude/longitude coordinates: *N 29 52 14.5, W 81 20 32.7 (Whispering Woods)
St. Lucie	Family and Elderly	5 mile radius around the following latitude/longitude coordinates: *N 27 20 46.4, W 80 22 56.6 (Peacock Run) *N 27 25 27.6 W 80 22 33.5 (Sabal Chase) *N 27 35 11.8, W 80 24 33.2 (Preserve at Oslo) - this also affects Indian River County
Volusia	Family and Elderly	5 mile radius around the following latitude/longitude coordinates: *N 28 47 1.7,W 81 17 40.6 (Windchase) - this also affects Seminole County
Walton	Family and Elderly	Beginning at the intersection of SR 83, US 331 S, and Owls Head Road, follow Owls Head Road east to a point that is directly north over JW Hollington Road. Follow that point south to JW Hollington Road. Follow JW Hollington Road to the southernmost point. Follow that point west to Joe Dugger Road. Follow Joe Dugger Road south to SR 20 E. Follow SR 20 E west to US 331 S/SR 83. Follow US 331 S/SR 83 south to Lagrange Road. Follow Lagrange Road south Old Oak Road. Follow Old Oak Road north to Holly Point Road. Follow Holly Point Road west to LaGrange Bayou. Follow LaGrange Bayou south into Choctowhatchee Bay. Follow the northern boundary of the Choctowhatchee Bay west around the southern portion of the mainland and into Alaqua Bayou. Follow the northern boundary of Alaqua Bayou to Whitfield Road. Follow Whitfield Road north to SR 20 W. Follow SR 20 W east to Ben King Road as it merges into Segrest Road. Follow Segrest Road/Ben King Road as Ben King Road splits and moves east. At the easternmost point of Ben King Road, follow the point east to SR 83/Madison Street. Follow SR 83/Madison Street to the intersection of US 331 S and Owls Head Road.

*These areas surround Guarantee Fund Developments. In the event that both the loan guaranteed under Guarantee Fund Program and any SMI loan for one of these Developments are paid off prior to the Application Deadline, the Corporation will treat the LDA restriction around that Development as if it was never included on the LDA chart and the LDA restriction related to that Guarantee Fund Development will no longer apply.

7. ELI County Chart:

ELI County Chart					
County	ELI Set-Aside AMI level	County	ELI Set-Aside AMI level	County	ELI Set-Aside AMI level
Alachua	35%	Hamilton	45%	Nassau	33%
Baker	40%	Hardee	45%	Okaloosa	33%
Bay	35%	Hendry	45%	Okeechobee	45%
Bradford	40%	Hernando	40%	Orange	40%
Brevard	35%	Highlands	45%	Osceola	40%
Broward	30%	Hillsborough	40%	Palm Beach	33%
Calhoun	45%	Holmes	45%	Pasco	40%
Charlotte	40%	Indian River	40%	Pinellas	40%
Citrus	45%	Jackson	40%	Polk	45%
Clay	33%	Jefferson	33%	Putnam	45%
Collier	33%	Lafayette	40%	St. Johns	33%
Columbia	45%	Lake	40%	St. Lucie	40%
De Soto	45%	Lee	40%	Santa Rosa	40%
Dixie	45%	Leon	33%	Sarasota	40%
Duval	33%	Levy	45%	Seminole	40%
Escambia	40%	Liberty	40%	Sumter	40%
Flagler	40%	Madison	45%	Suwannee	45%
Franklin	45%	Manatee	40%	Taylor	45%
Gadsden	33%	Marion	45%	Union	40%
Gilchrist	35%	Martin	40%	Volusia	40%
Glades	45%	Miami-Dade	33%	Wakulla	33%
Gulf	45%	Monroe	25%	Walton	40%
				Washington	45%

8. Total Development Cost Per Unit Limitation:

The Corporation shall limit the Total Development Cost (TDC) per unit for all Developments categorized by the construction type of the units as indicated by the Applicant in the RFA. The maximum amounts are provided on the TDC Per Unit Limitation chart set out below (the maximum TDC per unit exclusive of land costs, applying any applicable TDC multiplier) and will be tested during the scoring of the RFA, during the credit underwriting process, and during the final allocation process, as outlined below.

