MASSACHUSETTS Executive Office of Housing and Livable Communities Local Initiative Program Application for Comprehensive Permit Projects

INSTRUCTIONS

Please submit three copies of the application and attachments. Note: only one set of site plan and sample elevations (attachments 11 and 12 noted on page 22) are required. An application fee, payable to the Executive Office of Housing and Livable Communities, shall be submitted with the application. The schedule of fees is as follows:

	Project Fee	plus	Per Unit Fee
Municipality	\$1,000		\$30
Non-Profit	\$1,750		\$40
All Others	\$4,000		\$50

Mail to:

Local Initiative Program Executive Office of Housing and Livable Communities (HLC) 100 Cambridge Street, Suite 300 Boston, MA 02114 Attn: Rieko Hayashi, LIP Director

To complete the application electronically, simply position your cursor on a line and type. Use the tab key to move between questions.

If you have any questions, please refer to the HLC 40B Guidelines, specifically Section VI. For further assistance, contact Rieko Hayashi at 617-573-1426 or <u>rieko.hayashi@mass.gov</u>.

NOTE: For Rental Projects, to complete information on Project Feasibility (Section X), go to the One Stop Application at <u>http://www.mhic.com</u> and complete Section 3 Sources and Uses and Section 4 Operating Pro Forma. Submit the sections with the Application.

Application Contents:

- I. General Information
- II. Community Support
- III. Municipal Contact Information
- IV. Development Team
- V. Project Information
- VI. Site Information
- VII. Design and Construction

- VIII. Surrounding Area
- IX. Financing
- X. Project Feasibility
- XI. Development Schedule
- XII. Marketing Outreach and Lottery
- XIII. Checklist of Attachments

January 2016

	MASSACHUSETTS Department of Housing & Community Development Local Initiative Program Application for Comprehensive Permit Projects							
I.	I. GENERAL INFORMATION							
	Name	nunity: of Development: ddress: oper:						
	1.	Type of Housing: Single Family house Condominium	 Rental Age Restricted 					
 2. Project Characteristics: New Construction Conversion Rehabilitation Other 								
	3.	Total Acres Der	nsity of Project (units/acre)					
	4.	Unit Count:						
		Total Number of Units Market Rate \$ Affordable \$						
	5. Unit Prices/Rents: Market Rate \$ Affordable \$							
Comp Chief	Required Signatures for the Comprehensive Permit Project Application Chief Executive Official of Municipality:Chair, Local Housing Partnership (if applicable):							
Signat	ture:		Signature:					
Print N	Name:		Print Name:					
Date:			Date:					

II. COMMUNITY SUPPORT

1. <u>Letter of Support from Municipality</u> - Attach a letter containing a short narrative on the basics of the project, the history of the project, the ways in which the community is providing support, and how the development team has addressed any concerns the community has. The letter must be signed by the chief elected official of the community.

2. <u>Letter of Support from Local Housing Partnership</u> - If the community has a housing partnership, please attach a letter from them indicating their support for the project. The letter should summarize how the partnership has been working with the developer.

3. <u>Local Contributions</u> - Check off all that apply and provide a brief description at the end.

	Land donation (dollar value) Building donation (dollar value)
H	Marketing assistance
H	Other work by local staff
Π	Density increase
	Waiver of permit fees
	Other regulatory or administrative relief (specify)
	Local funds (cash)
	Amount \$ Source:
	HOME funds
	Agreement by a lender to provide favorable end-loan financing (ownership
project	s only)
	Other (specify)

Briefly explain the contributions:

4. <u>Municipal Actions and Local Plans</u> - Briefly describe how the project fits with any planning the community has done (e.g. master plan, community development plan, affordable housing plan) and other local land use and regulatory actions that provide the opportunity for affordable housing (including multi-family and overlay districts, inclusionary zoning by-laws and ordinances).

