

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

INSTRUCTIONS

Please submit three copies of the application and attachments. Note: only one set of site plan and sample elevations (attachments 11 and 12 noted on page 22) are required.

An application fee, payable to the Massachusetts Department of Housing and Community Development, shall be submitted with the application. The schedule of fees is as follows:

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

Mail to:

Local Initiative Program
Department of Housing & Community Development
100 Cambridge Street, Suite 300
Boston, MA 02114
Attn: Toni Coyne Hall, Director of Local Initiative Program

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

If you have any questions, please refer to the DHCD 40B Guidelines, specifically Section VI. For further assistance, please contact Toni Coyne Hall at 617-573-1351 or toni.coyne.hall@state.ma.us.

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

Application Contents:

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

February 2010

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I. GENERAL INFORMATION

Community: _____
Name of Development: _____
Site Address: _____
Developer: _____

1. Type of Housing:
☐ Single Family house ☐ Rental
☐ Condominium ☐ Age Restricted

2. Project Characteristics:
☐ New Construction ☐ Conversion
☐ Rehabilitation ☐ Other

3. Total Acres _____ Density of Project (units/acre) _____

4. Unit Count:

Total Number of Units _____
Affordable _____
Market _____

5. Unit Prices/Rents:
Market Rate \$ _____
Affordable \$ _____

Required Signatures for the
Comprehensive Permit Project Application

Chief Executive Official of Municipality:	Chair, Local Housing Partnership (if applicable):
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Signature: _____ Signature: _____

Print Name: _____ Print Name: _____

Date: _____ Date: _____

II. COMMUNITY SUPPORT

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

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

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

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

Briefly explain the contributions: _____

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

III. MUNICIPAL CONTACT INFORMATION

Chief Elected Official

Name _____
Address _____
Phone _____
Email _____

Town Administrator/Manager

Name _____
Address _____
Phone _____
Email _____

City/Town Planner (if any)

Name _____
Address _____
Phone _____
Email _____

City/Town Counsel

Name _____
Address _____
Phone _____
Email _____

Chairman, Local Housing Partnership (if any)

Name _____
Address _____
Phone _____
Email _____

Community Contact Person for this project

Name _____
Address _____
Phone _____
Email _____

IV. DEVELOPMENT TEAM - CONTACT INFORMATION (include all development members)

Developer Name: _____
 Address: _____
 Phone _____
 Email _____
 Tax ID # _____

Lottery AgentName: _____
 Address: _____
 Phone _____
 Email _____
 Tax ID # _____

Contractor Name: _____
 Address: _____
 Phone _____
 Email _____
 Tax ID # _____

Housing
Consultant Name: _____
 Address: _____
 Phone _____
 Email _____
 Tax ID # _____

Architect Name: _____
 Address: _____
 Phone _____
 Email _____
 Tax ID # _____

Engineer Name: _____
 Address: _____
 Phone _____
 Email _____
 Tax ID # _____

Attorney Name: _____
 Address: _____
 Phone _____
 Email _____
 Tax ID # _____

Mkting/

TEAM EXPERIENCE - DEVELOPER QUALIFICATIONS

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

1. Developer:

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

2. Contractor: _____

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

3. Other Chapter 40B Experience

Have you or any members of your team had previous Chapter 40B experience with DHCD and/or other subsidizing agencies? ☐ Yes ☐ No

If yes, please explain. _____

4. Bankruptcy / Foreclosure

Have you or any entities you control ever filed for bankruptcy or have had a property foreclosed? ☐ Yes ☐ No

If yes, please explain. _____

DEVELOPER CERTIFICATION

The undersigned hereby certifies that he/she is _____ (Title) of _____ (Legal Name of Applicant) and that the information requested below for the project known as _____ (Project Name) is complete and that all information contained in this application is true and correct to the best of his/her knowledge. The undersigned Developer agrees to execute DHCD model documents, as required. If the Developer is other than a non profit corporation or public entity, the Developer hereby certifies that it shall comply with all reporting requirements described in 760 CMR 56.00 and as set forth in the LIP Guidelines.

Signature of Developer _____

Date _____

V. PROJECT INFORMATION

1.	Type of Housing	Total number of units
	Single Family House	_____
	Condo	_____
	Rental	_____
	Other	_____

2. Total Number of Units _____ Affordable _____ Market _____

3.	Project Style	Total number of units
	Detached single-family house	_____
	Rowhouse/townhouse	_____
	Duplex	_____
	Multifamily house (3+ family)	_____
	Multifamily rental building	_____
	Other (specify)	_____

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

5. Estimate the percentage of the site used for:

Buildings _____ Parking & Paved Areas _____
Usable Open Space _____ Unusable Open Space _____

6. Is any portion of the project designed for non-residential use? _____
If yes, explain the non-residential uses. _____

7. Sustainable Development Design and Green Building Practices

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

A. How will this development follow Sustainable Development Principles? _____

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

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

8. Project Eligibility

- A. Have you ever applied for a project eligibility letter involving any portion of the site, or are you aware of any prior application for a project eligibility letter involving any portion of the site?