These TDC limitation amounts are effective from the Application Deadline through Final Cost Certification.

Total Development Cost Per Unit Base Limitations

Measure	New Construction Units					Rehabilitation Units	
	Garden Wood*	Garden Concrete*	Mid-Rise-Wood*	Mid-Rise-Concrete*	High-Rise*	Garden*	Non-Garden*
Maximum TDC Per Unit exclusive of Land Costs	\$163,000	\$196,000	\$196,000	\$216,000	\$263,000	\$137,000	\$193,000

* Garden includes all Development Types other than Mid-Rise and High-Rise; Non-Garden includes Development Types of Mid-Rise with Elevator (4 stories, 5 stories, or 6 stories) and High-Rise (7 or more stories); Mid-Rise includes Development Types of Mid-Rise with Elevator (4 stories, 5 stories, or 6 stories); and High-Rise includes Development Type of High Rise (7 or more stories)

- a. Any Application that has an amount that exceeds these limitations will not be eligible to be considered for funding.

- b. Any Applicant that has the Credit Underwriter present a credit underwriting report with an amount that exceeds these limitations by more than 5 percent, taking into consideration an escalation factor for construction costs rising after the Application Deadline of 1.4 percent and incorporating any applicable TDC reduction and adjustments processes provided below will receive a negative recommendation by the Credit Underwriter.

Any Applicant that has the Credit Underwriter present a credit underwriting report with an amount that exceeds these limitations, taking into consideration the applicable escalation factor outlined above, will require staff to review the credit underwriting report for compliance to the TDC reduction and adjustment procedure provided below:

- (1) The Developer fee will be limited to the maximum allowable within the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, in all instances. A Developer fee can be earned on qualifying TDC exclusive of land up to the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, but it cannot be earned on costs in excess of said limitation. If the Development costs exceed the amount allowed by the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, then the maximum allowable Developer fee will be adjusted as outlined below. The maximum allowable Developer fee can be determined by multiplying the applicable TDC Per Unit Base Limitation with respect to the Development as provided in this RFA, inclusive of any applicable escalation factor, by the number of total units in the Development. Second, divide this product by 1.16 and then multiply the result by 16 percent*. This will yield the maximum allowable Developer fee within the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor.
- (2) Prior to determining any necessary adjustment, if the Developer fee initially stated by the Applicant or Credit Underwriter is in excess of the maximum allowable Developer fee as provided in (1) above, the Developer fee will be reduced to said maximum allowable Developer fee and the TDC will be equally reduced to incorporate the cost reduction.

Subsequent to reducing the Developer fee to the maximum allowable amount, additional adjustments may be necessary if the TDC Per Unit Base Limitation remains exceeded. An adjustment shall be determined by reducing the maximum allowable Developer fee as determined in (1) above dollar-for-dollar for any costs in excess of the amount allowed by the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, up to the lesser of (a) the actual amount of costs in excess of the amount allowed by the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, (b) \$500,000, or (c) 25 percent of the maximum allowable Developer fee. If after following this Developer fee limitation process, the TDC exclusive of land costs is reduced to be within the amount allowed by the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, then the Developer fee adjustment calculation is complete. If the TDC exclusive of land costs remains above the amount allowed by the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, then there is an additional Developer fee adjustment, as outlined in (3) below.

- (3) An additional Developer fee adjustment will be initiated to further reduce the allowable Developer fee in the event the TDC exclusive of land (as adjusted above) exceeds the TDC Per Unit Base Limitation. The reduction will be determined by deriving a percentage amount that the TDC exclusive of land costs (as adjusted above) exceeds the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, and multiplying this excess percentage by the amount of the adjusted Developer fee, resulting in a product that is the additional adjustment to the Developer fee. For instance, if the Development's adjusted TDC

exclusive of land costs exceeds the limitation, inclusive of any applicable escalation factor, by 4 percent, then the allowable Developer fee is further reduced by 4 percent. Once this step is complete, there is no further Developer fee adjustment or corresponding cost savings to be incorporated into the TDC as a result of having a TDC exclusive of land costs that exceeds the limitation.

