

Tab 3 - Selection Criteria Self-Scoring

All applicants must complete the Selection Criteria Self-Scoring Sheet. Prior to completing, review the Selection Criteria as presented in the 2012 Allocation Plan. A narrative of the applicant's selections is recommended but not required.

SELECTION CRITERIA SELF-SCORING SHEET

(Submit under Tab # 3)

All Applications submitted under the PennHOMES and Tax Credit Programs will be ranked in accordance with the Selection Criteria shown in the Qualified Allocation Plan. The applicant should complete this self-scoring sheet and submit under Tab 3 to the Application. The self-scoring sheet will assist the Agency in its review of the Application, and will demonstrate for the applicant the competitiveness of the proposal. The Selection Criteria in the Allocation Plan and Tab #3 provides a detailed description of each of these Criteria. Please refer to the Selection Criteria as needed to determine the appropriate ranking considerations for each category.

A. Community and Economic Impact

20 points

1. Underserved Areas

- _____ a. General Occupancy Developments
- Low poverty rates
 - Limited affordable housing options, both subsidized and non-subsidized
 - Limited affordable housing production in past 20 years
 - Close proximity to employment
 - Strong housing markets
 - High owner-occupied markets
- _____ b. Senior Occupancy Developments
- Large number of seniors eligible for affordable housing
 - Limited affordable housing options, both subsidized and non-subsidized
 - Limited affordable housing production in past 20 years
 - Close proximity to amenities for the senior population, including health and retail establishments, home health agencies and hospitals

AND/OR

2. Community Revitalization Plans

_____ Community Revitalization Plans – A critical circumstance is the development's forming an important part of a broader or comprehensive program of neighborhood improvement which has the capability of changing fundamentally the character of that neighborhood or enhancing the lives and amenities available to residents of the community. Such improvement should include the provision of mixed income housing. A program of neighborhood improvement includes municipal support articulated in a publicly approved community plan or in the form of significant funding commitments, or evidence of substantial major investment in the area that is consistent with an existing comprehensive plan for neighborhood improvement which includes contributing to a transit oriented design initiative. Such funding commitments or major investments cannot be derived solely from the development of Tax Credit properties and may include proposals participating in: Main Street, Elm Street, Neighborhood Partnership or other programs of the Pennsylvania Department of Community and Economic Development; the Agency's Homeownership Choice Programs; the Healthy Village Initiative of the Local Initiatives Support Corporation; the Blueprint Communities Initiative of the Federal Home Loan Bank or similar community support programs. Additionally, the plan should generally include municipal support, private investment and/or private sector commitments to the area. The Agency will consider in its evaluation of community impact the use of existing housing or buildings if the development is not located in a qualified census tract

Total Points Community and Economic Impact _____

B. Development Characteristics

30 points

1. Energy Conservation/Green Building – The Agency may award up to **20 points** maximum for the provision of the following: (initial all that apply)

Smart Site Selection - 5 points for each if the development is located on, or is a

_____ Brownfield (A former **industrial or commercial property** on which redevelopment or reuse is complicated by the presence of a hazardous substance, pollutant or contaminant)

_____ **Residential Infill** (A vacant, **previously developed** property or one containing a dilapidated residential structure, located between developed properties within an existing developed residential or **commercial/residential** neighborhood)

_____ Adaptive Reuse (The rehabilitation of an existing vacant **non-residential** building into housing or housing/commercial space)

Renewable Energy Systems – 5 points each if the development will include the following:

_____ Solar Thermal - Solar thermal panels will be provided capable of supplying at least 5% of the development's estimated domestic hot water needs

_____ Solar Photovoltaic - Solar PV panels will be provided capable of supplying at least 5% of the development's estimated electrical demand

_____ Wind Power Generation - Wind turbine(s) will be provided capable of supplying at least 5% of the development's estimated electrical demand

_____ Geothermal Heating/Cooling - A geothermal system will be provided capable of satisfying the heating and cooling requirements for the entire development

Green Building/Sustainability – 5 points each if the development will include the following:

_____ Recycled Content Materials - Recycled materials shall make up 5% of the value of the construction materials

_____ Certified/Salvaged/Engineered Wood Products – At least 15% of the cost of all wood products including doors, trim and cabinetry, shall be for materials certified in accordance with the Forest Stewardship Council, salvaged wood, or engineered framing materials.

_____ Construction Waste Management – At least 15% of non-hazardous construction and demolition debris shall be recycled or salvaged.

Total Points for B.1. _____

2. **Site Selection Score** - As part of the Agency's review of the Application, the Agency conducts a development site visit and reviews the site and market requirements as set forth in the Multifamily Housing Application and Guidelines which include, but are not limited to, neighborhood characteristics, site and location, proximity to services and amenities and marketability. Points may be awarded up to **10 points** for those developments with the following scores:

<u>Score</u>	<u>Points</u>
>70-85	5
>85-100	10

_____ Site Selection Score

Points for B.2. _____

Total Points for Development Characteristics _____

C. Resident Population and Services

50 points

1. Income and Rent Targeting – Up to **20 points** may be awarded for developments that are designed to be substantially occupied by and affordable to residents with incomes that are at or below 50% of the area median income. Points will be considered for the following percentages of units affordable to and occupied by residents whose incomes are at or below 50% of area median income:

<u>Percentage</u>	<u>Points</u>
>10-20%	4
>20-30%	8
>30-40%	12
>40-50%	16
>50%	20

Indicate the number of units to be occupied by and affordable to residents at or below 50 percent of area median income: _____

Points for C.1. _____

2. Designated Populations & Supportive Services (10 Points) – To receive points in this category, the development will provide evidence that appropriate services will be provided for the entire resident population for the duration of the compliance period. Evidence consists of a supportive services plan that:

- Is specific to the development and effectively addresses the anticipated service needs of the target resident population.