III. MUNICIPAL CONTACT INFORMATION

Chief Elected C Name	Official
Address	
Phone	
Email	
Town Administ Name Address Phone Email	rator/Manager
City/Town Plan Name	ner (if any)
Address	
Phone	
Email	
City/Town Cou	nsel
Address	
Phone	
Email	
Name	al Housing Partnership (if any)
Address	
Phone	
Email	
Name	ntact Person for this project
Address	
Phone	
Email	

IV. DEVELOPMENT TEAM INFORMATION (include all development members)

Developer Name Address Phone Email Tax ID	
Contractor Name Address Phone Email Tax ID	
Architect Name Address Phone Email Tax ID	
Engineer Name Address Phone Email Tax ID	
Attorney Name Address Phone Email Tax ID	
Housing Cons Name Address Phone Email Tax ID	ultant
Marketing/Lott Name Address Phone Email Tax ID	ery Agent

TEAM EXPERIENCE – DEVELOPER/CONTRACTOR QUALIFICATIONS

Complete the charts on the following pages for all housing projects undertaken by the developer and the contractor during the past five years. Include projects currently in construction. Provide owner references for each project, including a current phone number. Alternatively, a resume outlining the experience that covers the items listed on the chart below may be submitted.

1. Developer:_____

Project Summary	Project #1	Project #2	Project #3	Project #4
Project Name:				
Community Address:				
Housing Type:				
Number of Units:				
Total Development				
Costs:				
Subsidy Program (if				
applicable):				
Date Completed:				
Reference: Name and				
Telephone #:				

2. Contractor:_____

Project Summary	Project #1	Project #2	Project #3	Project #4
Project Name:				
Community Address:				
Housing Type:				
Number of Units:				
Total Development				
Costs:				
Subsidy Program (if				
applicable):				
Date Completed:				
Reference: Name and				
Telephone #:				

3. Other Chapter 40B Experience

Have you or any members of your team had previous Chapter 40B experience with HLC)
and/or other subsidizing agencies?	
If yes, please explain.	_

4. Bankruptcy / Foreclosure

Have you or any entities you control ever filed for bankruptcy or have had a property foreclosed?

If yes, please explain.

DEVELOPER CERTIFICATION

The	undersigned	hereby					(Title) o	
			(Legal IN	ame or		,	d that the information requested	
below	for the project	known as				(Proje	ect Name) is complete and that a	II
inform	ation containe	d in this a	pplication	is true	and cor	rect to	o the best of his/her knowledge	÷.
The u	ndersigned De	eveloper a	grees to	execute	HLC m	odel	documents, as required. If the	е
Develo	oper is other th	nan a non-	profit corp	oration	or public	c entit	ty, the Developer hereby certifies	s
that it	shall comply w	ith all repo	rting requ	irement	ts describ	bed in	760 CMR 56.00 and as set forth	n
	LIP Guidelines		0 1					

____·

Signature of Developer _____

Print Name: _____

Date _____

V. PROJECT INFORMATION

1.	Type of Housing: Single-Family House Condo Rental Other		Total Number of Units
2.	Total Number of Units	Affordable	Market
3.	Project Style: Detached single-family k Rowhouse/townhouse Duplex Multifamily house (3+ fa Multifamily rental buildin Other (specify)	mily)	Total Number of Units

- 4. Is this an age-restricted (55+) Development? Yes No I If yes, please submit a marketing study that demonstrates an understanding of the region's demographics, market demand and the particular strategies necessary to attract buyers to both market and affordable units.
- 5. Estimate the percentage of the site used for:

 Buildings _____
 Parking & Paved Areas _____

 Usable Open Space _____
 Unusable Open Space _____

- Is any portion of the project designed for non-residential use?
 If yes, explain the non-residential uses.
- 7. Sustainable Development Design and Green Building Practices

In accordance with the Sustainable Development Principles adopted by Governor Patrick's Administration in 2007, HLC encourages housing development that is consistent with sustainable development design and green building practices. For more information, see Appendix VI.A-1 and VI.B-1 of the 40B Guidelines for a list of links to resources and opportunities related to sustainable development.

A. How will this development follow Sustainable Development Principles?

B. How will the project maximize energy efficiency and meet Energy Star Standards?

C. What elements of "green design" are included in the project (e.g. reduction of energy and water consumption, increasing durability and improving health)?