As a note, if the Developer fee in the credit underwriting report is already at or below this allowable Developer fee, then there is no additional adjustment to be incorporated into the Developer fee. This also means there are no corresponding costs savings to reduce the TDC since all TDC cost reductions stemming from this process are coming from reducing the Developer fee. If the Developer fee in the credit underwriting report needs to be reduced to incorporate any adjustment as provided above, then as the Developer fee is reduced, so is the TDC in order to incorporate the reduced Developer fee cost.

For example:

An 120-unit development with a Development Type of Garden reports a TDC of \$17,920,000, inclusive of a stated Developer fee of \$2,470,000, and exclusive of land at time of credit underwriting, and also prior to any adjustment:

Calculate TDC Limitation for the Development and Maximum Allowable Developer fee

- 1.(a) TDC Per Unit Base Limitation, inclusive of any applicable escalation factor:
 $\$137,000 \text{ Per Unit} \times (1 + 1.4\%) = \$138,918 \text{ Per Unit}.$
- 1.(b) Determine TDC Limitation for the Development: $\$138,918 \text{ Per Unit} \times 120 \text{ units} = \$16,670,160.$
- 1.(c) Implied maximum Development Cost per the limitation: $\$16,670,160 \div 1.16 = \$14,370,828.$
- 1.(d) Determine maximum allowable Developer fee within the limitation (prior to any adjustment): $\$14,370,828 \times 16\% = \$2,299,332.$

First Developer fee/TDC adjustment Calculation Methodology (If necessary)

- 2.(a)(i) Is the stated Developer fee greater than the maximum allowable? $\$2,470,000 > \$2,299,332.$
- 2.(a)(ii) If the response to 2.(a)(i) is yes, then determine the excess: $\$2,470,000 - \$2,299,332 = \$170,668$ (excess Developer fee and excess TDC).
- 2.(b) Reduce the stated Developer fee to the lesser of maximum allowable or stated fee and reduce the stated TDC by an equal amount: $\$2,470,000 - \$170,668 = \$2,299,332$; $\$17,920,000 - \$170,668 = \$17,749,332.$
- 2.(c) Determine if the TDC remains in excess of the limitation: $\$17,749,332 - \$16,670,160 = \$1,079,172.$
- 2.(d) Determine the lesser of either (i) \$500,000, (ii) 25 percent of the maximum allowable Developer fee, or (iii) 100% of the excess TDC: $25\% \times \$2,299,332 = \$574,833$; $\$500,000 < \$574,833 < \$1,079,172.$
- 2.(e) Apply the lesser of 2(d) above to determine the Maximum allowable Developer fee, subject to the first adjustment: $\$2,299,332 - \$500,000 = \$1,799,332.$

2.(f) TDC reduction due to Developer fee adjustment: $\$17,749,332 - \$500,000 = \$17,249,332$.

(As a note, this TDC is still greater than the TDC Per Unit Base Limitation, inclusive of any applicable upward adjust so an additional Developer fee adjustment will need to be calculated.)

Second Developer fee/TDC adjustment Calculation Methodology (If necessary)

3.(a) The percentage the TDC without land (as adjusted above for first adjustment) that exceeds the amount allowed by the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor: $\$17,249,332 - \$16,670,160 = \$579,172$; $\$579,172 \div \$16,670,160 = 3.47\%$.

3.(b) Additional adjustment: $3.47\% \times \$1,799,332 = \$62,514$.

3.(c) Final maximum Developer fee, after adjustments: $\$1,799,332 - \$62,514 = \$1,736,818$

3.(d) Final adjusted TDC at time of credit underwriting: $\$17,249,332 - \$62,514 = \$17,186,818$.

3.(e) Verify status of the 5% variance test: $(\$17,186,818 - \$16,670,160) / \$16,670,160 = 3.1\%$, which falls under criteria of being less than or equal to 5% above of the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor.

c. Any Applicant that presents a Final Cost Certification Application (FCCA) that has amounts that exceed the TDC Per Unit Base Limitation, subject to an escalation factor of 1.4 percent will require staff to review the FCCA for compliance to the procedure provided below. If the Development has already had its Developer fee adjusted at credit underwriting as provided in 8.b. above and the TDC without land in the FCCA exceeds the TDC without land provided in the credit underwriting report, then the Developer fee will have an additional adjustment to be incorporated as provided in (4) below.

