

WestMetro HOME Consortium

FY20/FFY19 (HM20) Request for Proposals

Available Funding

The WestMetro HOME Consortium anticipates that following funding will be available under this Request for Proposals:

\$421,281.10	HM20 Entitlement (EN) Consolidated Funds Pool
\$214,686.90	HM20 CHDO Set-Aside (CR)*

Deadline for Submission of Proposals

Proposals for all funds must be submitted to the contact no later than

Tuesday, October 22, 2019 at 5:00 PM.

Electronic versions are preferred

*CR funds are set aside for projects sponsored by *certified* Community Housing Development Organizations (“CHDOs”). See RFP for additional information regarding the allocation of HM20 CR funding.

Contact Information

Eamon Bencivengo, Housing Development Planner
Phone: 617.796.1145 email: ebencivengo@newtonma.gov

mailing address:

WestMetro HOME Consortium
c/o Newton Planning & Development Department
City of Newton
1000 Commonwealth Avenue
Newton, MA 02459

To All Interested Parties:

The general purpose of the HOME Investment Partnerships Program (HOME) is to enable local governments to increase the supply of affordable housing by strengthening public-private partnerships. The multi-year program may provide funds for acquisition, rehabilitation, and new construction of either rental or homeownership housing for low and very low-income households.

The WestMetro HOME Consortium (“Consortium”), through the City of Newton (“Representative Member”) anticipates having the following funding available: \$421,281.10 HM20 HOME (EN) and \$214,686.90 HM20 CHDO Set-Aside (CR). Only projects sponsored by certified Community Housing Development Organizations (“CHDO”) may apply for the CR funds. Please see the Request for Proposal Schedule for detailed information regarding allocation of the HM20 CR funding.

All proposed projects must meet three threshold requirements:

1. **Location** - all projects must be located within the geographic boundaries of the Consortium, which is comprised of the towns of Bedford, Belmont, Brookline, Concord, Lexington, Natick, Needham, Sudbury, Watertown, Wayland and the cities of Framingham, Newton and Waltham (“Member Communities”).
2. **Member Community Support** - all project sponsors/owners must work with their Member Community to submit an application. Member Community staff will assist organizations in evaluating project eligibility and can be contacted for technical assistance at any time before the application deadline. All applications must be signed by the chief elected official of the Member Community and the Member Community must then submit the application for the available consolidated HOME funds to the Representative Member.
3. **Submission Requirements** – All applications must meet minimum submission requirements as evidenced by a completed checklist and inclusion of all application materials (see Section V. Submission Checklist)

Enclosed is the Consortium’s RFP which contains detailed information as follows: anticipated schedule; evaluation of proposals; HOME Program requirements; proposal application and submission requirements; evaluation criteria; and pertinent attachments.

Proposals must comply with the requirements detailed in this RFP to be eligible for consideration. If any changes to the RFP are made, or addenda issued, they will be emailed to each Member Community and posted online at:

http://www.newtonma.gov/gov/planning/hcd/westmetro_home_consortium/default.asp

Table of Contents

I.	Introduction	4
II.	Request for Proposals Schedule	4
III.	Evaluation of Proposals	5
IV.	HOME Program Requirements	5
V.	Submission Checklist & Application	11
VI.	Evaluation Criteria	17
VII.	Project Scoring System	20
VIII.	Reservation of Rights	21
IX.	Questions / Addenda	21
X.	Required Additional Forms and Appendix	21
	a.	Certificate of Non-Collusion
	b.	Certificate of Tax Compliance
	c.	Certificate of Section 3 Business Concern
	d.	Certificate of Section 3 Resident
	e.	WestMetro HOME Consortium Property Standards Policy – 3/5/2019

I. Introduction

The WestMetro HOME Consortium (“Consortium”) is seeking requests for funding for affordable housing projects within the Consortium’s boundaries. HOME funds may be used for eligible activities related to the acquisition, construction or rehabilitation of rental or homeownership housing projects for low and very low-income households. All projects must comply with all U.S. Housing and Urban Development’s (HUD) HOME Investment Partnerships Program (HOME) requirements found at 24 CFR Part 92. HOME-assisted units must be rented or sold to households whose gross annual income is no greater than eighty percent (80%) of the Area Median Income (AMI), adjusted for household size and **at least 90% of those beneficiaries must be low income persons/households (60% of AMI)**. Note that only projects sponsored by Community Housing Development Organizations (“CHDO”) are eligible for the CR funding.

II. Anticipated RFP Schedule

All meetings will be held in Newton City Hall, 1000 Commonwealth Avenue, Newton, MA

September 24, 2019	RFP Issued – emailed to Consortium Members and available online
October 22, 2019	5:00 p.m. - Deadline for all proposals*
Week of Oct. 22, 2019- Oct. 30, 2019	Project Review Committee (PRC) to meet to review proposals
November 7, 2019	Consortium Council Meeting - Council vote on PRC’s allocation recommendations.

Applications must be signed by the chief elected official of the Member Community and be submitted by the Member Community to the Representative Member, who will then distribute the Applications to the Project Review Committee for review.

An electronic version (PDF’s only) of the proposal must be received by the City of Newton via-email no later 5:00 p.m. on Tuesday, October 22, 2019. Electronic versions are preferred, but an unbound paper copy will also be accepted. Applications should be submitted to the following:

Eamon Bencivengo, Housing Development Planner
 Phone: 617.796.1145 email: ebencivengo@newtonma.gov
 WestMetro HOME Consortium
 c/o Newton Planning and Development Department
 1000 Commonwealth Avenue
 Newton, MA 02459

* In the event that HM20 CR funds are not allocated as part of the initial RFP process, funding proposals for CHDO sponsored projects will be accepted and evaluated on a first-come first serve basis. HM20 CR funds uncommitted by 7/30/2020 will be rolled-over into the HM21 WestMetro HOME Consortium RFP but will remain as CR funds and restricted to CHDO sponsored projects.

III. Evaluation of Proposals

HOME funds will be awarded to the most advantageous Proposal(s), as determined by the WestMetro HOME Consortium Council. The selection process will be conducted in three phases:

1. **Initial pre-qualification of proposals:** All proposals will be reviewed by the Representative Member and will be evaluated on whether the proposal meets minimum threshold requirements (Location, Member Community Support and Complete Submission Requirements). All applicants will be notified of proposal status identifying any missing items or deficiencies in proposals. Applicants will be given at least 7 days to respond. After that deadline, any incomplete proposal or proposals not meeting minimum threshold criteria will be considered non-responsive and will be eliminated from consideration.
2. **Project Review Committee:** Proposals that are pre-qualified as to meeting the threshold requirements will then be reviewed by the Project Review Committee, which is comprised of municipal planning or housing and community development professionals from five of the Member Communities. Each proposal will be reviewed for responsiveness to the **Evaluation Criteria (Section VII)** and **Project Scoring (Section VIII)**. Each Project Review Committee member will assign a rating of Highly Advantageous, Advantageous, Not Advantageous or Unacceptable to each evaluation criterion. Based on these evaluation criteria, a composite rating will be created for each proposal by combining the individual ratings.
3. **Consortium Council Vote:** The Project Review Committee will make a slate of recommendations to the WestMetro HOME Consortium Council as to which proposal(s) is most advantageous based on the composite ratings. The Consortium Council will make the final funding decision through a majority vote. The Representative Member will then notify each Applicant and issue award letter(s). Next steps for awardees will at a minimum include completion of a HOME environmental review, final project underwriting, and possibly, public hearing approvals.

IV. HOME Program Requirements

The full HOME Program Requirements are found at 24 CFR Part 92.

4.1. Eligible Applicants

Applicants may be for-profit or non-profit developers, Community Housing Development Organizations (“CHDO”) and public agencies.

4.2. CHDO Set-Aside (CR) Funds

CHDOs may develop, own, and sponsor either rental housing or owner-occupied housing. Only projects sponsored by CHDOs may apply for the CHDO Set-Aside (CR) funding. For the purposes of this RFP, applicants must also provide evidence of Member Community support (see Section VI for more information).

4.3. Eligible Activities

Eligible activities include acquisition, moderate rehabilitation, substantial rehabilitation, new construction projects, or conversion of a vacant or under-used commercial or industrial building to residential use. Mixed-income and mixed-use buildings are also eligible, but no HOME funds may be used for any costs other than those for affordable housing units.

4.4. Ineligible Activities

Ineligible uses of HOME funds include: providing project reserve accounts, supplement rental assistance of the existing section 8 program, provide non-federal matching contributions, provide assistance for uses authorized under Section 9 of the Housing Act of 1937, assist previously HOME-assisted projects after one year of project completion, pay delinquent taxes or fees on properties, pay for the acquisition of properties owned by a Member Community.