☐ Yes ☐ No If yes, explain. _____

- B. Has the municipality denied a permit on another proposal for this site within the last 12 months? ☐ Yes ☐ No

9. Outstanding Litigation

Is there any outstanding litigation relating to the site? ☐ Yes ☐ No

If yes, explain. _____

10. Unit Composition

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

Type of Unit	# of Units	# of Bdrms	# of Baths	Gross Sq. Ft.	# of Parking Spaces	Sales Price/Rent	Condo Fee	Handicap Accessible
Affordable	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____
	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____
	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____
	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____
Market	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____
	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____
	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____
	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____
Other	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____
	_____	_____	_____	_____	_____	_____	_____	<input type="checkbox"/> # _____

VI. SITE INFORMATION

1. Total Acreage _____ Total Buildable Acreage _____

2. Describe the current and prior uses of the subject site:

Existing buildings on site? Yes ☐ No ☐

If yes, describe plans for these buildings: _____

3. Current Zoning Classification:

Residential _____ (minimum lot size) _____

Commercial _____ Industrial _____ Other _____

4. Does any portion of the site contain significant topographical features such as wetlands?

Yes ☐ No ☐ If yes, how many acres are wetlands? _____

If yes, attach map of site noting wetland areas.

Is map attached? ☐ Yes ☐ No

5. Is the site located within a designated flood hazard area?

Yes ☐ No ☐

If yes, please attach a map of the site with flood plain designations.

Is map attached? ☐ Yes ☐ No

6. Is the site or any building located on the site listed, nominated or eligible for listing on the National Register of Historic Places? Yes ☐ No ☐

7. Is the site within a Historic District? Yes ☐ No ☐

If yes, describe the architectural, structural and landscape features of the area: _____

8. In the past three years, have there been any defaults on any mortgage on the property or any other forms of financial distress?

Yes ☐ No ☐ If yes, please explain: _____

9. ☐ Indicate which utilities are available to the site:

Public Sewer ☐

Private Septic ☐

Public Streets ☐

Public Water ☐

Private Wells ☐

Private Ways ☐

Natural Gas ☐

Electricity ☐

On-site Sewer Treatment Facility ☐

Other ☐ Explain: _____

10. Describe any known or suspected hazardous waste sites on or within a ½ mile radius of the project site.

11. Has a 21E hazardous waste assessment ever been done on this site? If so, attach a summary of the filing. ☐ Yes ☐ No

12. What waivers will be requested under the comprehensive permit? _____

13. Describe the current status of site control and attach copies of relevant deeds or executed agreements.

A. ☐ Owned by Developer _____

B. ☐ Under Purchase and Sale Agreement _____

C. ☐ Under Option _____

Seller: _____ Buyer: _____

Is there an identity of interest between the Buyer and Seller? If yes, please explain: _____

Date of Agreement _____ Expiration Date _____

Extensions granted? Yes ☐ No ☐ Date of Extension _____

Purchase Price \$_____

VII. DESIGN AND CONSTRUCTION

1. **Drawings**

Please submit one set of drawings.

Cover sheet showing written tabulation of:

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

Site plan showing:

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

Utilities plan showing:

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

Graphic depiction of the design showing:

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

2. Construction Information

<u>Foundations</u>	# Mkt. Units	# Aff. Units	Attic	# Mkt. Units	# Aff. Units
Slab on Grade	_____	_____	Unfinished	_____	_____
Crawl Space	_____	_____	Finished	_____	_____
Full Basement	_____	_____	Other	_____	_____

<u>Exterior Finish</u>	# Mkt. Units	# Aff. Units	Parking	# Mkt. Units	# Aff. Units
Wood	_____	_____	Outdoor	_____	_____
Vinyl	_____	_____	Covered	_____	_____
Brick	_____	_____	Garage	_____	_____
Fiber Cement	_____	_____	Bicycle	_____	_____
Other	_____	_____			

Heating System

Fuel: ☐ Oil ☐ Gas ☐ Electric ☐ Other

Distribution method (air, water, steam, etc.): _____

Energy Efficient Materials

Describe any energy efficient or sustainable materials used in construction:

Modular Construction

If modular construction will be used, explain here:

Amenities

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

VIII. SURROUNDING AREA

1. Describe the land uses in the surrounding neighborhood.

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

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

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

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

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

IX. FINANCING

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

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

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

X. PROJECT FEASIBILITY

The section is for developers of home ownership projects.

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

Ownership Pro Forma

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

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

Profit Analysis (should conform to the pro forma)

Sources:

Affordable projected sales \$_____

Market sales \$_____

Public grants \$_____

(A) Total Sources \$_____

Uses:

Construction Contract Amount \$_____

(B) Total Development Costs \$_____

Profit:

(C) Total Profit (A-B) \$_____

(D) Percentage Profit (C/B) \$_____

Cost Analysis (should conform to the pro forma)

Total Gross Building Square Footage _____

Residential Construction Cost per Sq. Ft. \$_____

Total Hard Costs per Sq. Ft. \$_____

Total Development Costs per Sq. Ft. \$_____

Sales per Sq. Ft. \$_____

(do not include proceeds from public grants)

XI. DEVELOPMENT SCHEDULE

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

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

Please complete the following chart with the appropriate projected dates:

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

XII. MARKETING OUTREACH AND LOTTERY

Affirmative Fair Housing Marketing Plan:

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

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

XIII. CHECKLIST OF ATTACHMENTS

The following documentation must accompany each application:

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