(1) The Developer fee will be limited to the maximum allowable within the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, in all instances. A Developer fee can be earned on qualifying TDC exclusive of land up to the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, but it cannot be earned on costs in excess of said limitation. If the Development costs exceed the amount allowed by the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, then the maximum allowable Developer fee will be adjusted as outlined below. The maximum allowable Developer fee can be determined by multiplying the applicable TDC Per Unit Base Limitation with respect to the Development as provided in this RFA, inclusive of any applicable escalation factor, by the number of total units in the Development. Second, divide this product by 1.16 and then multiply the result by 16 percent*. This will yield the maximum allowable Developer fee within the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor.

(2) Prior to determining any necessary adjustment, if the Developer fee initially stated by the FCCA is in excess of the maximum allowable Developer fee as provided in (1) above, the Developer fee will be reduced to said maximum allowable Developer fee and the TDC will be equally reduced to incorporate the cost reduction.

Subsequent to reducing the Developer fee to the maximum allowable amount, additional adjustments may be necessary if the TDC Per Unit Base Limitation remains exceeded. An

adjustment shall be determined by reducing the maximum allowable Developer fee as determined in (1) above dollar-for-dollar for any costs in excess of the amount allowed by the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, up to the lesser of (a) the actual amount of costs in excess of the amount allowed by the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, (b) \$250,000, or (c) 10 percent of the maximum allowable Developer fee. If after following this Developer fee limitation process, the TDC exclusive of land costs is reduced to be within the amount allowed by the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, then the Developer fee adjustment calculation is complete. If the TDC exclusive of land costs remains above the amount allowed by the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor, then there is an additional Developer fee adjustment, as outlined in (3) below.

- (3) An additional Developer fee adjustment will be initiated to further reduce the allowable Developer fee in the event the TDC exclusive of land costs (as adjusted above) exceeds the TDC Per Unit Base Limitation. The reduction will be determined by deriving a percentage amount that the TDC exclusive of land costs (as adjusted above) exceeds the amount allowed by the TDC Per Unit Base Limitation, inclusive of any applicable escalation factor and multiplying this excess percentage by the amount of the adjusted Developer fee, resulting in a product that is the additional adjustment to the Developer fee. For instance, if the Development's adjusted TDC exclusive of land costs exceeds the limitation, inclusive of any applicable escalation factor, by 4 percent, then the allowable Developer fee is further reduced by 4 percent. Once this step is complete, there is no further Developer fee adjustment or corresponding cost savings to be incorporated into the TDC as a result of having a TDC exclusive of land costs that exceeds the limitation.

As a note, if the Developer fee in the FCCA is already at or below this allowable Developer fee, then there is no additional adjustment to be incorporated into the Developer fee. This also means there are no corresponding costs savings to reduce the TDC since all TDC cost reductions stemming from this process are coming from reducing the Developer fee. If the Developer fee in the FCCA needs to be reduced to incorporate any penalties provided above, then as the Developer fee is reduced, so is the TDC in order to incorporate the reduced Developer fee cost.

- (4) For those Developments that have already had its Developer fee adjusted at credit underwriting as provided in 8.b. above and whose TDC without land in the FCCA exceeds the TDC without land provided in the credit underwriting report, the allowable Developer fee will incorporate an additional adjustment. This additional Developer fee adjustment will be the lesser of (a) the difference between the amount of TDC exclusive of land costs as reported in the FCCA that is in excess of the TDC exclusive of land costs provided in the credit underwriting report, (b) \$250,000, or (c) 10 percent of the allowable Developer fee reported in the credit underwriting report. If the Developer fee in the FCCA is already equal to or less than the allowable Developer fee as determined with the incorporation of this additional Developer fee adjustment, then neither the Developer fee nor the TDC is further reduced.

For example:

Assuming the Development in the example provided in 8.b. above provides a FCCA with a TDC exclusive of land costs of \$300,000 higher than the TDC exclusive of land costs provided in the credit underwriting report, but the Developer fee is the same as provided in the credit underwriting report of \$1,736,818. The additional Developer fee adjustment will be the lesser of (a) \$300,000 (the new excess costs), (b) \$250,000 (the maximum dollar limit

of this additional Developer fee adjustment), or (c) \$173,682 (10% of the allowable Developer fee reported in the credit underwriting report).