4.5. Eligible Properties

Proposals may be for townhomes, duplexes, apartment complexes/multi-family buildings, cooperatives, condominiums and clustered or scattered-site single homes. Properties that at any time received or are currently receiving capital or operating assistance promulgated by the federal Housing Act of 1937 are not eligible.

4.6. Eligible Project Costs

HOME may subsidize all reasonable, justifiable and necessary development costs, including: *Hard costs:* acquisition of property; site improvements; demolition; rehabilitation; and construction.

Soft costs: architectural and engineering fees; cost estimating fees; loan origination and processing fees; appraisal and credit report fees; legal and accounting costs; title and recording fees; relocation costs; marketing costs; and developer fees.

4.7. Income Limits

The following income limits are for the Boston-Cambridge- Quincy Metropolitan Statistical Area and are based on percentages of area median income (AMI), with adjustments made for household size: *(Income limits current as of June 2019 and are subject to change.)*

FY 2019 Income Limits Summary - Boston-Cambridge-Quincy Metropolitan Statistical Area						
Income Level	Household Size					
	1	2	3	4	5	6
30% AMI	\$24,900	\$28,450	\$32,000	\$35,550	\$38,400	\$41,250
50% AMI	\$41,500	\$47,400	\$53,350	\$59,250	\$64,000	\$68,750
60% AMI	\$49,800	\$56,880	\$64,020	\$71,100	\$76,800	\$82,500
80% AMI	\$62,450	\$71,400	\$80,300	\$89,200	\$96,350	\$110,650

4.8. Property Standards –

All projects must comply with HOME Program Regulations 24 CFR 92.251

New construction projects must meet, at a minimum, Section 8 Housing Quality Standards, local building codes, ordinances, zoning requirements and the design and construction standards of Section 504 of the Rehabilitation Act of 1973, the Fair Housing Act and Titles II and III of the Americans with Disabilities Act, as applicable. New construction must meet the model energy code for “Energy Star Qualified New Homes,” published by the Environmental Protection Agency.

Rehabilitation projects must meet applicable local building codes, address deficiencies to major systems, including structural support; roofing; weatherproofing; plumbing; electrical; and heating, ventilation and air conditioning. Rehabilitation work must also immediately address life-threatening deficiencies if the housing is already occupied (e.g., lead paint abatement if child six or under has a documented elevated blood level, no hot running water, blocked plumbing, broken boiler, or presence of mold). At a minimum, each of the Project’s major systems must have a useful life that exceeds the affordability period.

All projects must also meet the requirements of the new WestMetro HOME Consortium Construction Standards Policy updated 3/5/2019 (included in Appendix), which includes updated Property Standards

4.9. Affordability Period

Projects must maintain compliance with HOME regulations for not less than the minimum period as specified in the following table:

ACTIVITY	AFFORDABILITY PERIOD
Rehabilitation, less than \$15,000 HOME funds per unit	5 Years
Rehabilitation, \$15,000 to \$40,000 HOME funds per unit	10 Years

Rehabilitation, more than \$40,000 HOME funds per unit	15 Years
New Construction or acquisition of newly constructed housing	20 Years

Note: An Applicant may specify a HOME Affordability Period that extends beyond the HOME minimum requirement. The election to do so must be indicated in the application.

4.10. Subsidy Limits

HUD sets limits on the amount of HOME funds that can be used for Projects on a per-unit basis. The minimum HOME Allocation is One Thousand Dollars (\$1,000). The Maximum HOME Per-Unit allocations are as follows:

0 Bedroom	1 Bedroom	2 Bedroom	3 Bedroom	4+ Bedroom
\$147,074.00	\$168,600.00	\$205,018.00	\$265,229.00	\$291,137.00

Figures are as of 6/4/2018 and are subject to change.

4.11. Environmental Review, Accessibility and other required regulations

Projects must comply with environmental review and release of funds requirements, the federal Lead Paint Rule and the Massachusetts Lead-Based Paint Poison Prevention Act, Davis-Bacon Wage Rates, the Fair Housing Act, Uniform Relocation Act, Section 504 of the Rehabilitation Act of 1973, and Section 3 of the Housing and Urban Act of 1968 (Section 3) requirements, as applicable. HOME funds may not be used for any hard costs (direct construction, site work, etc.) prior to the environmental review being complete. Project owners and sponsors must not undertake any *Choice Limiting Actions* until HUD environmental clearance is achieved. These actions include acquisition, site clearance/improvements, leasing, construction or rehabilitation.

5. Homeownership Projects

5.1. Income Limits for Target Beneficiaries

The beneficiaries of the project must be households whose income is at or below 80% of Boston-Cambridge-Quincy Area Median Income (AMI), adjusted for household size.

5.2. Affordability Standards

The housing affordability standards of the HOME-assisted units must meet either the Commonwealth of Massachusetts Department of Housing and Community Development (DHCD) affordability calculations or the Member Community’s own affordability standards.

5.3. Property Standards

At a minimum, each of the Project’s major systems must have a useful life of 5 years. All projects must also meet the requirements of the new WestMetro HOME Consortium Construction Standards Policy updated 3/5/2019 (included in Appendix), which includes updated Property Standards.

5.4. Deed Restrictions

Units developed under the HOME Program as HOME assisted units will be subject to a deed restriction. The term of the deed restriction will appertain to the Member Community’s policy of resale or recapture.

5.5. Sale Price Limitations

The sale price to the buyer may not exceed the maximum price limitations set forth by the HOME Program. These FY 2019 limits are as follows:

UNIT SIZE	PRICE LIMITATION
1 Unit	\$407,000
2 Unit	\$520,000
3 Unit	\$630,000
4 Unit	\$780,000

6. Rental Projects

6.1. Rent Restrictions

HUD provides the following maximum HOME rent limits, which are adjusted on an annual basis according to housing market conditions:

6.1.1. The "high" HOME rent is the lesser of the HUD Fair Market Rent or 30% of adjusted gross income, based on 65% of median income. This rent is minus allowances for any tenant-paid utilities. If utilities are not included in the rent, the applicant must subtract a utility allowance from the rents below. The utility allowance must be approved by the member community.

6.1.2. The "low" HOME rent is equal to 30% of annual income, assuming that income is 50% of median, minus allowances for any tenant-paid utilities.

2019 HOME Program Maximum Rents			
Bedroom Size	Fair Market Rent	Low HOME Rent	High HOME Rent
Efficiency	\$1608	\$1037	\$1329
1 Bedroom	\$1801	\$1111	\$1425
2 Bedroom	\$2194	\$1333	\$1712
3 Bedroom	\$2749	\$1540	\$1970
4 Bedroom	\$2966	\$1718	\$2178
5 Bedroom	\$3411	\$1896	\$2384
6 Bedroom	\$3856	\$2073	\$2591

6.1.3. If the unit receives Federal or State project-based rental subsidy and the very low-income family (< 50% AMI; Low HOME) pays as a contribution toward rent not more than 30 percent of the family’s adjusted income, then the maximum rent (i.e., tenant contribution plus

project-based rental subsidy) is the rent allowable under the Federal or State project-based rental subsidy program.

6.2. Eligible Occupants and Income Targeting

Ninety percent (90%) of the HOME-assisted units in the project must be targeted to tenants with incomes at or below 60% of AMI. The remaining 10% of HOME-assisted units must be targeted at those with incomes under 80% of AMI. Furthermore, for developments with 5 units or more, at least 20% of HOME-assisted units must be occupied by households with incomes at or below 50% of AMI. Households must be income verified using HUD's "Part 5 Definition" method of income determination.

6.3. Property Standards

The Project's major systems must have a useful life equal to the HOME Affordability Period, or a replacement reserve deposit sufficient to assure adequate maintenance of major systems throughout the Affordability Period.

All projects must also meet the requirements of the new WestMetro HOME Consortium Construction Standards Policy updated 3/5/2019 (included in Appendix), which includes updated Property Standards

6.4. Deed Restrictions

A deed restriction will be in effect for at least the HOME Affordability Period in order to enforce the HOME Funding Agreement, which will be signed between the project owner and the Member Community where the project is located. The HOME Funding Agreement will describe the rent restrictions, income eligibility requirements, the duration of the HOME Affordability Period and other HOME requirements and project-specific information.

6.5. Term of Loan

Generally, awards will be provided as a deferred payment, forgivable loan with a term of 30 years, at the discretion of the Member Community as HOME regulations permit. During the HOME Affordability Period, the affordability requirements will remain in effect regardless of a transfer occurs or the loan is repaid during the term. The loan must be repaid if any of the terms and conditions of the loan are violated.

6.6. Interest Rate

Generally, the HOME loan is 0% with no monthly payments required. For projects receiving federal or state Low Income Housing Tax Credits, if a 0% interest rate is infeasible for tax credit underwriting purposes, the interest rate on the HOME funds will be the Applicable Federal Rate at the time of closing. Interest rate shall be determined by the Member Community as HOME regulations permit.

