
HOUSING FINANCE AUTHORITY OF HILLSBOROUGH COUNTY

Local Government Area of Opportunity Funding

Application

**THIS APPLICATION IS SOLELY FOR THE USE OF APPLICANTS SEEKING A LOCAL GOVERNMENT
LOAN IN AN AMOUNT SUFFICIENT TO MEET THE LOCAL GOVERNMENT AREA OF
OPPORTUNITY FUNDING REQUIREMENTS IN CONJUNCTION WITH FHFC RFA 2024-202**

DUE DATE: JUNE 3, 2024

SUBMIT:

An original and one (1) hard copy of the entire application to:

Housing Finance Authority of Hillsborough County
c/o County Attorney
Mary Helen Farris
601 East Kennedy Boulevard, 27th Floor
Tampa, Florida 33602

**One (1) hard copy and a PDF of the entire application, a \$5,000 application fee (check made out to the
HFA of Hillsborough County), and \$2,500 review fee (check made out to The Hendrickson Company)**

to:

Mark Hendrickson
1404 Alban Avenue
Tallahassee, Florida 32301

Contact: Mark Hendrickson, 850.671.5601 mark@thehendricksoncompany.com

REVISED April 19, 2024

GENERAL INFORMATION

NOTE: If any of the Project Threshold Criteria are not met, then the application will not be considered by the HFA. If an application is approved, then the HFA will determine the loan terms for the local government support, including any other terms required by the HFA (including, but not limited to, the applicant paying the HFA's legal fees and all costs related to the local government support loan).

Please indicate if Applicant will use these funds in conjunction with (check one)

FHFC HOUSING CREDIT RFA 2024-202

HFA OF HILLSBOROUGH COUNTY LOAN REQUEST: Please provide the details of your request for a local government contribution, including the requested loan amount and loan terms, including interest rate, maturity date, amortization, and balloon (if any). The maximum amount of the HFA loan is the minimum amount that will allow the Applicant to meet threshold under the FHFC's guidelines. This exact amount will be noticed in the Notice of Fund Availability.

LOAN AMOUNT REQUESTED: _____

MATURITY OF LOAN IN YEARS: _____

INTEREST RATE: _____

AMORTIZATION: _____

BALLOON, IF ANY: _____

Please provide evidence of any local government contribution funds that are committed to this proposed development other than the requested funds from the HFA. Attach as Exhibit 1.

I. DEVELOPMENT SUMMARY AND TIMELINE

A. Provide a short narrative description of the Development. All resident programs, amenities, unit features, energy efficiency features, must be detailed. See **Exhibit 2**, which must be completed and submitted as part of the application. MAJOR DEVELOPMENT AMENITIES WILL BE INCLUDED IN THE LAND USE RESTRICTION AGREEMENT. Also attach as **Exhibit 3** (i) a timeline for the completion of the development which includes all key dates, including anticipated timing of permits and credit underwriting, Housing Credit closing date, completion of construction, rent up, and stabilization, and (ii) a map of the proposed development location.

B. FHFC Category for Required Funding Level

- Garden-Wood
- Garden-Concrete
- Mid-Rise- Wood
- Mid-Rise- Concrete
- High-Rise New Construction
- Garden Rehab
- Non-Garden Rehab

C. SUMMARY OF PROPOSED DEVELOPMENT

Name of Development	
Location of Development, by street address, or if no address, by mileage from nearest cross streets	
Developer/Location of Developer (name of controlling company, not of LP or LLC).	
Contact person for application, including name, email, and phone numbers	
New Construction or Rehabilitation	
Development Construction Type Garden, Mid-Rise, High-Rise, Other (explain)	
Family, Elderly, or other	
Concrete or Wood	
Number of Buildings	
Number of Stories Per Building	
Number of Units	
Number of Units by Bedrooms	
Total Development Cost	
TDC per unit	
Land Cost	
Acquisition of Building Cost if applicable	
Hard Rehab Cost or Construction Cost	
General Contractor	
Set Aside Period (Minimum of Perpetuity)	
Set Aside Levels Number of Bedrooms by AMI level, as will be used for Housing Credit Basis	
Current Zoning	
Evidence of Site Control	
Geographic Area of Opportunity (Yes or No)	
Small Area Difficult Development Area (Yes or No)	
Public Transportation Utilized for FHFC Proximity Scoring, Location, Type of Transportation, and Distance	

II. APPLICANT INFORMATION

A. Applicant Name: _____

Must be a legally formed entity (i.e., limited partnership, corporation, etc.) qualified to do business in the State of Florida at the time of submission of Application.

