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 rieko.hayashi@mass.gov.

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

Application Contents:

l.	General Information	VIII.	Surrounding Area
II.	Community Support	IX.	Financing
III.	Municipal Contact Information	Χ.	Project Feasibility
IV.	Development Team	XI.	Development Schedule
V.	Project Information	XII.	Marketing Outreach and Lottery
VI.	Site Information	XIII.	Checklist of Attachments
VII.	Design and Construction		

January 2016

MASSACHUSETTS

Department of Housing & Community Development Local Initiative Program Application for Comprehensive Permit Projects

	GENE	RAL INFORMATION	
		of Development:	
	1.	Type of Housing: Single Family house Condominium	☐ Rental ☐ Age Restricted
	2.	Project Characteristics: ☐ New Construction ☐ Cor ☐ Rehabilitation	nversion Other
	3.	Total Acres Densit	y of Project (units/acre)
	4.	Unit Count:	
		Total Number of Units Market Rate \$ Affordable \$	
	5.	Unit Prices/Rents: Market Rate \$ Affordable \$	
Compr Chief E	ehensiv	natures for the ve Permit Project Application ve Official v:	Chair, Local Housing Partnership (if applicable):
Signatı	ure:		Signature:
Print N	ame: _		Print Name:
Date:			Date:

II. COMMUNITY SUPPORT

	1.	Letter of Support from Municipality - 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
provid	ing supp	ort, and how the development team has addressed any concerns the community
has. 1	he lette	r 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.	Local Contributions - Check off all that apply and provide a brief description at
the end	d.	
	D D D D D D D D D D D D D D D D D D D	Land donation (dollar value) Building donation (dollar value) Marketing assistance Other work by local staff 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 s only) Other (specify)
	Briefly	explain the contributions:
housin	g plan) ible hou	Municipal Actions and Local Plans - Briefly describe how the project fits with any community has done (e.g. master plan, community development plan, affordable and other local land use and regulatory actions that provide the opportunity for using (including multi-family and overlay districts, inclusionary zoning by-laws and

III. MUNICIPAL CONTACT INFORMATION

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

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 Consultant** Name Address Phone Email Tax ID Marketing/Lottery Agent Name Address Phone Email Tax ID

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. Devel	oper:			
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. Contra	actor:			
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 #:				
Have and/o	other subsidizing a	rs of your team had preagencies? Yes	evious Chapter 40B exp No	
	uptcy / Foreclosure		l for hankwinter, or ha	

lf	yes, pleas	e explain.					
_							
_							·
DEVELO	PER CERT	IFICATION	Al .				
DEVELO	IF LIX OLIVII	II ICATION	•				
			certifies that _ (Legal Name of				
			_ (Legal Name of				
informati	on containe	d in this a	application is true	and corr	ect to the b	est of his/her	knowledge.
			agrees to execute profit corporation				
			orting requiremen				
in the LIF	² Guidelines	·-					
Signatur	e of Develop	er					
Drint Nov							
Print Nar	ne:						
Date							

٧. **PROJECT INFORMATION** 1. Type of Housing: Total Number of Units Single-Family House Condo Rental Other Affordable Market 2. Total Number of Units 3. Project Style: Total Number of Units Detached single-family house Rowhouse/townhouse Duplex Multifamily house (3+ family) Multifamily rental building Other (specify) Is this an age-restricted (55+) Development? Yes 4. No 🗌 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 _____ 6. 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.

How will this development follow Sustainable Development Principles?

How will the project maximize energy efficiency and meet Energy Star

A.

B.

Standards?