V. Proposal Submission Checklist and Application

The proposal must include the following submission items identified on the checklist, as applicable, in order to be considered responsive and evaluated by the WestMetro HOME Consortium:

Application Instructions are included in appendix

Required for	Check if included	WESTMETRO HOME CONSORTIUM APPLICATION CHECKLIST
APPLICATION		
All Proposals		Application
DEVELOPER INFORMATION & QUALIFICATIONS		
All Proposals		Organization mission , including how this project fits mission
		Previous similar projects completed and capacity to undertake project
		Owned Rental Real Estate Schedule , including occupancies, compliance status and cash flows
		Most recent audited organizational annual financial statement
		Most recent annual organizational operating budget
Nonprofits		Statement of good standing with WestMetro HOME Consortium (Applicants with unresolved compliance findings with the Consortium will be considered nonresponsive)
		Description of board of directors : including skills, experience, tenure & affiliations
CHDO		Copy of articles or organization, by-laws and 501(c)(3) letter
For-profit		Copy of current CHDO certification from WestMetro HOME Consortium
		Corporate organizational document(s) , identifying owner and/or general partner
DEVELOPMENT TEAM INFORMATION		
All Proposals		Resumes of key development team members
		Contact information (for GC, architect, engineer, management agent, attorney, consultant(s))
PROJECT INFORMATION		
All Proposals		Evidence of site control (legally binding option, purchase & sale agreement or deed)
		Letter of project support , signed by chief planning official, or chief elected official, if no such chief planning official exists
		Zoning and permitting requirements and schedule
		Map or narrative describing site size, topography, current use
		Context map , identifying proximity to roads, transit, municipal and health facilities, amenities
		Color photos (5 to 10), of site and its surroundings
		Brief property history , including prior uses, owner(s) and occupancy
		Phase 1 Environmental Site Assessment
		Environmental mitigation plan , including lead paint, asbestos, underground tanks
		Preliminary site plan
	Itemized scope of work & cost estimates (may be submitted as part of detailed development budget)	

		Schedule of unit types , by square footage, affordability tier(s), number of bedrooms and bathrooms, accessibility type, amenities provided
		Timeline , including milestones identified in Proposal Submission Requirements section
		Description of sustainability design elements
		Description of site/common area accessibility improvements
		Market Analysis: including prevailing/trending rents or prices, demand & target population; may be conducted by Applicant
New construction		Detailed floor plans, elevations
As needed		Affirmative Fair Housing Marketing Plan , if 5 or more HOME-assisted units
		Plan and budget for temporary or permanent relocation , if there are existing tenants
		Other approvals: Response letter(s) from Conservation or Historical Commission, Mass. Historical Commission, Mass. Architectural Access Board, etc.
		Capital needs assessment for multifamily rehabilitation of ≥ 26 units
		Commitment to perpetual affordability, or otherwise greater than HOME requirements
Tax credit projects		Market Analysis: must be conducted by third party professional
PROJECT FINANCES -		
All		Source and Uses Schedule;
		Development Budget , including itemized hard and soft costs
		Letters of Financial Commitment , from all sources including terms and conditions
		Non-HOME funding: sources, commitment letters or application/decision schedules www.mhic.com/onestop_downloads.cfm
Rental		Stabilized Operating Budget
		Long-term Pro Forma , covering the entire HOME Period of Affordability
		Project Based Rental subsidy, if any: sources, commitment letters or application/decision schedules
Ownership		Cost of ownership analysis: including proposed sales prices, owners’ estimated total housing costs, based on DHCD or Member Community standards
		Condo Association Budget , including % beneficial interest assigned to affordable units
Tax Credit Projects		Limited Partnership Agreement , or letter of interest
ATTACHMENTS (Included in RFP)		
		Certificate of Non – Collusion
		Certificate of Tax Compliance
		Section 3 Business Concern
As Needed		Section 3 Resident Certification(s)

WESTMETRO HOME CONSORTIUM FUNDING APPLICATION			
Project NAME			
Project LOCATION	Full street address (with zip code), or other precise location.		
Project CONTACTS	Name & title of organization	Email	Phone
Owner			
Developer			
Community Contact			
Project SIZE	Site Acreage:	Total building gross square footage:	Total living (net) square footage:
Project FUNDING	HOME funds requested:	Total other funds to be used:	Total project cost:
Project SUMMARY & NEEDS	Provide a brief summary of the project, including: Location (amenities within walking distance, access to transit); short summary of details on page 2 (rehabilitation or new construction; target population; type of housing; special features); proposed measurable outcomes and brief citations (section & page) showing how the project meets a priority need(s) identified in the <i>FY16-20Consolidated Plan</i> .		

SOURCES OF FUNDS <i>Check all that apply.</i>							
<input type="checkbox"/> HOME funds	\$	<input type="checkbox"/> Other (identify sources)					
<input type="checkbox"/> CDBG funds	\$	\$					
<input type="checkbox"/> CPA funds	\$	\$					
<input type="checkbox"/> Private bank loan	\$	\$					
<input type="checkbox"/> Sales revenue	\$	\$					
USES OF HOME FUNDS <i>Check all that apply.</i>							
<input type="checkbox"/> Acquisition	<input type="checkbox"/> Rehabilitation	<input type="checkbox"/> New construction	<input type="checkbox"/> Redevelopment				
TARGET POPULATION & SPECIAL FEATURES <i>Check all that apply.</i>							
<input type="checkbox"/> Individual/Family	<input type="checkbox"/> Age Restricted	<input type="checkbox"/> Homeless/At Risk of Homelessness					
<input type="checkbox"/> Special needs/disabilities (identify population & provider of support services, if any):							
<input type="checkbox"/> Special features (historic preservation, sustainability, etc.):							
TYPE OF HOUSING <i>Check all that apply.</i>							
<input type="checkbox"/> Homeownership	<input type="checkbox"/> Rental	<input type="checkbox"/> Combination or other (identify):					
<input type="checkbox"/> Individual/Family							
<input type="checkbox"/> Single Room Occupancy / Group Residence							
<input type="checkbox"/> Condominium	<input type="checkbox"/> Permanent Supportive Housing						
UNIT COMPOSITION <i>List the development's number of units in each category.</i>							
	≤ 30% AMI	≤ 50% AMI	≤ 60% AMI	≤ 80% AMI	80% - 100% AMI	Market-rate	Total Units
SRO							
Studio							
1 BR							
2 BR							
3 BR							
4 BR/+							
HOME Units							
OUTREACH <i>Summarize efforts to date to communicate with abutters, neighborhood residents & local officials.</i>							

Development Team Information

- Resumes of key members of the development team.

General Contractor

Name:

Address:

Contact Person

Telephone: () -

Email:

Minority Business Enterprise: Yes No

Women’s Business Enterprise: Yes No

Section 3 Business Concern: Yes No

Architect

Name:

Address:

Contact Person

Telephone: () -

Email: _____

Minority Business Enterprise: Yes No

Women’s Business Enterprise: Yes No

Section 3 Business Concern: Yes No

Engineer

Name:

Address:

Contact Person

Telephone: () -

Email: _____

Minority Business Enterprise: Yes No

Women’s Business Enterprise: Yes No

Section 3 Business Concern: Yes No

Management Agent

Name:

Address:

Contact Person

Telephone: () -

Email: _____

Minority Business Enterprise: Yes No

Women’s Business Enterprise: Yes No

Section 3 Business Concern: Yes No

Attorney

Name:

Address:

Contact Person

Telephone: () -

Email: _____

Minority Business Enterprise: Yes No

Women’s Business Enterprise: Yes No

Section 3 Business Concern: Yes No

Development Consultant

Name:

Address:

Contact Person

Telephone: () -

Email: _____

Minority Business Enterprise: Yes No

Women’s Business Enterprise: Yes No

Section 3 Business Concern: Yes No

VI. Evaluation Criteria

Applications that have been pre-qualified and meet the Proposal Minimum Requirements will be evaluated on the following criteria:

1. *Experience of Applicant and the development team in projects of similar size and type*

Highly Advantageous: Development Team consists of owner, project manager, licensed and certified architects, engineer(s), contractor(s) and other professionals that have completed two or more financially viable HOME and/or federal or state subsidized housing projects of a scale and scope similar to current proposal.

Advantageous: Development Team consists of owner, project manager, licensed and certified architects, engineer(s), contractor(s) and other professionals that have completed at least one financially viable HOME and/or federal or state subsidized housing projects of a scale and scope similar to current proposal.

Not Advantageous: Development Team has preferred credentials in most, but not all areas of design and construction, and/or has little development experience in a project of a smaller scale than that described in the proposal.

Unacceptable: Development Team has no prior experience with like-type projects.

2. *Financial strength of Applicant to adequately carry out the project*

Highly Advantageous: The Applicant's current project workload, financial liquidity and existing financial obligations with respect to its current portfolio present no significant risks in successfully carrying out the proposed project.