B. If partnership, name of general partner(s): _____

If corporation, name and title of executive officer: _____

Address: _____

Telephone: _____ Facsimile: _____

III. PROPOSED PROJECT FINANCING

A. Proposed Finance Summary: Please provide a permanent loan period detailed sources and uses that is in a format acceptable to FHFC for RFA 2024-202. Attach as **Exhibit 4**.

B. Operating Pro Forma: Provide a 15-year operating pro forma and attach as **Exhibit 5**.

IV. ABILITY TO PROCEED

Each Application shall be reviewed for feasibility and ability of the Applicant to proceed with construction of the Development.

A. Site Control (PROJECT THRESHOLD CRITERIA)

Site Control must be demonstrated by the APPLICANT:

___ Eligible Contract

___ Deed or Certificate of Title

___ Lease

Provide evidence of Site Control and attach as **Exhibit 6**.

Note: Use of the FHFC site control form will **NOT** meet this requirement.

B. Zoning and Land Development Regulations (PROJECT THRESHOLD CRITERIA)

1. a. Is the site appropriately zoned for the proposed Development: No ___ Yes ___
- b. Indicate zoning designation (s) _____
- c. Current zoning permits ___ units per acre, or ___ for the site (PUD).
- d. Total Number of Units in Development:

Note: Use of the FHFC form for zoning from RFA 2024-202 will meet this requirement. Provide evidence that the proposed use is permitted and attach as **Exhibit 7**.

V. FOR ALL APPLICANTS:

Provide a narrative describing how the proposed development meets the **ALL OF THE PROJECT THRESHOLD AND SELECTION CRITERIA** detailed within the NOFA and attach as **Exhibit 8**. Address all Project Selection Criteria listed in the NOFA.

VI. SELF-SCORING OF FHFC HOUSING CREDIT APPLICATION INCLUDING PROXIMITY TO PUBLIC TRANSPORTATION

Provide the score expected to be received on the application for Housing Credits, including point score and all tiebreakers, assuming the Applicant meets threshold for Local Government Contribution. Attach your response as **Exhibit 9**. BE SURE TO ADDRESS YOUR ANTICIPATED SCORE RELATED TO MEETING THE THRESHOLD CRITERIA IN THE FHFC RFA RELATED TO PROXIMITY FOR ALL SERVICES, AND PROVIDE A WRITTEN NARRATIVE THAT EXPLAINS THE ANTICIPATED SCORE IN DETAIL. PLEASE PROVIDE THE LOCATION OF THE PUBLIC TRANSPORTATION/BUS STOP, AND THE TYPE OF STOP IT IS, AND THE DISTANCE THAT YOU CALCULATE FROM THE DEVELOPMENT TO THE PUBLIC TRANSPORTATION. DETAILS ON ALL TIEBREAKERS MUST BE PROVIDED.

VI. CERTIFICATION (Original Signatures Required)

The undersigned Applicant certifies that the information in this Application is true, correct and authentic.

THE APPLICANT FURTHER ACKNOWLEDGES HAVING READ ALL APPLICABLE AUTHORITY RULES GOVERNING THE PROGRAM AND ACKNOWLEDGE HAVING READ THE NOFA AND THIS APPLICATION.

THE APPLICANT UNDERSTANDS AND AGREES TO ABIDE BY THE PROVISIONS OF THE APPLICABLE FLORIDA STATUTES AND AUTHORITY PROGRAM POLICIES, RULES AND GUIDELINES, INCLUDING THOSE DETAILED IN THE NOFA AND THIS APPLICATION.

THE UNDERSIGNED REPRESENTS AND WARRANTS THAT THE INFORMATION PROVIDED HEREIN IS TRUE AND ACCURATE. THE PERSON EXECUTING THIS DOCUMENT REPRESENTS THAT HE OR SHE HAS THE AUTHORITY TO BIND THE APPLICANT AND ALL INDIVIDUALS AND ENTITIES NAMED HEREIN TO THIS WARRANTY OF TRUTHFULNESS AND COMPLETENESS OF THE APPLICATION.

