



AFFORDABLE SENIOR HOUSING

A Scan of State Housing Credit Allocation Plans



ABOUT LEADINGAGE

We represent more than 5,000 aging-focused organizations that touch millions of lives every day. Alongside our members and 38 state partners, we address critical issues by blending applied research, advocacy, education, and community-building. We bring together the most inventive minds in our field to support older adults as they age wherever they call home. We make America a better place to grow old.

For more information: www.leadingage.org.

ABOUT NHT

The National Housing Trust creates and preserves affordable homes to provide opportunity, advance racial equity, reduce economic disparities, and strengthen community resilience through practice and policy. Using the tools of real estate development, finance, and policy advocacy in conjunction with sustainable practices, the Trust helped protect more than 36,000 affordable homes in all 50 states, leveraging more than \$1.2 billion in financing. We envision a world where all people have affordable, safe and sustainable homes that allow them to thrive unburdened by the harmful effects of climate change, racism and systemic barriers to opportunity.

For more information: www.nationalhousingtrust.org.

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Preface from LeadingAge

LeadingAge is pleased to present this nationwide scan of how states encourage the use of federal Low Income Housing Tax Credits for the development of affordable senior housing.

While Housing Credits come to state tax credit allocating agencies from the U.S. Department of the Treasury with certain requirements, state allocating agencies have significant latitude in their distribution of Housing Credits. How states use this latitude to the benefit of older adults is documented in this report.

How states use their Housing Credits is of great interest to LeadingAge. LeadingAge's housing policy priority is to expand the supply of affordable senior housing. Housing Credits have a critical role expanding the supply, as does the expansion of the Department of Housing and Urban Development's Section 202 Housing for the Elderly program and other HUD programs. Annual expenditures for the Housing Credit dwarf funding for new Section 202 homes. In 2020, the tax expenditure for Housing Credits was \$9 billion; in fiscal year 2020, \$90 million was appropriated for new homes through HUD's Section 202 program.

We hope this report helps stakeholders understand states' use of Housing Credits, by far the largest annual federal expenditure for affordable housing, for seniors with low incomes. The shortage of homes affordable to older adults with low incomes is nationwide. Each state has a responsibility to use its affordable housing resources commensurate with current and projected needs. LeadingAge hopes this report will help align scarce housing resources with needs.

We are deeply grateful for the work of the National Housing Trust, a trusted LeadingAge partner, in developing this report for us. Partnerships are how we move our goals forward, including partnerships of state allocating agencies and affordable senior housing stakeholders to reach our shared goal of expanding the supply of affordable senior housing.



Katie Smith Sloan

President and CEO, LeadingAge



Introduction



According to the Census Bureau, approximately 87 million people living in the United States will be 65 years of age or older by 2035, representing 20% of the overall population.¹ This unprecedented growth in the older adult population will strain the existing supply of affordable housing, with the number of older renters who are severely cost-burdened — those who pay over 50% of their income on housing — projected to rise by approximately three million by 2025.² Given little wealth or savings to sustain them in retirement, low income renters face the most acute housing difficulties as they age, and they are often forced to spend less on other necessities, such as healthcare, food, and supportive services.

Fortunately, the Low Income Housing Tax Credit program (Housing Credit program) is often used to produce and preserve affordable senior housing, with many states prioritizing and incentivizing this type of housing when allocating Housing Credits. Today, there are more than 800,000 Housing Credit-developed homes with a head of household who is 62 or older.³ In addition to providing direct incentives to produce or preserve affordable senior housing, many state agencies responsible for allocating the Housing Credit also encourage the inclusion of services and amenities that may benefit older adults, regardless of whether or not the housing is designated for this population.

This report examines how state Housing Finance Agencies are using the competitive 9% Housing Credits to serve older adults, by 1) incentivizing the production and preservation of affordable senior housing; and/or 2) encouraging the inclusion of services and amenities that may benefit them. The Housing Credit is a critical tool, along with Department of Housing and Urban Development programs like the Section 202 Supportive Housing for the Elderly program, for addressing the current and forthcoming lack of housing affordability for older adults, and this report is intended to serve as a resource for understanding the various ways states are working to ensure that older adults have access to affordable rental housing as they age.

1 U.S. Census Bureau. Older People Projected to Outnumber Children.

<https://www.census.gov/newsroom/press-releases/2018/cb18-41-population-projections.html>

2 Charette, A., Herbert, C., Jakobovics, A., Marya, E.E., & McCue, D.C. Projecting Trends in Severely Cost-Burdened Renters: 2015-2025.

<https://www.jchs.harvard.edu/research-areas/reports/projecting-trends-severely-cost-burdened-renters-2015%E2%80%932025>

3 A Call to Invest in our Neighborhoods (ACTION) Campaign. Supporting Seniors with the Low Income Housing Tax Credit.

<https://static1.squarespace.com/static/566ee654bfe8736211c559eb/t/5f17438c72beea563ed59313/1595360141903/ACTION+Issue+FS+-+Seniors+%28July+2020%29.pdf>

About the Low Income Housing Tax Credit Program

The Low Income Housing Tax Credit (Housing Credit) program is responsible for nearly all the affordable housing built or preserved in the United States today. Jointly administered by the U.S. Department of Treasury and state housing finance agencies (HFAs), the Housing Credit program has financed over 3.2 million homes since it was created in 1986, serving households with incomes at or below 60% of the area median income and, in some cases, households with incomes below 80% of area median income.