_____.

8.	Proje	Project Eligibility						
	А. □ Y	Have you ever applied for a project eligibility letter involving any portion of the site, or are you aware of any prior application for a project eligibility letter involving any portion of the site? Yes INO If yes, explain.						
	В.	Has the municipality denied a permit on another proposal for this site within the last 12 months?						
9.	Outst	anding Litigation						
		ere any outstanding litigation relating to the site? Yes No s, explain.						

10. Unit Composition

Complete the chart below. Include a separate entry for each unit type according to its square foot/age and/or sales price/rent.

Type of Unit	# of Units	# of Bdrms	# of Baths	Gross Sq. Ft.	# of Parking Spaces	Sales Price/ Rent	Condo Fee	Handicap Accessible
Affordable								□ #
								□ #
								<pre> # </pre>
								□ #
Market								□ #
								□ #
								□ #
								□ #
Other								□ #
								□ #

VI.	SITE INFORMATION						
1.	Total Acreage Total Buildable Acreage						
2.	Describe the current and prior uses of the subject site:						
	ting buildings on site? Yes ☐ No ☐ s, describe plans for these buildings:						
3.	Current Zoning Classification:						
	Residential (minimum lot size)						
	Commercial Industrial Other						
4.	Does any portion of the site contain significant topographical features such as wetlands?						
	Yes 🗌 No 🗌 If yes, how many acres are wetlands?						
	If yes, attach map of site noting wetland areas. Is map attached? Yes No						
5.	Is the site located within a designated flood hazard area?						
	Yes 🗌 No 🗍 If yes, please attach a map of the site with flood plain designations. Is map attached? 🗍 Yes 🔲 No						
6.	Is the site or any building located on the site listed, nominated or eligible for listing on the National Register of Historic Places? Yes 🗌 No 🗌						
7.	Is the site within a Historic District? Yes I No I III No IIII No IIII IIII IIII NO IIIIIIIIII						
8.	In the past three years, have there been any defaults on any mortgage on the property or any other forms of financial distress?						
	Yes 🗌 No 🗌 If yes, please explain:						

9. Indicate which utilities are available to the site:

	Public Sewer Private Septic Public Streets Public Water Private Wells Private Ways Natural Gas Electricity Private Ways On-site Sewer Treatment Facility Other Explain:						
10.	Describe any known or suspected hazardous waste sites on or within a $\frac{1}{2}$ mile radius of the project site.						
11.	Has a 21E hazardous waste assessment ever been done on this site? If so, attach a summary of the filing.						
12.	What waivers will be requested under the comprehensive permit?						
13.	Describe the current status of site control and attach copies of relevant deeds or executed agreements.						
	A. Owned by Developer						
	B. Under Purchase and Sale Agreement						
	C. Under Option						
Seller:	Buyer:						
Is there	e an identity of interest between the Buyer and Seller? If yes, please explain:						
Date o	f Agreement Expiration Date						
Extens	ions granted? Yes 🗌 No 🗌 Date of Extension						
Purcha	se Price \$						

VII. DESIGN AND CONSTRUCTION

1. Drawings

Please submit one set of drawings.

Cover sheet showing written tabulation of:

- Proposed buildings by design, ownership type, and size. Identity and describe affordable units and handicapped accessible units.
 - Dwelling unit distribution by floor, size, and bedroom/bath number
 - Square footage breakdown of commercial, residential, community, and other usage in the buildings
- Number of parking spaces

Site plan showing:

- Lot lines, streets, and existing buildings
 - Proposed building footprint(s), parking (auto and bicycle), and general dimensions
- Zoning restrictions (i.e., setback requirements, easements, height restrictions, etc).
- Wetlands, contours, ledge, and other environmental constraints
- Identification of affordable units
- Identification of handicapped accessible units.
- Sidewalks and recreational paths
- Site improvements, including landscaping
- Flood plain (if applicable)

Utilities plan showing:

Existing and proposed locations and types of sewage, water, drainage facilities, etc.