Advantageous: The Applicant's current workload and existing financial obligations with respect to its current portfolio present acceptable risks in successfully carrying out the proposed project.

Not Advantageous: The Applicant's current workload and existing financial obligations with respect to its current portfolio present reducible risks in successfully carrying out the proposed project.

Unacceptable: The Applicant's current workload and existing financial obligations with respect to its current portfolio present unacceptable risks in successfully carrying out the proposed project.

3. *The project's financial feasibility*

Highly Advantageous: High likelihood that the Applicant has the resources to complete its project in the manner proposed. The proposal clearly demonstrates feasibility during construction and after completion. Costs are reasonable and justifiable and HOME funds represent the minimum amount of subsidy necessary to achieve maximum public benefit.

Advantageous: Reasonable likelihood that the Applicant has the resources to complete its project in the manner proposed. Proposal feasibility presents acceptable risks during construction and/or after completion. Costs are reasonable and justifiable and HOME funds represent the minimum amount of subsidy necessary to achieve maximum public benefit.

Not Advantageous: Not likely that the Applicant has the resources to complete its project in the manner proposed. Proposal feasibility presents reducible risks during construction and/or after completion. Some costs are not reasonable or justifiable, or the HOME funds represent a larger subsidy than is necessary.

Unacceptable: Applicant does not have the resources to complete its project in the manner proposed. Proposal feasibility presents unacceptable risks during construction and/or after completion. Costs are not reasonable or justified, or the HOME funds represent a larger subsidy than is necessary.

4. *The documented market need for the project*

Highly Advantageous: Evidence provided through primary or secondary data showing strong project demand with acceptable risk after accounting for key indicators and factors.

Advantageous: Evidence provided through primary or secondary data showing project demand with reducible risk after accounting for key indicators and factors.

Not Advantageous: Evidence provided through primary or secondary data showing unacceptable risk after accounting for key indicators and factors.

Unacceptable: No evidence of market need is provided.

5. *Readiness to proceed and ability to commit HOME funds within six (6) months of award and start construction within twelve (12) months of HOME commitment*

Highly Advantageous: Applicant has site control, zoning and other approvals are in place, all other funding sources are committed and project designs are completed.

Advantageous: Applicant has site control, strong support of zoning and other approvals will be in place, all other funding sources are committed, and project designs are near completion.

Not Advantageous: No strong support provided that zoning and other approvals will be in place; project plans are not sufficiently advanced to ensure timely commencement of project upon award.

Unacceptable: Applicant does not have site control; evidence of gaining approvals or funding commitments not in place; insufficient project plans.

6. *Project Score*

Highly Advantageous: Composite Project Score is 90 or above.

Advantageous: Composite Project Score is 80 - 89.

Not Advantageous: Composite Project Score is 70 - 79.

Unacceptable: Composite Project Score is 69 or below.

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VII. Project Scoring System

Scoring Criteria	Points
Project Location	
Project is located in a community where WestMetro HOME Consortium funding has been committed in the past:	
HOME funds never committed to project in community	20
5+ fiscal years	15
2 - 4 fiscal years	10
1 fiscal year	5
CHDO Project	
Project will be owned, developed, and/or sponsored by a WestMetro HOME Consortium certified CHDO	20
Creation of Affordable Units	
Project creates new affordability	10
Project extends affordability	5
Project does not create new affordable units or extend affordability	0
Bedroom Mix	
At least 10% of the total project units have 3 or more bedrooms	10
Target Population and Accessibility	
At least 15% of the total units targeted to serve chronically homeless individuals or families	5
At least 15% of the total units targeted to serve special needs groups or people with a disability	5
Project will create accessible units (sensory or mobility) beyond what is required by federal and state accessibility laws	5
Local Support	
The Project includes donated or leased land and/or financial support from the municipality (e.g. Community Preservation Act funds, waived fees or taxes)	10
Inclusion of W/MBE on the project development team	
The developer, general contractor, and/or management agent	5
The architect, engineer, consultant(s), and/or attorney	2
Term of Affordability	
Applicant agrees to permanent affordability	10
Total Possible Points	100

VIII. Reservation of Rights

The Consortium reserves the right to extend the deadline for submission of proposals, to request supplementary information, to conduct interviews with any or all of the applicants submitting proposals, to waive minor informalities, and to reject any or all proposals, in whole or in part, if in its sole judgment the best interests of the Consortium would be served in doing so. The Consortium will reject any and all proposals when required to do so by applicable law.

IX. Questions/Addenda

QUESTIONS: Inquiries involving procedural or technical matters shall be in writing to rpowers@newtonma.gov no later than 12:00 noon on October 11, 2019:

ADDENDA: Each applicant is required to acknowledge any/all Addenda. Applicants shall place their acknowledgment as the first line of their Transmittal/Cover Page. Addenda will be posted online at [http://www.newtonma.gov/gov/planning/hcd/westmetro_home_consortium .asp](http://www.newtonma.gov/gov/planning/hcd/westmetro_home_consortium.asp) and emailed to each Member Community.

X. Additional Forms

- Certificate of Non – Collusion
- Certificate of Tax Compliance
- Certificate of Section 3 Business Concern (*required for each development team member, even if not a Section 3 business*)
- Certificate of Section 3 Residents (*as applicable*)
- If 5 or more HOME-assisted units, HUD Affirmative Fair Housing Marketing Plan (*these PDF-fillable forms can be accessed by clicking the hyperlink below*):
 - [HUD Form HUD-935.2A for Multifamily](#)
 - [HUD Form HUD-935.2B for Single Family Housing](#)
 - [HUD Form HUD-935.2C for Condominiums](#)

CERTIFICATE OF NON-COLLUSION

Pursuant to the requirements of M.G.L. c.30B, §10, the undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word “person” shall mean any natural person, business, partnership, corporation, union, committee club, or other organization, entity, or group or individuals.

(Signature of individual)

Name of Business

CERTIFICATION OF TAX COMPLIANCE

Pursuant to M.G.L. c.62C, §49A and requirements of the City of Newton, the undersigned acting on behalf of the Contractor certifies under the penalties of perjury that the Contractor is in compliance with all laws of the Commonwealth relating to taxes including payment of all local taxes, fees, assessments, betterments and any other local or municipal charges (unless the Contractor has a pending abatement application or has entered into a payment agreement with the entity to which such charges were owed), reporting of employees and contractors, and withholding and remitting child support.*

**Signature of Individual
or Corporate Contractor (Mandatory)

*** Contractor's Social Security Number
(Voluntary) or Federal Identification Number

Print Name:_____

Print Name:_____

By: _____
Corporate Officer
(Mandatory, if applicable)

Date_____

* The provision in this Certification relating to child support applies only when the Contractor is an individual.

** Approval of a contract or other agreement will not be granted until the City receives a signed copy of this Certification.

*** Your social security number may be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed, or extended.

SECTION 3 BUSINESS CONCERN CERTIFICATION

It is the policy of the WestMetro HOME Consortium to utilize Section 3 residents and Section 3 businesses on projects that are partially or wholly funded with monies from the Department of Housing and Urban Development (HUD). Please complete the sections below for determination as a Section 3 Business Concern.

1. Business Information:

Company Name: _____

Street Address: _____

City, State, Zip: _____

Work Phone: _____

Email: _____

Business Website: _____

Describe the business's trade or services: _____

Contact Name: _____

2. Section 3 Status (*check one category*):

- A. Business claims status as a Section 3 resident-owned enterprise whereby 51% or more of the company is owned by Section 3 Residents.**

Choose one of the following options as evidence of status for each owner:

- Copy of public housing lease
- Copy of receipt of public assistance
- Copy of evidence of participation in a public assistance program
- Section 3 Resident Certification and Federal Tax Return

- B. Business claims Section 3 status by subcontracting 25 percent of the dollar award to qualified Section 3 Business Concerns:**

Attach both of the following documents as evidence of status:

- List of subcontracted Section 3 business concerns and subcontract amount
- Section 3 Business Concern Certification for eligible subcontractors

- C. Business claims Section 3 status as at least 30 percent of its permanent, full-time employees are currently Section 3 residents or were Section 3 eligible residents within 3 years of the date of first employment with the business:**

Attach the following applicable documents as evidence of status:

- List of all employees, include length of employment
- List all employees claiming Section 3 Resident status
- Section 3 Resident Certifications for employees claiming Section 3 Resident status

D. Business does not qualify as a Section 3 Business Concern.

3. Business Verification

For businesses that checked 2A, 2B or 2C, please provide documentation on the business structure and current standing.