THE APPLICANT ACKNOWLEDGES THAT THE AUTHORITY'S INVITATION TO SUBMIT AN APPLICATION DOES NOT CONSTITUTE A COMMITMENT TO FINANCE THE PROPOSED DEVELOPMENT. **APPLICANTS MUST SUCCESSFULLY COMPLETE CREDIT UNDERWRITING AND OBTAIN ALL NECESSARY APPROVALS FROM THE BOARD OF DIRECTORS, AUTHORITY COUNSEL, AND THE CREDIT UNDERWRITER.**

_____	_____	_____
Applicant	Date	Signature of Witness
_____	_____	_____
Name and Title ((typed or printed)		Name (typed or printed)

NOTE: ORIGINAL APPLICATION MUST CONTAIN AN ORIGINAL SIGNATURE, OR THE APPLICATION WILL BE REJECTED AUTOMATICALLY

Exhibit 2

Describe in detail all resident programs and activities that will be provided by the Applicant. Each program mandated by the HFA or selected by the Applicant will be made a part of the Land Use Restriction Agreement. Developments that include a mix of elderly and non-elderly units must provide all resident programs mandated for both elderly and non-elderly developments. The resident programs to be provided are:

a. Resident programs for **All Applicants**:

b. Resident programs for **All Applicants**:

- Health Care – Mandatory** - Regularly scheduled visits by health care professionals such as nurses, doctors, or other licensed care providers. At a minimum, the following services must be provided at no cost to the resident: health screening, flu shots, vision and hearing tests. Regularly scheduled is defined as not less often than once each quarter. On-site space must be provided.
- Resident Activities – Mandatory** - Regularly scheduled, specified activities, planned, arranged, managed, and paid for by the Applicant or its management agent as an integral part of the management plan. The Applicant must develop and execute a comprehensive plan of varied activities such as holiday or special occasion parties, community picnics or cookouts, newsletters, children’s special functions, etc., to bring the resident together, foster a sense of community, and encourage community pride.
- On Site Voter Registration – Mandatory** – The Applicant or its Management Agent shall work with the County Supervisor of Elections to arrange on-site voter registration. The registration shall be at least quarterly, and shall be during weekend and other traditionally non-work times.
- Financial Counseling – Mandatory** – This service must be provided by the Applicant or its Management Agent at no cost to the resident. Financial counseling must include the following components; must be regularly scheduled, not less often than once each quarter; must be free of charge to the residents; must include tax preparation assistance by qualified professionals; must include educational workshops on such topics as “Learning to Budget”, “Handling Personal Finances”, or “Comparison Shopping for the Consumer”.
- Computer Training – Mandatory** - This training is made in conjunction with the requirement that the Applicant commit one computer for every 50 units, with software and internet access. The applicant must provide quarterly, on-site training classes, OR access to training software on basic computer skills such as word processing and spreadsheets to the residents.
- Hurricane Preparedness – Mandatory** - At least one month before each Hurricane Season, conduct training for residents on how to plan for hurricane and evacuation

protocols. At start of Hurricane Season, provide all residents written instructions on planning and evacuation.

- English as a Second Language – Optional** - Applicant shall make available, at no cost to the resident, a literacy tutor(s) to provide weekly English lessons to residents in private space on-site.
- Swimming Lessons – Optional** – The Applicant or its Management Agent shall provide on-site swimming lessons for children or adults, at no cost to the resident, at least three times each year.
- Life Safety Training – Optional** – The Applicant or its Management Agent shall provide on-site courses such as fire safety, first aid (including CPR), etc. at least twice each year, at no cost to the resident.
- Health and Nutrition Classes – Optional** – The Applicant or its Management Agent shall provide on-site classes, at no cost to the resident, at least 8 hours per year.
- Day Care – Optional** – either:
 - Day care facility for children or adults on-site, or
 - A discount of at least 20% at a day care facility for children or adults within 3 miles of the development.
- Case Management/Residential Stabilization/Services – Optional** – This service must be provided by a qualified social worker at no cost to the resident. This program requires that the following services be made available on-site no less often than once a week: crisis intervention, individual and family needs assessment, problem solving and planning, appropriate information and referral to community resources and services based on need, monitoring of ongoing ability to retain self-sufficiency, and advocacy to assist clients in securing needed resources.
- Smoking Cessation Classes – Optional for New Construction, Mandatory for Acquisition/Rehabilitation** – The Applicant or its Management Agent shall provide on-site classes, at no cost to the resident, at least 8 hours per year.

c. Residential Programs for **Elderly Developments:**

- Resident Assurance Check-In Program – Mandatory** – Applicant must provide and use an established system for checking in with each resident on a predetermined basis not less than once per day. Residents may opt out of this program with a written certification that they chose not to participate.
- Daily Activities – Mandatory** – Applicant or its Management Agent must provide supervised, structured activities at least five days per week. Activities must be on-site and at no charge to the residents.