Graphic depiction of the design showing:

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Typical building plan

Typical unit plan for each unit type with square footage tabulation

- Typical unit plan for each accessible unit type with square footage tabulation
- Elevation, section, perspective, or photograph
- Typical wall section

2. Construction Information

	Foundations	# Mkt. Units	# Aff. Units	Attic	# Mkt. Units	# Aff. Units
	Slab on Grade Crawl Space Full Basement			Unfinished Finished Other		
	Exterior Finish	# Mkt. Units	# Aff. Units	Parking	# Mkt. Units	# Aff. Units
	Wood Vinyl Brick Fiber Cement Other			Outdoor Covered Garage Bicycle		
<u>Heating</u>	<u>g System</u>					
Fuel:	🗌 Oil	🗌 Gas	🗌 Ele	ectric	Other	
Distribu	tion method (air, w	/ater, steam, et	ic.):			

Energy Efficient Materials

Describe any energy efficient or sustainable materials used in construction:

Modular Construction

If modular construction will be used, explain here:

Amenities

Will all features and amenities be available to market buyers also be available to affordable buyers? If not, explain the differences.

VIII. SURROUNDING AREA

1. Describe the land uses in the surrounding neighborhood:

2. What is the prevailing zoning in the surrounding neighborhood?

3. How does the project's proposed site plan and design relate to the existing development pattern(s) of the immediately surrounding area?

4. Describe and note distances to nearby amenities and services such as shopping, schools, parks and recreation, or municipal offices.

5. Explain how developing the site contributes to smart growth development in the area (e.g. mixed use, reuse, concentrated development).

6. Is the site located near public transit (bus, subway, commuter rail, etc.)? If so, indicate the type, distance to the nearest stop, and frequency of service.

IX. FINANCING

1. Attach a letter of interest from a construction lender.

Are there any public funds to be used for this project? If yes, indicate the source, amount, use and status of funds:

Describe the form of financial surety to be used to secure the completion of cost certification for this project

X. PROJECT FEASIBILITY

The section is for developers of home ownership projects.

Developers of multi-family rental projects must use the One Stop Application at <u>http://www.mhic.com</u> and complete Section 3 Sources and Uses and Section 4 Pro Forma.

Ownership Pro Forma

		Total Costs	Per Unit	Per Sq. Ft.	% of Total
(a)	Site Acquisition	\$	\$	\$	\$
Hard	Costs:	\$	\$ \$ \$	\$	\$
	Earth Work	\$	\$	\$	<u>\$</u> \$
	Site Utilities	\$	\$	\$	\$
	Roads & Walks	\$	\$	\$	\$
	Site Improvement	\$	\$		\$
	Lawns & Planting	\$	\$	\$	\$
	Demolition	\$	\$ \$ \$	\$ \$ \$	\$
	Unusual Site Conditions	\$	\$	\$	\$
(b)	Total Site Work	\$	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	\$	\$
()	Concrete	\$	\$	\$	\$
	Masonry	\$	\$	\$	\$
	Metals	\$	\$	\$	\$
	Carpentry	\$	\$	<u>\$</u> \$	\$
	Roofing & Insulation	\$	\$	\$	\$
	Doors & Windows	\$	\$	\$	\$
	Interior Finishes	\$	\$	\$	\$
	Cabinets & Appliances	\$	\$	\$	\$
	Plumbing & HVAC	\$	\$	\$	
	Electrical	\$	\$ \$ \$ \$ \$ \$ \$ \$ \$	\$	<u>\$</u>
(C)	Total Construction	\$	\$	\$	\$
(d)	General Conditions	\$	\$	\$	\$
(e)	Subtotal Hard Costs				
.,	(a+b+c+d)	\$	\$	\$	\$
(f)	Contingency	\$	\$	\$	\$
(g)	Total Hard Costs (e+f)	\$	\$	\$	\$