Type of Business:

- Corporation/LLC – submit copy of Articles of Incorporation and Certificate of Good Standing
- Partnership/LLP – submit Partnership Agreement and Certificate of Good Standing
- Sole Proprietorship – submit Assumed Business Name Certificate/DBA
- Other- submit supporting documentation

4. Affidavit

I certify that the above statements are true, complete, and correct to the best of my knowledge and belief. I agree to provide, upon request, additional documents verifying the information submitted to qualify as a Section 3 Business Concern.

Owner Signature

Date Print Name and Title

Print Name and Title

SECTION 3 RESIDENT CERTIFICATION

For New Hires, Current Employees or for Residents Seeking Employment

Individuals residing in the City of Newton or within the Boston-Cambridge-Quincy Metropolitan Statistical Area who meet the income limits set forth below, can qualify for Section 3 Resident status (see map on page 2). Additionally, residents of public housing developments qualify as Section 3 residents.

I, _____, the undersigned certify, under penalty of law, as follows:

1. My permanent address is:
 Street Address: _____
 City, State, Zip: _____
 Phone: _____
 Email: _____

2. I do do not reside in public housing.
 If you do reside in public housing, list the name of the public housing community, city and state:

3. The total number of individuals in my family living in the household is: _____

4. Find your family size in the table below. Is your family income equal to or less than the income listed below that box?

YES, my family income is equal to or below the income limit for my family size.

NO, my family income is greater than the income limit for my family size.

FAMILY SIZE	1	2	3	4	5	6	7	8
PERSON	PERSON	PERSON	PERSON	PERSON	PERSON	PERSON	PERSON	PERSON
INCOME LIMIT	\$62,450	\$71,400	\$80,300	\$89,200	\$96,350	\$103,500	\$110,650	\$117,750

5. My employment status is *(check all that apply)*:

I am currently employed with the following employer: _____

My trade category is *(choose one)*:

Office/Clerical Professional Technician
 Construction *(list specific trade)* _____
 Other *(explain)* _____

My hire date: _____

Average number of hours worked per week: _____

I am in a training program. List employer: _____

Average number of hours of training per week: _____

I am seeking preference in training and employment opportunities.

6. I understand that the information above relating to my residency, the size and annual income of my family may require verification. Upon request, I agree to provide documents verifying this information. The City of Newton reserves the right to request and obtain additional information to verify Section 3 resident eligibility. I also authorize my employer to release this information for the United States Department of Housing and Urban Development, the City of Newton, and the prime and/or subcontractors to verify my status as a Section 3 Resident. I certify that the above statements are true, complete, and correct to the best of my knowledge and belief.

Signature

Print Name

Boston-Cambridge-Quincy MSA



City of Newton Use Only

- 1. Does the applicant reside in public housing? Yes No
- 2A. Does the applicant reside within the Boston-Cambridge-Quincy MSA? Yes No
If yes, list county: _____
- 2B. Does the applicant meet the income requirements? Yes No
- 3. Does the applicant qualify as a Section 3 resident? Yes No
(has the applicant replied yes to #1 or yes to both #2A and #2B?)

WESTMETRO HOME CONSORTIUM CONSTRUCTION STANDARDS

UPDATED MARCH 5, 2019

In accordance with the 2013 HOME Final Rule, 24 CFR 92.251, Uniform Property Condition Standards (UPCS) addressing Methods and Materials have been incorporated into the WestMetro HOME Consortium Rehabilitation Standards as required by the U.S. Department of Housing and Urban Development. These standards, in addition to all local codes, ordinances and zoning requirements, will apply to HOME Investment Partnerships Program-funded development and rehabilitation projects committed after January 24, 2015 and ensure upon completion that assisted projects will be decent, safe, sanitary and in good repair. All project sponsors seeking HOME assistance must conform to the standards outlined herein.

I. General Policy for Property Standard Inspections

1. **Inspection Procedures.** Each Member Community is responsible for using the appropriate HUD- issued inspection checklist as a tool to inspect the appropriate items and areas. Inspections may be carried out by certified or licensed professionals, including but not limited to in-house staff, qualified professional(s) from the development team or third-party consultants independent of the developer, owner or sponsor of the housing receiving HOME funds. Consideration should be given to the project size, complexity and developer capacity. Member Communities wishing to train and certify inspectors may do so using its HOME Administrative or other funding. Appropriate certifications must be kept on file or the inspection will be void.
2. **On-Site Inspections.** The Member Community is responsible for inspecting each HOME Project at the time of completion to ensure that the work is completed in accordance with applicable codes, standards, contract and construction documentation. The property must meet these criteria at close-out and during the HOME period of affordability. The Consortium Administrator provides notification of on-going inspections during the HOME monitoring period.
 - a. **Frequency of Inspections.** For *rental projects*, the first on-site ongoing inspections must occur within 12 months following project completion, and an inspection must be conducted at least once every three years thereafter. For *homeownership projects*, the unit(s) must be inspected and confirmed to meet property standards at the time of acquisition or be inspected within 12 months following project completion.

b. Sample Sizes.

- 100% of the HOME rental units must be inspected for projects consisting of 1 to 4 units.
- For projects with more than four HOME-assisted rental units, at least 20% of the HOME- assisted units in each building, but not fewer than four units in each project and one HOME-assisted unit in each building.

c. Follow up to Address Deficiencies. A follow up inspection is required within 12 months of the violation for non-health and safety deficiencies. For non-health and safety deficiencies, the Member Community may choose to conduct an on-site inspection or accept third party documentation (such as a paid invoice for work completed). Health and Safety violations must be corrected immediately. Member Communities may rely on the procedures specified in the “Opportunity to Cure” section in each project’s executed HOME Funding Agreement.

d. Annual Certification. During yearly rent approval, property owners must certify to the Member Community that the building(s) and all HOME-assisted units in the project are suitable for occupancy.

II. Property Standards for New Construction Projects

- 1. Minimum Standards.** All HOME-assisted projects must meet all Massachusetts State Building, local codes, ordinances, sanitary, and zoning requirements pursuant to 24 CFR 92.251. Additionally, consistent with UPCS guidance, projects must comply with the rehabilitation standards in Section III, Part 15 outline applicable methods and materials and construction requirements.
- 2. Accessibility.** Proposed projects must meet accessibility requirements as applicable in 24 Part 8, which implements Section 504 of the Rehabilitation Act of 1973 and Titles II and III of the Americans with Disabilities Act. (as implemented at 28 CFR Parts 35 and 36). Covered multifamily dwellings, as defined at 24 CFR 100.201, must also meet the design and construction requirements at 24 CFR 100.205, which implements the Fair Housing Act. Rehabilitation may include improvements that are not required by regulation or statute that permit use by a person with disabilities. In addition, sponsors must conform to any and all applicable Massachusetts laws and regulations regarding accessibility, including, in renovation projects, obtaining all necessary variances from the Massachusetts Architectural Access Board.
- 3. Disaster Mitigation.** The housing, where relevant, must include Disaster Mitigation Standards consistent with State and local requirements to mitigate the impact of potential standards (24 CFR 92.251(a)(2)).

4. **Project Oversight.** The Member Community must review and approve written cost estimates, construction contracts, and construction documents and conduct construction progress and final inspections to ensure that work is done in accordance with the applicable codes, contract, and construction documents. The Member Community is responsible for documenting these inspections. Inspections may be carried out by certified or licensed professionals, including but not limited to in-house staff, qualified professional from the development team or third-party consultants independent of the developer, owner or sponsor of the housing receiving HOME funds. Consideration should be given to the project size, complexity and developer capacity.
5. **Broadband Infrastructure.** New construction housing projects containing more than 4 rental units must include the installation broadband infrastructure, as defined in 24 CFR 5.100, except where the participating jurisdiction determines and, in accordance with §92.508(a)(3)(iv), documents the determination that:
 - (A) The location of the new construction makes installation of broadband infrastructure infeasible; or
 - (B) The cost of installing the infrastructure would result in a fundamental alteration in the nature of its program or activity or in an undue financial burden.

III. Property Standards for Rehabilitation Projects

1. **Minimum Standards.** All HOME-assisted projects must meet all Massachusetts State Building, local codes, ordinances, sanitary, and zoning requirements pursuant to 24 CFR 92.251. Additionally, consistent with UPCS guidance and as such, the following standards, methods and materials outline rehabilitation requirements.
2. **Health & Safety.** Each sponsor of an occupied project must provide a narrative describing the existing condition of the property, identifying any life-threatening deficiencies and a plan for addressing such deficiencies prior to commencement of renovation activities. The sponsor must describe how residents who will remain in structures under renovation will be assured of safe egress, protection from fire hazards, noxious fumes, exposure to hazardous materials, and loss of security for themselves and their possessions.