Since (c) is the lowest of the three options, the allowable Developer fee and the TDC will both be lowered by \$173,682. The allowable Developer fee will be \$1,563,136 (the allowable Developer fee reported in the credit underwriting report of \$1,736,818, less the adjustment of \$173,682). The TDC exclusive of land costs in the FCCA would be adjusted to \$17,313,136 (\$17,186,818 from the credit underwriting report plus \$300,000 of new additional costs less \$173,682 for the reduction in allowable Developer fee).

*These figures represent the applicable Developer fee percentage for the Development (16%) and one plus the applicable Developer fee percentage for the Development (1+16%).

9. Leveraging Classification:

All eligible Applications will be classified as either Group A or Group B based on the amount of total Corporation funding per set-aside unit, as outlined below:

a. Calculating the Set-Aside Units:

The total number of set-aside units for each Application will be computed by multiplying the total number of units within the proposed Development by the highest Total Set-Aside Percentage the Applicant committed to as stated in the last row of the set-aside breakdown chart in the Set-Aside Commitment section of the Application. Results that are not a whole number will be rounded up to the next whole number.

b. The Corporation will calculate the total Corporation funding per set-aside unit for each Application in the following manner:

- (1) If the Development is not located in a HUD designated HCA, the Eligible Housing Credit Request Amount will be multiplied by 9.0; or
- (2) If the Development is located in a HUD designated HCA, the Eligible Housing Credit Request Amount will be multiplied by 9.0 and that product will be divided by 1.3.

c. To determine each eligible Application's Leveraging Classification, all eligible Applications will be listed in ascending order beginning with the Application that has the lowest amount of total Corporation funding per set-aside unit and ending with the Application that has the highest amount of total Corporation funding per set-aside unit.

The total number of eligible Applications will be multiplied by 90 percent and the resulting figure will be rounded up to the next whole number (the resulting figure after rounding will be referred to as the "A/B Cut-Off"). A line will be drawn below the Application whose place on the list is equal to the A/B Cut-Off. If any Application(s) below the line has the same total Corporation funding request per set-aside unit as the Application immediately above the line, the line will be moved to a place immediately below that Application(s). Applications above the A/B Cut-Off will be classified as Group A and Applications below the A/B Cut-Off will be classified as Group B.

10. Florida Job Creation Preference:

Each Application will be measured to determine whether it qualifies for the Florida Job Creation Preference. To determine eligibility for the preference, the Corporation will calculate the Application's Florida Job Creation score, which will reflect the number of Florida jobs per \$1 million of Housing Credit Allocation. Only Applications with a score equal to or greater than 100 will qualify for the Florida Job Creation Preference in Section Four B of the RFA.

Determination of the Florida Job Creation score will be based on the following information:

- The number of new construction and/or rehabilitation units committed to by the Applicant (as stated by the Applicant at question 4.e. of Exhibit A of the RFP);
- The applicable Florida job creation rate for the type of units:
 - Rate of 3.376 Florida Jobs per Unit for proposed new construction units;
 - Rate of 1.534 Florida Jobs per Unit for proposed rehabilitation units; and
- The Eligible Housing Credit Request Amount.

The score for the Florida Rate of Job Creation per \$1 million of Housing Credit Allocation will be measured using one of the following calculations:

- a. Developments consisting of only rehabilitation units:

Number of rehabilitation units x 1.534 Florida Jobs per Unit x 1,000,000 / Eligible Housing Credit Request Amount = Florida Jobs per \$1 million of Housing Credit Allocation.

For example:

Application A consists of 80 rehabilitation units and has an Eligible Housing Credit Request Amount of \$1,500,000.

$$80 \times 1.534 \times 1,000,000 / 1,500,000 = \text{Florida Job Creation score of } 81.813.$$

- b. Developments consisting of both new construction units and rehabilitation units:

(Number of new construction units x 3.376 Florida Jobs per Unit + number of rehabilitation units x 1.534 Florida Jobs per Unit) x 1,000,000 / Eligible Housing Credit Request Amount = Florida Jobs per \$1 million of Housing Credit Allocation.