General occupancy developments should deliver or coordinate services that: improve building and unit maintenance; stabilize occupancy by improving residents' ability to uphold their lease obligations; and enhance quality of life through increased self-sufficiency and programs that improve life skills, employment, education, income/asset building, child and youth development, community building, and access to services.

Senior occupancy developments should deliver or coordinate services that: stabilize occupancy by improving residents' ability to uphold their lease obligations throughout the aging process and enhance quality of life through improved access to services and benefits, health promotion, community building, and socialization.

Developments for populations with special needs should deliver or coordinate services that stabilize occupancy by improving residents' ability to uphold their lease obligations and enhance quality of life through improved access to services that support the needs of the targeted population.

- Includes sufficient funds to implement the described plan of services. It is recommended that this funding be set aside in a supportive services escrow account, but the development's annual operating budget, collaboration with a community-based service provider (include letter of intent or Memorandum of Understanding) or funds from other identified sources may be used. If currently committed funds fall short of the cost of services for at least the first fifteen year period, identify how services will be funded for the remainder of the compliance period.
- Utilizes a service provider/coordinator with the capacity to implement described plan of services. The recommended minimum is 1 hour of on-site dedicated staffing per week for every 5 units. Services staff should have access to a computer with Internet and email capabilities. There should be sufficient space to carry out the described services, including adequate office and community space.

Satisfactory completion of the above three factors are the minimum requirements for 5 points. Demonstrated commitment of sufficient funds for at least 15 years and meeting or exceeding the recommended minimum on-site staffing may result in an additional 5 points.

Confirmation from the service provider regarding the availability of applicable services at initial occupancy of the development will be required prior to issuing the IRS Form 8609. To ensure the continued provision of supportive services, the Restrictive Covenant Agreement will reflect such commitment.

Points for C.2. _____

3. Accessible Units - The Agency may award **10 points** for developments providing twice as many fully accessible units than otherwise required (under local, state, or federal mandate, whichever is greater). For preservation developments, consideration will be given if the development increases the number of accessible units by at least five percent of the total number of units.

Number of accessible units required under local mandate: _____
 Number of accessible units required under state mandate: _____
 Number of accessible units required under federal mandate: _____
 Number of accessible units to be provided: _____

Preservation Developments:
 Number of existing fully accessible units: _____
 Number of fully accessible units to be provided: _____

Points for C.3. _____

4. Large Families – Up to **10 points** may be awarded for those developments providing units with three or more bedrooms for large families, based on the following percentages:

Percentage	Points
>15-20%	6
>20-25%	8
>25%	10

(High rise and senior developments cannot qualify for this category.)

State number of three or more bedroom units to be developed: _____

State percentage of three or more bedroom units to the total number of units in the development: _____

Points for C.4. _____

Total Points for Resident Population and Services _____

D. Development Process

25 points

1. Noncompliance – The Agency may deduct up to **10 points** from the ranking score for proposals involving either an applicant (or any related entity) that owns a managing or controlling interest in a Pennsylvania Tax Credit development or a management agent of such development who has unresolved IRS Form 8823 noncompliance issues, has not met the requirements of the Restrictive Covenant Agreement or failed to meet the selection criteria for which an allocation of Tax Credits was made.

Negative points for D.1. _____

2. Ability to Proceed – Points will be awarded for zoning, committed funding sources and equity investment. As the Agency strives to make resources available to those projects which can quickly and effectively utilize its resources, consideration will be given to those properties which can demonstrate the ability to proceed. A total amount of **25 points** may be awarded in this category. (The Selection Criteria in the Allocation Plan and in Tab #3 provides a detailed description of each of these Criteria.)

- _____ Zoning (5 points)
 _____ Equity Investment (10 points)
 _____ Commitment of Funds (Up to 10 points)

Points for D.2. _____

Total Points for Development Process _____

E. Financial Aspects of Development **10 points**

1. Development Cost Savings – The Agency may award up to **10 points** to Applications which have a Maximum Basis (as defined in the Allocation Plan) below the Maximum Per Unit Basis Limitations. Points in this category will generally only be considered for substantial rehabilitation or new construction developments which evidence quality construction at efficient cost levels. Most preservation applications will not qualify for this category.

Percentage Below Max Basis:	Points
10-20%	5
>20%	10

Points for E.1. _____

Total Points for Financial Aspects of Development _____

F. Other **10 points**

Complete and Accurate Application Package – Up to **10 points** will be added to the total score of an application for completeness and for including all essential components necessary for the Agency to determine financial feasibility and project eligibility.

Total Points for Other _____

Estimation of Total Points Through Self-Scoring * _____ *

***Note:** If less than **80 points**, the application will not qualify for funding and should not be submitted.