Certain health and safety issues must be addressed immediately when a unit is already occupied. These items include:

- Air Quality – Propane/Natural Gas/Methane Gas Detected
- Blocked Egress/Ladders
- Carbon Monoxide/ Smoke Detector – Missing/Inoperative
- Electrical Hazards – Exposed Wires/Open Panels
- Electrical Hazards – Water Leaks on/near Electrical Equipment
- Emergency Fire Exits – Emergency/Fire Exits Blocked/Unusable

- Leaking smoke pipes on all gas or oil fired appliances and/or heating units
- Missing Outlet Covers
- Missing/Damaged/Expired Extinguishers
- Misaligned/Leaking Chimney and/or Ventilation Systems
- Open Waste Lines
- Outlets/Switches/Cover Plates – Missing/Broken
- Windows – Security Bars Prevent Egress

3. Major Systems. Major Systems are the following:

- Structural support
- Roofing/siding/cladding/weather proofing
- Windows/doors
- Plumbing/electrical
- Heating/ventilation/air conditioning
- Chimneys
- Decks and Stair systems

4. Useful Life of Major Systems. In housing with 26 or more units, an estimate of all Major Systems, as outlined above and defined by HUD, appliances and other components of the proposed project, including fire suppression and/or detection, security, tel/data, stormwater management systems, basic livability requirements mandated by the Massachusetts State Sanitary Code, and requirements of the Massachusetts Architectural Access Board and applicable Federal accessibility standards, must be completed by a capital needs assessment conducted by a third-party hired by the owner, developer or the Member Community. Additionally, each project sponsor must complete a systems checklist identifying each major system, its current condition, the proposed scope of rehabilitation, and the expected useful life of the system following rehabilitation.

If the housing contains less than 26 units, an- in-house capital needs assessment is acceptable, so long as it is conducted by a qualified individual. If the person is unable to acquire an original install date of the system, he/she should estimate the useful life using their experience in the field.

- a. **For rental housing,** if the useful life of any Major System is less determined to be less than the HOME Affordability Period the owner/developer must establish a replacement reserve. The owner/developer must make adequate monthly payments to said reserve that will allow repairs and replacement as needed.
- b. **For ownership housing,** all Major Systems must have a useful life of at least five years. If a Major System does not meet this standard, they must be rehabilitated or

replaced as part of the rehabilitation work.

5. **Energy Conservation and Green Design:** Project sponsors will be required to provide information on energy efficiency and green design in their applications, in particular, aspects of developments that exceed requirements of the base Massachusetts Building Code, or the “Stretch Code” if adopted by the locality.
6. **Lead Paint.** Project sponsors are required to follow Lead-Based Paint provisions of 24 CFR Part 35. For properties occupied by children less than 6 years of age, full abatement is required. Sponsors also must conform to all Massachusetts laws and regulations, as well as EPA requirements regarding lead-based paint, including protection of workers who may be exposed to lead paint during the construction process.
7. **Accessibility.** Proposed projects must meet accessibility requirements as applicable in 24 Part 8, which implements Section 504 of the Rehabilitation Act of 1973 and Titles II and III of the Americans with Disabilities Act. (as implemented at 28 CFR Parts 35 and 36). Covered multifamily dwellings, as defined at 24 CFR 100.201, must also meet the design and construction requirements at 24 CFR 100.205, which implements the Fair Housing Act. Rehabilitation may include improvements that are not required by regulation or statute that permit use by a person with disabilities. In addition, sponsors must conform to any and all applicable Massachusetts laws and regulations regarding accessibility, including, in renovation projects, obtaining all necessary variances from the Massachusetts Architectural Access Board.
8. **Disaster Mitigation.** The housing, where relevant, must include Disaster Mitigation Standards consistent with State and local requirements to mitigate the impact of potential standards.
9. **Inspection Forms.** Upon initial completion and ongoing property inspections, each inspector shall use Form HUD-52580 (the standard “Inspection Checklist” Housing Quality Inspection form), or a successor form as directed by HUD.
10. **Work Write-Ups and Cost Reasonableness.** The Member Community must review and approve work write-ups (i.e. plans and specifications) to ensure that the work will be in compliance with the standards outlined herein. The Member Community must review a written cost estimate and approve the estimate after determining that the costs are reasonable.
11. **Frequency of Inspections.** The Member Community must conduct an initial inspection in order to determine deficiencies that must be addressed; periodic inspections to monitor construction progress; and a final inspection to ensure all work was done in accordance with

the work write-ups and/or plans. The Member Community is responsible for documenting these inspections. Inspections may be carried out by certified or licensed professionals, including but not limited to in-house staff, qualified professional from the development team or third-party consultants independent of the developer, owner or sponsor of the housing receiving HOME funds. Consideration should be given to the project size, complexity and developer capacity.

12. Ongoing property condition standards. For the duration of the HOME affordability period, all rental housing must meet:

- a. Massachusetts State Building Sanitary, and Zoning Codes
- b. The Housing Quality Standards pursuant to 24 CFR 982.
- c. Health and Safety defects, as identified in Section 2 of this policy
- d. Lead-based Paint requirements, as identified in Section 5 of this policy
- e. Local Zoning Ordinances
- f. National Electrical Code
- g. Massachusetts Fuel Gas and Plumbing Code
- h. Massachusetts Fire Regulations
- i. Massachusetts Elevator Regulations
- j. Massachusetts Department of Public Health Requirements
- k. Massachusetts Historic Commission Regulations
- l. U.S. Department of Energy Regulations
- m. Massachusetts Department of Environmental Protection Regulations
- n. HUD Rehabilitation Guidelines
- o. Americans with Disabilities Act
- p. Massachusetts Architectural Access Board Regulations
- q. Local, State and Federal Requirements Related to Sewage/Septic Systems
- r. Requirements for HOME Environmental Provisions

13. Corrective Actions. A follow up inspection is required within 12 months of the violation for non- health and safety deficiencies. For non-health and safety deficiencies, the Member Community may choose to conduct an on-site inspection or accept third party documentation (such as a paid invoice for work completed). Health and Safety violations must be corrected immediately. Member Communities may rely on the procedures specified in the “Opportunity to Cure” section in each project’s executed HOME Funding Agreement.

14. Uniform Physical Condition Standards (UPCS): All sponsors will be required to ensure that assisted housing will be decent, safe, sanitary, and in good repair as described in 24 CFR 5.703 (<https://www.gpo.gov/fdsys/pkg/CFR-2011-title24-vol1/pdf/CFR-2011-title24-vol1-sec5-703.pdf>). Monitored projects will include the UPCS inspectable items and observable deficiencies for the site, building exterior, building systems, common areas, and units

identified on the following. Sponsors should review the following appendices: HOME Investment Partnerships Program FAQ (<https://www.hudexchange.info/onecpd/assets/File/HOME-FAQs.pdf>), as well as CPD Notice 18-08, Section IV, D, 2, (g) (<https://www.hudexchange.info/resources/documents/Notice-CPD-18-08-Guidance-on-Submitting-HTF-Allocation.pdf>).

15. Methods, Materials and Additional Standards for Multifamily Rehabilitation Projects:
Sponsors of multifamily rental projects are to follow the following standards as closely as possible.

Overall Unit Size:

- SRO: 120 square feet (sf)
- Enhanced SRO: 175 sf (includes food preparation area and bathroom)
- One-bedroom unit: 600 sf (or applicable HUD program standards; for example section 202)
- Two-bedroom unit: 850 sf
- Three-bedroom unit: 950 sf
- Four- or more bedroom unit: 1,100 sf

Minimum Room Size:

Rooms in rehabilitation projects shall meet the following minimums (including a dimensional minimum):

- Primary bedrooms: 120 sf (10.5 ft.)
- Secondary bedrooms: 100 sf (9.5 ft.)
- Living room: 150 sf (12 ft.)
- Dining room: 100 sf (10 ft.)
- Living/dining room combo: 200 sf (12 ft.)
- Full bathroom: 40 sf (5 ft.)

If a room has a sloped ceiling, any portion of the room measuring less than 5 feet from the finished floor to the finished ceiling shall not be included in the measurements of the floor area.

Closets and storage cannot be included in the measurement of the floor area.

Kitchen:

The size of the unit should determine the amount of counter space to be provided:

	<i>counter space length</i>	<i>minimum circulation width</i>
• One-bedroom unit	6 linear feet	4 feet
• Two-bedroom unit	8 linear feet	4 feet
• Three or more-bedroom unit	10 linear feet	4 feet

The minimum total linear feet of counter cannot include the space occupied by the sink, stove, and refrigerator.