For example:

Application B consists of 56 new construction units and 24 rehabilitation units and has an Eligible Housing Credit Request Amount of \$1,500,000.

$$[(56 \times 3.376) + (24 \times 1.534)] \times 1,000,000 / 1,500,000 = \text{Florida Job Creation score of } 150.581.$$

In above examples, Application A will not qualify for the Job Creation Preference because it has a Florida Job Creation score that is less than 100. Application B will qualify for the Florida Job Creation Preference because it has a Florida Job Creation score that is at least 100.

11. Fees:

The Corporation and, if applicable, the Credit Underwriter shall collect via check or money order from the Applicant the following fees and charges in conjunction with the HC Program. Failure to pay any fee shall cause the allocation to be withdrawn as outlined in the Carryover Allocation Agreement and the credit underwriting and program requirements outlined in Rule Chapter 67-48, F.A.C.

a. Application Fee:

All Applicants requesting HC shall submit to the Corporation as a part of the Application submission a non-refundable Application fee of \$3,000.00.

b. Credit Underwriting Fees:

The following fees are not the fees that will be charged, but are listed below for estimation purposes of completing your pro-forma in the Application. The actual fees will be determined based on the current contract and any addendum for services between the Corporation and the Credit Underwriter(s) in effect at the time underwriting begins.

(1) Initial HC fee: \$11,511

(2) Re-underwriting fee: \$167 per hour, not to exceed \$7,417

If a Housing Credit Development involves Scattered Sites of units within a single market area, a single credit underwriting fee shall be charged. Any Housing Credit Development requiring further analysis by the Credit Underwriter pursuant to Section 42(m)(2) of the IRC will be subject to a fee based on an hourly rate determined pursuant to contract between the Corporation and the Credit Underwriter. All Credit Underwriting fees shall be paid by the Applicant prior to the performance of the analysis by the Credit Underwriter.

c. Administrative Fees:

With respect to the HC Program, each for-profit Applicant shall submit to the Corporation a non-refundable administrative fee in the amount of 8 percent of the annual Housing Credit Allocation amount stated in the Preliminary Allocation. The administrative fee shall be 5 percent of the stated annual Housing Credit Allocation for Non-Profit Applicants. The administrative fee must be received by the Corporation as stated in the Preliminary Allocation.

d. Compliance Monitoring Fees:

The following fees are not the fees that will be charged, but are listed below for estimation purposes of completing your pro-forma in the Application. The actual fees will be determined based on the current contract and any addendum for services between the Corporation and the Compliance Monitor(s).

(1) Pre-final allocation compliance monitoring fee comprised of a base fee of \$1,872 + an additional fee per set-aside unit of \$9.56, subject to a minimum of \$2,928, to be collected as stated in the Preliminary Housing Credit Allocation or Carryover Allocation Agreement.

(2) Annual HC compliance monitoring fee –

Annual fee to be comprised of a base fee of \$156 per month + an additional fee per set-aside unit of \$9.56 per year, subject to a minimum of \$244 per month, and subject to adjustments

annually, but not decreased, based on the South Region Consumer Price Index for the twelve month period ending each November 30th, which this automatic increase shall not exceed 3 percent of the prior year's fee, for the full Housing Credit Extended Use Period collected at final allocation based on a quarterly payment stream discounted at a rate of 2 percent.

- (3) RD Developments - \$450 per Development for the full Housing Credit Extended Use Period collected at final allocation based on a quarterly payment stream discounted at a rate of 2 percent. Upon prepayment or repayment of the RD loan, the previously identified RD Development will be identified as a non-RD Development and the annual compliance monitoring fee will be adjusted accordingly.

If during any year subsequent to the Final Housing Credit Allocation, there is a fee increase based on the Consumer Price Index, as stipulated in the current contract for services between the Corporation and the Compliance Monitor(s) or upon prepayment or repayment of the RD loan, the additional fee will be billed directly to the Development.

- (4) Follow-up Review - \$167 per hour.

e. Construction Inspection Fees:

The following fees are not the fees that will be charged, but are listed below for estimation purposes of completing your pro-forma in the Application. The actual fees will be based on the current contract and any addendum for services between the Corporation and the Servicer(s).