A.	Have you ever applied for a project eligibility letter involving any portion of site, or are you aware of any prior application for a project eligibility letter
☐ Ye	involving any portion of the site?
В.	Has the municipality denied a permit on another proposal for this site with last 12 months?
Outsta	anding Litigation

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								
								□ #
								□ #
Market								□ #
								□ #
								□ #
								□ #
Other								□ #
								□ #

VI.	SITE INFORMATION
1.	Total Acreage Total Buildable Acreage
2.	Describe the current and prior uses of the subject site:
	ing 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 \square No \square
7.	Is the site within a Historic District? Yes \(\square\) No \(\square\) If yes, describe the architectural, structural and landscape features of the area:
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						
10.	Describe any known or suspected hazardous waste sites on or within a ½ 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. ☐ Yes ☐ No						
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.						
	B. Under Purchase and Sale Agreement						
	C. Under Option						
Seller:	Buyer:						
Is ther	e an identity of interest between the Buyer and Seller? If yes, please explain:						
Date o	of Agreement Expiration Date						
Extens	sions granted? Yes No Date of Extension						
Purcha	ase 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: 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 Informatio

	Foundations	# Mkt. Units	# Aff. Units	Attic	# Mkt. Units	# Aff. Units
	Slab on Grade Crawl Space Full Basement	<u> </u>		Unfinished Finished Other	<u></u>	
	Exterior Finish	# Mkt. Units	# Aff. Units	Parking	# Mkt. Units	# Aff. Units
	Wood Vinyl Brick Fiber Cement Other			Outdoor Covered Garage Bicycle		
<u>Heating</u>	Heating System					
Fuel:	Oil	Gas	☐ Ele	ectric	Other	
Distribution method (air, water, steam, etc.):						
Energy Efficient Materials Describe any energy efficient or sustainable materials used in construction: Modular Construction If modular construction will be used, explain here:						
	ies features and am ble buyers? If not,			rket buyers a	ılso be availa	ble to

VIII. SURROUNDING AREA

	1.	Describe the land uses in the surrounding neighborhood:
	2.	What is the prevailing zoning in the surrounding neighborhood?
3.		does the project's proposed site plan and design relate to the existing development the immediately surrounding area?
4.		cribe and note distances to nearby amenities and services such as shopping, rks and recreation, or municipal offices.
5. (e.g		ain how developing the site contributes to smart growth development in the area use, reuse, concentrated development).
6. the		e site located near public transit (bus, subway, commuter rail, etc.)? If so, indicate stance to the nearest stop, and frequency of service.
IX.	FINA	ANCING
1.	Atta	ch a letter of interest from a construction lender.
		ny public funds to be used for this project? If yes, indicate the source, amount, use of funds:
		·
	cribe the	e form of financial surety to be used to secure the completion of cost certification for

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 http://www.mhic.com 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> \$	<u>\$</u> \$
	Site Utilities	\$	\$	\$	\$
	Roads & Walks	\$	\$	\$	\$
	Site Improvement	<u>\$</u> \$	\$ \$ \$	\$ \$ \$	<u>\$</u> \$ \$
	Lawns & Planting				\$
	Demolition	\$	\$	\$ \$ \$	\$
	Unusual Site Conditions	\$	<u>\$</u> \$	\$	<u>\$</u> \$ \$
(b)	Total Site Work	\$			\$
	Concrete	\$	\$	\$	\$
	Masonry	\$	\$ \$ \$ \$	\$ \$ \$	<u>\$</u> \$ \$
	Metals	<u>\$</u> \$	\$	\$	\$
	Carpentry	\$	\$	\$	\$
	Roofing & Insulation	\$	<u>\$</u> \$	\$	<u>\$</u> \$
	Doors & Windows	\$		\$	\$
	Interior Finishes	\$	\$	\$	\$
	Cabinets & Appliances	\$	\$ \$ \$	\$ \$	<u>\$</u> \$ \$
	Plumbing & HVAC	\$	\$	\$	\$
	Electrical	\$	\$	\$	\$
(c)	Total Construction	<u>\$</u>	\$ \$ \$	\$ \$	\$ \$ \$
(d)	General Conditions	\$	\$	\$	\$
(e)	Subtotal Hard Costs				
	(a+b+c+d)	\$	\$	\$	\$
(f)	Contingency	\$	\$ \$	\$	\$ \$
(g)	Total Hard Costs (e+f)	<u>\$</u>	\$	<u>\$</u>	\$

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

Sources:			
many eded.			
II — —			
1			

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.		Photographs 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.