3. The proposal must include all phases of construction that will produce a functional and attractive finished product. In other words, all aspects of construction leading to a finished product must be included in the proposals whether expressly stated in the bid specifications or assumed to be included as an expected part of the work. For example, if a door is called for in the work specifications, then it must include the jambs, header, sill, hinges, doorknob, bolt, striker, trim, painting, etc.
4. When any item, such as a light fixture, plumbing fixture, stove, etc., has to be temporarily removed and later re-installed, the cost of this work must be included in the bid. For example, if new flooring is called for in the bathroom, the installer must include the cost of removal and re-installation of the toilet in the proposal.
5. All materials must be installed according to the manufacturer's recommendations.
6. No "seconds" or inferior materials will be permitted.
7. Any materials damaged while being removed or installed will be replaced by the contractor at his own expense, if in the opinion of the project oversight inspector, care or good judgment was not exercised.
8. If any work is unsatisfactory to the project oversight inspector, it must be done again and/or modified until satisfactory at the contractor's expense, or another contractor will complete the work and the original contracted line item price will not be paid.
9. If a subcontractor, hired by the General Contractor, accidentally harms another contractor's work, the General Contractor will be responsible for required repairs, and the project oversight inspector will be notified immediately.
10. All trades must adhere to state, federal, and local codes.
11. All necessary permits must be applied for and inspections arranged by the subcontractors and contractors.
12. All work must be accomplished in a workmanlike and diligent manner. The contract will specify a reasonable time for completion of a project. A project should be completed within the specified time limits in the contract with as few delays as possible. The finished product should be pleasing to the eye.
13. The general contractor is responsible for coordination of the work of all subcontractors such as plumbing, wiring, and carpentry. Where and when it is required, the General Contractor will coordinate with Lead and Asbestos Abatement contractors. All trades must comply with state, federal, and local regulations governing other trades. For example, during asbestos and lead removal, no other work can proceed on the project.
14. The homeowner will choose all colors and patterns.
15. Homeowners must be contacted at least one day prior to the start of the work.
16. No homeowner will be left without the use of facilities (bathroom, heat, kitchen, etc.) overnight, unless homeowner has agreed.
17. Rubbish from construction must be removed on a regular and frequent basis and should be confined to one location which is approved by the homeowner. It is particularly important not to leave rubbish or any staging at the project during any brief hiatus in the work, such as a delay in the delivery of materials.

18. All suggested name brands are consistent with the quality and Energy Star standards, and any substitutions of products must be of equal quality and standards to maintain consistency with existing materials or fixtures. In addition, any substitutions must be specified in the bidding process and approved by the project oversight inspector to maintain the consistency of quality.

CARPENTRY

1. All structural wood must be construction grade or better.
2. All permanent supports of buildings and structures (including porches) shall extend a minimum of four feet below grade except when erected upon sound bedrock.
3. The diameter and footings of all concrete piers must comply with state, federal, and local codes.
4. All wood in contact with ground or masonry and supporting permanent structures shall be approved treated Wolmanized pressure treated wood.
5. All wood less than two inches above the surrounding grade, in locations subjected to pounding of water, and/or in a location subjected to dampness, shall be approved wood type (redwood, etc.) or pressure treated.
6. All kitchen and bathroom cabinets must have four sides and a bottom shelf. Fronts shall be pre-finished plywood, hardwood, or plywood with a washable veneer.
7. All locksets must be equal to or better than Schlage unless stated otherwise in the specifications.
8. All tub surrounds must be equal to or better than Sterling. All tub surrounds will be constructed of fiberglass and Gelcoat or Formica.
9. All suspended ceilings must be at least equal to Owens-Corning, pebble white, and meet fire rated requirements for specific applications.
10. All countertops must be equal to or better than Formica and be post-formed with backsplash and include factory miters and/or fixture openings.
11. All exterior doors must be equal to or better than "THERMA-TRU" Smooth-Star Fiberglass Door Model #S2100, with clear insulated glass and Low E film, include custom cut-down charge if applicable, and shall meet or exceed state and Energy Star requirements for energy conservation.
12. All areas that will have sheetrock must be left level, square, studded, furred, backed, and plumbed for sheetrock.
13. Fire code (5/8") sheetrock to be used to surround each apartment in a multi-family dwelling to provide a one (1) hour fire rating.
14. All interior doors leading to common areas in a dwelling containing more than one unit shall meet state, federal and local fire ratings.

ROOFING

1. All roofing materials must be of quality equal to or better than preformed white aluminum drip edge, 15 lb. felt, 30-year architectural algae resistant shingles, aluminum back flashing, and lead cap flashing.
2. Valleys can be woven or flashed with aluminum in six (6) foot lengths.
3. All chimneys, roof flanges, etc. must be flashed, counter-flashed, and made weather-tight.
4. All low-slope roofs to have double coverage, GAF or equal with blind nailing, rubber membrane covering, peel and apply products such as "low-Slope", bituthane under covering, or shingles installed as indicated by state building code.
5. Fill in all spaces in roof sheathing.
6. Replace all deteriorated roof sheathing (if visually available from attic area) and make allowances in bid price.
7. All roof insulation shall include proper ventilation as indicated by state building codes.

STORM DOORS AND WINDOWS

1. All aluminum combination storm doors must include all screens, storm sash, have a baked enamel or mill finish (owner's choice), be fitted with a self-closing device, and be equal to or better than one (1) inch door by Viking.
2. All aluminum combination storm windows must include screens and storm sash and be equal to Viking Rex or an approved equal.
3. All screens are to be aluminum.
4. The homeowner will choose either baked enamel or mill finish.
5. Fixed windows will not require a screen.
6. Unusual windows are to be custom cut and fit.
7. Unless specified otherwise, all new window installations will have a U factor and SHGC of .27 or lower, such as Harvey Classic, Norandex Viewpoint 5000 Series, MI 1555 Series (or approved equal) with matching grids and aluminum half screens. Use obscure glass in bathrooms. Cellar windows will be either sliding, hopper, or awning according to specs. Tempered glass to be used whenever MA code dictates. When a new rough opening is required, window size shall meet minimum requirements as indicated by state building code.

INSULATION

1. All attic insulation must strive for an R-factor of at least 30, where possible.
2. In floored attics being blown in, remove enough boards to fill the bays and replace boards, drill and plug with permission of owner.
3. Materials can be class #1 cellulose, loose or blanket fiberglass.
4. Allow for ventilation above insulated rafters.
5. Sidewalls to be filled to capacity when called for. At least two holes per bay (8 feet tall).
6. Ventilation to be provided at a rate of one square foot of clear vent for every 300 square feet of insulation and vapor retarded areas.

7. Walls that are opened and insulated with blanket/batt fiberglass installation to include poly vapor barrier lapped four inches.

SHEETROCK

1. Use 5'8" sheetrock where one (1) hour fire rating is required.
2. Use 5/8" sheetrock where studs or joists are more than 16" OC.
3. Ceilings are to be screwed. Walls can be nailed. When sheetrock is applied over existing plaster it is to be screwed to joists or studs.
4. Moisture resistant sheetrock to be used in areas of high humidity such as bathrooms, laundry, and behind kitchen sink base.
5. Allow for any backing, blocking, shimming, furring, or studding necessary to do a square, level, and smooth job. This must be included in the bid price.
6. Sheetrock joints to be covered with tape (imbedded in compound), joints and nails/screws to be covered with three (3) coats of compound, final coat to be finished smooth and ready for paint, etc.

FLOORING

1. All flooring will have a material cost listed in the specs (not including installation). Contractor will include any additional installation (labor and substrates) costs and material cost per square foot on bid form.
2. All sheet goods flooring must be applied to a smooth, dry surface.
3. Existing resilient flooring will have a plywood underlayment for new resilient flooring or cement board for tile applied over existing flooring, prior to installation of new, and include labor and material on bid form.
4. Before installing plywood or cement board on the floor in the bath, the toilet must be removed.
5. All voids and cracks must be filled with a leveling agent.
6. If a stove, toilet, plumbing fixture, electrical fixture, vanity, or anything else has to be removed and replaced, the cost of removal and replacement must be included in the bid price.
7. If the flooring is not scribed to the satisfaction of the project oversight inspector, a base shoe, carpet strip, or cove base must be installed and finished at the contractor's expense.
8. All preparation and finish of surfaces must be included in the bid.

PAINTING

1. Before painting, all areas must be clean, all holes must be patched, all caulking complete, all sashes must be glazed where necessary, all peeling paint scraped and feathered, all loose wood nailed. This must be included in the bid. All severely damaged wood, siding, trim, etc. to be replaced must be included in the bid price.
2. All exterior paint must be equal to or better than Sherwin-Williams or Benjamin Moore.

3. All interior paint must be equal to or better than Sherwin-Williams or Benjamin Moore.
4. All sheetrock walls and ceilings to receive one coat of primer and two topcoats of finish.
5. All interior stain must be equal to or better than Minwax.
6. All exterior stain must be equal to or better than Cabot or Cuprinol.
7. All urethane must be applied in three coats. The first two coats are to be lightly sanded and materials are to be equal to or better than Minwax or Zip-Guard.
8. All interior and exterior watermarks, stains, or knots to be treated with at least one coat of pigmented shellac, Kilz, Bin, or Equal.
9. Check the entire contract to bid on all new work done by carpenters, sheet rockers, and other trades. Unless specified otherwise, contractor will be responsible for painting all new work.