On-site construction inspection - \$167 per hour, not to exceed \$1,664 per inspection.

f. Additional HC Fees:

- (1) If the Applicant requests permission to return its HC allocation and receive a new HC allocation and such request is approved, whether by the Executive Director in accordance with the QAP or as approved by the Board, the Applicant will be charged a nonrefundable processing fee of \$15,000 per request.

- (2) HC Applicants shall be responsible for all processing fees related to the HC Program.

12. Identity of Remaining Members of Development Team:

Within 7 Calendar Days of the date of the invitation to enter credit underwriting, the following information must be provided to the Corporation. For purposes of this provision, the Applicant may use (i) the verification forms (Forms Rev. 01-14) which are available by clicking [here](#) , or (ii) the 2013 verification forms which are available by clicking [here](#).

- a. Identify any inexperienced co-Developer(s) by providing the name, address, telephone and facsimile numbers, e-mail address, and the relationship of the co-Developer to the Applicant.
- b. Identify the Management Company by providing the completed and executed Florida Housing Finance Corporation Management Company or Principal of Management Company General Management Experience Certification form.
- c. Identify the General Contractor by providing the completed and executed Florida Housing Finance Corporation General Contractor or Qualifying Agent of General Contractor Certification form.

- d. Identify the Architect by providing the completed and executed Florida Housing Finance Corporation Architect Certification form.
- e. Identify the Attorney by providing the completed and executed Florida Housing Finance Corporation Attorney Certification for Housing Credits form.
- f. Identify the Accountant by providing the completed and executed Florida Housing Finance Corporation certification of Accountant form.
- g. If the proposed Development is an Elderly ALF, identify the Service Provider by providing the completed and executed Florida Housing Finance Corporation Service Provider Certification form.

13. Certification of Ability to Proceed:

Within 21 Calendar Days of the date of the invitation to enter credit underwriting, the following information must be provided to the Corporation. For purposes of this provision, the Applicant may use (i) the verification forms (Forms Rev. 01-14) which are available by clicking [here](#) , or (ii) the 2013 verification forms which are available by clicking [here](#).

- a. Submission of the completed and executed Florida Housing Finance Corporation Local Government Verification of Status of Site Plan Approval for Multifamily Developments form.
- b. Submission of the completed and executed Florida Housing Finance Corporation Local Government Verification that Development is Consistent with Zoning and Land Use regulations form or the completed and executed Florida Housing Finance Corporation Local Government Verification that Permits are not Required for this Development form, as applicable.
- c. Evidence from the Local Government or service provider, as applicable, of the availability of infrastructure as of Application Deadline, as follows:
 - (1) Electricity: Submission of the completed and executed Florida Housing Finance Corporation Verification of Availability of Infrastructure – Electricity form or a letter from the service provider which is dated within 12 months of the Application Deadline, is Development specific, and specifically states that electricity service is available to the proposed Development as of the Application Deadline.
 - (2) Water: Submission of the completed and executed Florida Housing Finance Corporation Verification of Availability of Infrastructure – Water form or a letter from the service provider which is dated within 12 months of the Application Deadline, is Development specific, and specifically states that water service is available to the proposed Development as of the Application Deadline.
 - (3) Sewer: Submission of the completed and executed Florida Housing Finance Corporation Verification of Availability of Infrastructure – Sewer Capacity, Package Treatment, or Septic Tank form or a letter from the service provider which is dated within 12 months of the Application Deadline, is Development specific, and specifically states that sewer service is available to the proposed Development as of the Application Deadline.
 - (4) Roads: Submission of the completed and executed Florida Housing Finance Corporation Verification of Availability of Infrastructure – Roads form or a letter from the Local Government which is dated within 12 months of the Application Deadline, is Development

specific, and specifically states that Roads are available to the proposed Development as of the Application Deadline.

- d. Submission of the completed and executed Florida Housing Finance Corporation Verification of Environmental Safety Phase I Environmental Site Assessment form, and, if applicable, the completed and executed Florida Housing Finance Corporation Verification of environmental Safety Phase II Environmental Site Assessment form.