Soft Costs:	\$	<u>\$</u>	\$	<u>\$</u>
Permits/Surveys	\$	\$	\$	\$
Architectural	\$	\$	\$	\$
Engineering	\$	\$	\$	\$
Legal	\$	\$	\$	\$
Bond Premium	\$	\$	\$	\$
Real Estate Taxes	\$	\$	\$	\$
Insurance	\$	\$	\$	\$
Security	\$	\$	\$	\$
Developer's Overhead	<u>\$</u> \$	\$	\$	\$
General Contractor's	<u> </u>	<u>.</u>	<u>.</u>	<u> </u>
Overhead	\$	\$	\$	\$
Construction Manager	\$	\$	\$	\$
Property Manager	\$	\$	\$	\$
Construction Interest	\$	\$	\$	\$
Financing/Application Fees	\$	\$	\$	\$
Utilities	\$	\$	<u>\$</u> \$	\$
Maintenance (unsold units)	<u>\$</u> \$	\$	\$	\$
Accounting	\$	\$	\$	\$
Marketing	\$		\$	\$
(h) Subtotal Soft Costs	\$	<u>\$</u>	\$	\$
(i) Contingency	\$	\$	\$	\$
(j) Total Šoft Čosts (h+i)	\$	\$	\$	\$
(k) Total Development Costs	<u> </u>	<u> </u>	<u> </u>	<u> </u>
(g+j)	\$	<u>\$</u>	<u>\$</u>	<u>\$</u>

Profit Analysis (should conform to the pro forma)

Sources:

Affordable projected sales \$ Market sales \$ Public grants \$ (A) Total Sources \$ Uses: Construction Contract Amount (B) Total Development Costs Profit: (C) Total Profit (A-B) \$_____ (D) Percentage Profit (C/B) \$____ Cost Analysis (should conform to the pro forma) **Total Gross Building Square Footage** Residential Construction Cost per Sq. Ft. \$ Total Hard Costs per Sq. Ft. \$ Total Development Costs per Sq. Ft. \$_____ Sales per Sq. Ft. \$_

(do not include proceeds from public grants)

XI. DEVELOPMENT SCHEDULE

Complete the chart below by providing the appropriate month and year. Fill in only as many columns as there are phases. If there will be more than three phases, add columns as needed.

	Phase 1	Phase 2	Phase 3	Total
Number of affordable units Number of market units				
Total by phase				
• •				

Please complete the following chart with the appropriate projected dates:

	Phase 1	Phase 2	Phase 3	Total
All permits granted				
Construction start Marketing start – affordable units				
Marketing start – market units				
Construction completed				
Initial occupancy				

XII. MARKETING OUTREACH AND LOTTERY

Affirmative Fair Housing Marketing Plan:

Please submit your Affirmative Fair Housing Marketing Plan (AFHMP), prepared in accordance with Section III of the 40B Guidelines, and a description of the lottery process that will be used for this project. This shall describe:

- Information materials for applicants that will be used that provides key project information;
- Eligibility requirements;
- Lottery and resident selection procedure;
- Any preference system being used (Note: if local preference is proposed for this project, demonstration of the need for local preference must be demonstrated and accepted by HLC);
- Measures to ensure affirmative fair marketing including outreach methods;
- Application materials that will be used; and
- Lottery Agent.

XIII. CHECKLIST OF ATTACHMENTS

The following documentation must accompany each application:

- 1. Letter of support signed by Chief Elected Officer of municipality
- 2. Letter of support from local housing partnership (if applicable)
- 3. Signed letter of interest from a construction lender
- 4. Map of community showing location of site
- 5. Check payable to HLC
- 6. Rationale for calculation of affordable purchase prices or rents (see Instructions)
- 7. Copy of site control documentation (deed or Purchase & Sale or option agreement)
- 8. 21E summary (if applicable)
- 9. Dependence of existing building(s) and/or site
- 10. Site Plan showing location of affordable units
- 11. Sample floor plans and/or sample elevations
- 12. Proposed marketing and lottery materials

N. B.: Appraisal: HLC will commission an appraisal, for which the sponsor of the project will pay. We will not issue a Project Eligibility Letter until that appraisal has been completed and accepted by HLC.