MASONRY

1. All masonry to be in accordance with the State Building Code as well as local ordinances.
2. Before repointing, all joints are to be raked to a minimum depth of ½" and wetted. Tooling and color of new mortar to match existing as closely as possible from local sources.
3. Step flashing to be lead, counter-flashing may be aluminum.
4. All new chimneys to be clay-flue lined with approved clean-outs and thimbles. All chimneys will be waterproofed prior to installation unless masonry units fulfill this requirement.

PLUMBING

1. All kitchen sinks must be of a quality equal to or better than Dayton's stainless, double bowl sink.
2. All kitchen faucets must be of quality equal to or better than Delta, spray to be included.
3. All tubs to be American Standard's Builder (cast iron) or equal.
4. All tub and shower valves to be Symmons S96-2 (anti-scald) or equal. Waste and overflow to be Gerber 41-812 or equal.
5. Water closet to be Gerber or equal (water-saver).
6. One-piece lavatory to be Universal Rundle's one-piece china top or pre-formed top by Roma, Northwest Marble, or equal.
7. Unless specified otherwise, all vanity bases to be 20", 24", or 30", Universal Rundle or Old Hampshire's pre-finished vanity base.
8. Unless specified otherwise, vanity tops to be one-piece china, pre-formed or post-formed Formica top with a drop-in lavatory that is cast in china and must be American Standard or equal.
9. All vanity faucets to be Delta or equal.
10. All necessary carpentry or other trade work must be included in the bid, unless other arrangements have been made, especially in regard to vent pipes. Ask the homeowner for the least objectionable location for the vent pipe.

11. All accessible lead, steel, or brass pipe connected to a fixture that is being replaced is to be removed.
12. Install shut-offs and escutcheons for all new fixtures except tubs.
13. All work to be in accordance with the Massachusetts building code.

HEATING

1. All new heating units to be Energy Star Qualified, unless otherwise specified. Heating device will include a programmable thermostat that offers four convenient pre-programmed settings and be Energy Star qualified.
2. All work to be in accordance with Massachusetts building code.
3. All related code material, such as 5/8" fire-rated sheetrock, buried oil line, thermostat, filters, and firematics to be included in the bid. All extraordinary situations that might endanger the safety of the resident or go against code to be made safe.
4. Removal of old heating unit to be included in bid.
5. All water heaters must be Energy Star qualified, unless specified otherwise.

ELECTRICAL

1. All cellar light fixtures and the light fixture over the cellar stairs to be porcelain or Bakelite and include illumination bulb such as the type recommended by Energy Star.
2. All bathroom and kitchen counter top plugs must be ground-fault protected.
3. Overhead light fixtures will have a spec'd allowance per fixture unless the owner supplies fixtures.
4. All splices to be in box.
5. All bath vents to be Panasonic Whisper or equal and must be vented to the exterior.
6. All related carpentry work or other trade work must be included in the bid unless other arrangements have been made.
7. Wire mold is objectionable to many homeowners. It should be used only with the prior written permission of the homeowner. Otherwise, it will not be permitted.
8. If the bid specifications call for a switched overhead fixture, the outlet, the switch, and related wiring must be included in the bid.
9. All work must be in accordance with the Massachusetts building code.
10. All light fixtures to provide illumination will be Energy Star qualified.

16. Required Architectural Submission (Multifamily Rental Rehabilitation Projects):

This section outlines the type of drawings and other documentation that sponsors must submit for rehabilitation projects that fall within these guidelines. An architect and/or construction cost estimator must prepare the plans and construction budgets applicable for each project.

Site Plan:

Indicate the location of the building, property lines, access to the building from the street, landscape, curb cuts, driveways, orientation (north arrow), at an appropriate scale.

Existing Floor Plan:

Include plans for each floor, including basement and roof. Drawings should be drawn at an appropriate scale. The existing floor plans should include the following information:

- Structural elements such as existing bearing walls, columns (indicate this with a note or graphically, e.g.: shade in the structural walls).
- Direction of floor joists if structural changes are being made.
- Existing plumbing, ventilation chase, fireplaces and any other information that affects design.

Proposed Floor Plans:

Drawings should address changes of layout, removal of walls or structural elements, or any other changes. The proposed floor plans should include the following information:

- Unit Floor Area (i.e., the total area within the unit exterior walls).
- Room Areas (i.e., the area within the perimeter wall of the room excluding storage and closet space).
- Critical overall and interior dimensions.
- Vertical structural elements.
- Wall thickness to scale.
- Location and size of windows, indicating the window-sill height (measured from the finished floor).
- Ceiling heights.
- Location of mechanical equipment, meters, and electric service panels.
- Location of water, gas, sewer, and electric services.
- In the case of attic renovation, drawings should be provided indicating ceiling heights, knee wall heights, dormers location, etc.
- All units should be built with internet connectivity, COAX cable for TV and CAT5e or better for tel/data.

Elevations:

Drawings should include all elevations impacted by the scope of work.

Landscaping Guidelines:

This section outlines suggestions for site improvements and landscaping for projects that all under these guidelines.

Site Design:

- Where possible and feasible, provide usable areas such as the following where the community can meet and gather:

- o Safe play areas for children in multifamily developments.
 - o Community garden areas, including planters for vegetables, herbs, flowers.
 - o Semi-public open spaces.
 - o Patios, front yards, porches, or balconies to encourage community interaction and provide eyes on-the-street surveillance.
 - Provide for alternative transportation, e.g., bike paths and storage, pedestrian links, car shares.
 - Provide all required accessible routes of travel, and in general, avoid use of stairs, wherever the terrain permits.
- Prioritize pedestrian over vehicular traffic and use traffic calming devices. Incorporate attractive well-lit pedestrian paths wherever possible.

Site Demolition and Clearing:

- Remediate all hazardous materials such as asbestos (ACMs), lead (LCMs), PCB's, VOC's, Arsenic, etc. carried out in accordance with all applicable local, state and federal regulations.
- Provide a summary and accurate estimate of the site remediation plan, if applicable, along with grading plans.

Tree/Shrub Pruning and Removal:

- Remove trees that originate at foundation wall of building or present a hazard to the structure.
- Remove dead trees.
- Trim stump to below grade.
- Prune back branches that overhang roof or brush walls of building.
- Prune branches that may threaten utility connections.
- Clean up and properly dispose of brush and wood.
- Remove shrubs that are diseased, those that obstruct walkways, drives and pathways, and those that obstruct windows.

Grading:

Restore grade to include, when appropriate, a 6" minimum deep planting bed of clean loam/topsoil. New grade should slope away from buildings and fit the existing neighboring grades, particularly at street or sidewalk. Grades for usable lawn areas should not exceed twenty percent. The grade across paved areas should not exceed four percent, or any applicable maximum slope required by accessibility or applicable site engineering standards.

Paving, Fencing and Walls:

- Restore walks and driveways to good condition.

- Fences should generally never exceed a height of 6 feet. Material and style should be appropriate to surrounding neighborhood.

Lawns:

- Sod or seed new lawns. If seeded, pegged cloth or salt hay should be used to prevent erosion on slopes in excess of six percent. If lawn area is shady, seed or sod should include appropriate mix of fescues or other low maintenance grasses, which will tolerate shade.
- Require general contractor to maintain all lawns throughout applicable warranty periods.

Plantings:

Select hardy, maintainable, regional stock. All plantings should be placed in a manner that enhances the appearance of the property and is in keeping with the surrounding neighborhood.

IV. Property Standards for Housing Acquisition

- 1. Recently Built or Rehabbed Housing.** The Member Community must ensure that newly constructed or rehabilitated housing done so within one year of the expected HOME Commitment meets the applicable property standards at 24 CFR 92.251(b) (either the new construction or rehabilitation standards). If the property does not meet the appropriate standards, it cannot be acquired with HOME funds unless it is brought up to the appropriate standards. Compliance must be documented based on a review of approved building plans and certificates of occupancy and a property inspection that is conducted no earlier than 90 days before committing HOME funds.
- 2. Other Existing Housing – Rental.** Housing not recently rehabilitated or newly constructed that will be acquired for rental housing must meet the Consortium’s Rehabilitation Standards. The Member Community must inspect the housing 90 days before committing HOME funds. If the housing does not meet the Consortium’s Rehabilitation Standards, it must be rehabilitated to meet the applicable property standards at 24 CFR 92.251(b).
- 3. Other Existing Housing – Homeownership (Downpayment).** Housing must meet the Massachusetts State Building, local codes and Housing Quality Standards, ordinances, sanitary, and zoning requirements; additionally, the housing must be free of any deficiencies identified by HUD in the UPCS (24 CFR 5.705).

V. Property Standards for Tenant-Based Rental Assistance

- 1.** Units occupied by households receiving HOME TBRA must meet the Housing Quality Standards at 24 CFR 982.401.