- Meals – Optional** – Applicant must pay for daily, at least one meal per day, delivery and cost of meals to the residents or provide for the daily preparation and serving of meals in a designated common on-site facility. Programs such as “Meals on Wheels” will not qualify for points because Applicant is not providing the service.
 - Applicant will provide for delivery and cost of daily meals (at least one meal per day) to be served in a designated common facility located on-site; or
 - Applicant will arrange for daily meals, at least one meal per day, to be delivered to the residents at no cost to the residents.
- Private Transportation for the Development – Optional** – The Applicant or its Management Agent, at no cost to the resident, must provide a qualified driver and have a safe and serviceable vehicle that can transport residents to off-site locations for such things as medical appointments, public service facilities, and/or educational or social activities. A nearby bus stop or access to programs such as “Dial a Ride” will not be acceptable for purposes of this commitment.
- Assistance with Light Housekeeping, Shopping and/or Laundry – Optional** – Applicant must provide weekly assistance with at least two of the following: (1) light housekeeping, and/or (2) grocery shopping, and/or (3) laundry, at a rate which is at least 25% lower than market.
- Personnel On-Call 24 Hours Per Day – Optional** – Applicant must provide a manager, maintenance employee and/or security guard who is available and accessible to the residents 24 hours per day, seven days per week.

d. Resident Programs for **Non-Elderly Developments:**

- Homeownership Opportunity Program – Mandatory** – Applicant must provide a homeownership opportunity program available to all residents in compliance with their current lease. The program must set aside 5% of the resident’s gross rent toward a down payment for that resident when the resident moves from the development into homeownership. The resident may be suspended from the program during the period of a lease if the resident violates any provision of the lease. Upon renewal of the lease, the resident must be reinstated into the program for the period of that renewal, with suspension permitted under the same terms as discussed above. The homeownership opportunity program must also include financial counseling for all residents, with emphasis on credit counseling and other items necessary for successful purchase of, and maintenance of a home.
- First Time Homebuyer Seminars – Mandatory** – Applicant must arrange for and provide at no cost to the resident, in conjunction with local realtors or lending institutions, semiannual on-site seminars for residents interested in becoming homeowners.
- After School Program for Children – Optional** – Applicant or its Management Agent must provide daily, supervised, structured, age-appropriate activities for children

during the after-school hours. Activities must be on-site and at no charge to the residents.

Literacy Training – Optional – Applicant must make available, at no cost to the resident, a literacy tutor(s) to provide weekly literacy lessons to residents in private space on-site.

Job Training – Optional – Applicant must provide, at no cost to the resident, access to online regularly scheduled classes in typing, computer literacy, secretarial skills or other useful job skills. Regularly scheduled means not less often than once each quarter.

e. **Homeless, Veterans or Special Needs Housing:** The Applicant may propose appropriate Resident Programs. Attach as **Exhibit 10**.

3. Describe in detail all design and other physical amenities that provide enhanced quality of life, energy efficiency, increased security, handicapped accessibility, or other features. Each feature mandated by the Authority or selected by the Applicant will be made a part of the Land Use Restriction Agreement, and must be described behind tab labeled **Exhibit 11**. Developments that include a mix of elderly and non-elderly units must provide design features for both elderly and non-elderly units must provide design features for both elderly and non-elderly developments. The design and amenity features to be provided are:

a. In addition to meeting all building code, Fair Housing Act, and Americans with Disabilities Act Requirements, the following items are required:

- **Air conditioning** (window units are not allowed), in all units
- **Dishwasher**, in all new construction units
- **Garbage Disposal**, in all new construction units
- **Cable TV Hook-Up**, in all units
- **At least two full bathrooms** in all **3 bedroom or larger** new construction units
- **At least 1 and ½ bathrooms** (one full bath and one with at least a toilet and sink) in all new construction **2 bedroom units**
- **Full sized appliances** in all units
- **Bathtub** in at least one bathroom in new construction non-elderly units

b. **For New Construction Units**, the applicant may select items from the following list. The selected items must total 25 points:

Window Treatments (mini-blinds , curtains , vertical blinds) inside each unit. Select treatment that will be provided. (3 points)

30 Year Expected Life Roofing on all Buildings (5 points)

Gated community with “carded” entry or security guard , or if mid-or-high-rise, “carded” secure entry to building (2 points for gated community, 4 points for secure building entry)

- Exterior Finish - stucco or cementitious siding or brick exterior finish (3 points – check choice)
- Ceramic tile in bathtub/shower area (3 points)
- Microwave Oven (3 points)
- Fire Sprinklers in All Units (5 points)
- Steel entry door frames (2 points)
- Termite prevention/detection system (2 points)
- Exterior lighting (3 points)
- Double compartment kitchen sink (1 point)
- Laundry Hook-ups and space for washer/dryer inside each unit (3 points)
- Non-smoking units (may not choose with Non-Smoking Buildings (4 points)
- Non-smoking buildings (5 points)

c. For **Rehabilitation of Existing Development**, the applicant may select items from the following list. The selected items must total 25 points:

- Laundry Hook-ups and space for washer/dryer inside each unit (3 Points)
- Window Treatments (mini-blinds, curtains, vertical blinds) inside each unit – identify treatment: _____ (3 points)
- 30-Year Expected Life Roofing on all Buildings (4 points)
- Gated community with “carded” entry or security guard, or if mid-or-high rise, “carded” secure entry to building (3 points)
- Ceramic tile in bathtub/shower area (3 points)
- Microwave Oven (3 points)
- Marble Window Sills (3 points)
- Fire Sprinklers in All Units (4 points)
- Dishwasher inside each unit (3 points)

- Garbage disposals inside each unit (3 points)
- Steel entry door frames (2 points)
- Termite prevention/detection system (2 points)
- Exterior lighting (3 points)
- Non-smoking units (may not choose with Non-Smoking Buildings (4 points)
- Non-smoking buildings (5 points)
- Laundry Hook-ups and space for washer/dryer inside each unit (3 points)

d. For **Elderly Developments** or developments with elderly units, the applicant may select from the following list. The selected items must be on-site and total 16 points (2 points each):

- Emergency call service in all elderly units
- Hairdresser Shop or Barber Shop on site
- Laundry facilities available on every floor
- All bathrooms in elderly units handicapped accessible with grab-bars per ANSI requirements
- Public transportation within 150 feet of property (or elderly building if mixed family-elderly)
- Exercise room with appropriate equipment
- Community center or clubhouse
- Swimming pool
- Picnic area with at least three permanent picnic tables and a permanent outdoor grill
- Outside recreation facility (such as shuffleboard court, putting green, tennis court). Identify facility: _____
- Library consisting of a minimum of 100 books and 5 magazine subscriptions
- Craft Room
- Walking Trail
- Community Garden
- Dedicated movie room (new construction or rehabilitation)
- Movie room in common area (rehabilitation)

f. For **Non-Elderly Developments**, or developments with non-elderly units, the applicant may select from the following list. The selected items must be on-site and total 16 points (2 points each):

- Exercise room with appropriate equipment
- Community center or clubhouse
- Swimming pool

- Playground/tot lot (must be sized in proportion to development's size and expected resident population with age-appropriate equipment)
- Car care area (for car cleaning/washing)
- Childcare facility located within three miles of the property
- Public transportation located within one-half mile of the property
- Library/study room consisting of a minimum of 100 books and 5 magazine subscriptions
- Two or more parking spaces per unit
- Outside recreation area for older children (such as basketball court, tennis court, volleyball court, etc.). Identify facility:
_____.
- Community Garden
- Picnic area with at least three permanent picnic tables and a permanent outdoor grill

g. Energy Conservation Features for all units in the Development

Mandatory Features:

- Energy Star qualified refrigerator;
- Energy Star qualified dishwasher;
- Energy Star qualified washing machine, if provided by applicant;
- Minimum SEER of 14 for unit air conditioners (excluding buildings with a central chiller system);
- Low-VOC paint for all interior walls (50 grams per liter or less for flat paint; 150 grams per liter or less for non-flat paint);
- Low-flow water fixtures in bathrooms--WaterSense labeled products or the following specifications:
 - Toilets: 1.6 gallons/flush or less
 - Faucets: 1.5 gallons/minute or less
 - Showerheads: 2.2 gallons/minute or less.

Optional Green Building Features:

Applicant must choose at least five (5) items from the following list:

- Programmable thermostat in each unit
- Energy Star ceiling fans in all bedrooms and living areas
- Energy Star qualified roofing material or coating
- Energy Star exhaust fans in bathrooms
- Energy Star rating for all windows
- Install daylight sensors, timers or motion detectors on all outdoor lighting attached to buildings
- FL Yards and Neighborhoods certification on all landscaping
- Eco-friendly flooring -- Carpet and Rug Institute Green Label certified carpet and pad, bamboo, cork, recycled content tile, and/or natural linoleum
- Eco-friendly cabinets – formaldehyde free, material certified by the Forest Stewardship Council
- Motion detector on common area lighting