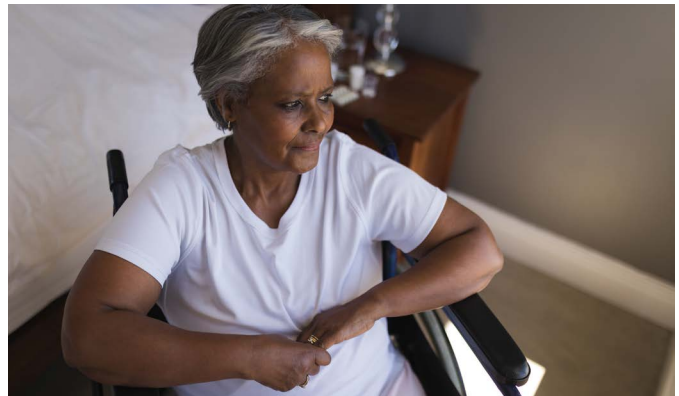
While the Housing Credit program is a federal program, it is administered at the state level, with Credits being passed from the U.S. Treasury to state HFAs, who then allocate them to individual developers proposing to create or preserve specific affordable housing developments. Federal statute requires states to include three preferences and 10 other selection criteria when allocating Credits to developers; beyond that, states have wide discretion in determining how to allocate Credits to address local housing needs and priorities. To allocate Credits, then, HFAs develop competitive scoring systems, with specific priorities and selection criteria outlined in the HFA's Qualified Allocation Plan (QAP).⁴ ⁵ Proposed developments earn points based on the criteria laid out in the QAP, with the highest-scoring applications receiving the highly coveted Housing Credits. This system gives individual HFAs the flexibility to prioritize the specific types of housing and amenities that meet the specific needs of their state.

In many states, applications for Credits far exceed supply, and applicants who do not receive Credits are often unable to move forward with their proposed project. For this reason, developers applying for Housing Credits will often design their projects to match the priorities of the QAP. The QAP, then, serves as a blueprint for how a state intends to allocate its Credits and illustrates the types of affordable housing developments the HFA wishes to fund. While the point system described above dictates how affordable housing developers apply for Credits, there are several ways by which a state can outline priorities and preferences:

- States can establish **set-asides**, reserving a portion of their total Credits for a certain type of development. Federal law requires that every state set aside 10% of their total allocation each year for projects sponsored by nonprofit organizations. Individual states have the authority to establish other set-asides of their choosing.
- States can assign **points** to the types of developments and development features they want to fund. Proposals earning the most points are awarded the Credits.
- By providing a **basis boost**, states can increase a property's eligible basis, effectively increasing the amount of Credits awarded to it. Though a basis boost will not increase a project's likelihood of being awarded Credits, it can increase a property's financial feasibility. While Federal law grants a 30% basis boost to all projects located in census tracts designated by HUD as either low income (a Qualified Census Tract, QCT) or a high-cost areas (a Difficult to Develop Area, DDA), the 2008 Housing and Economic Recovery Act (HERA) granted flexibility to the allocating agencies to extend the basis boost to buildings that they designate as requiring an increase in the credit amount to be financially feasible.

⁴ The Housing Credit program consists of two types of credits: the 4% credit and the 9% credit. The 4% credit, awarded along with private activity bonds, is subject to each state's private activity bond cap and is not subject to a competitive allocation process. The 9% credit, however, is highly competitive and the amount of credits that each state can allocate in a given year is determined by population size, with small states receiving a minimum allocation established regardless of population. For the purposes of this report, the term Housing Credits refers exclusively to the competitive 9% credit, and not the non-competitive 4% credit.

⁵ For the purposes of this report, "QAP" refers to the QAP itself and any scoring metrics identified in accompanying documents.



These various types of incentives can significantly shape the development of affordable rental housing in a given state. Because QAPs are such a powerful tool for influencing the type of affordable housing that is provided, advocating for certain preferences and priorities within a QAP can create meaningful change. Most QAPs are updated annually⁶, providing an opportunity for affordable housing stakeholders to participate in a state's QAP revision process. Though the specifics of each state's QAP process will differ, federal law requires each state to hold a public comment period, during which individuals and organizations are able to submit comments for the HFA to consider while preparing the updated QAP. Appendix B includes a list of each state's HFA homepage, which will lead users to information regarding the timeline for releasing a QAP for comment, the dates during which public comments are being accepted, and the process for submitting comments.

To impact a state's QAP, it is recommended that advocates familiarize themselves with their state's process and timeline, as well as the specifics of the current QAP. The remainder of this report provides a national overview of how states prioritize affordable senior housing and other amenities benefiting older adults in their QAP. To see how each individual state approaches affordable senior housing when allocating the Housing Credit, please see Appendix A, which contains a summary each QAP's incentives for providing affordable senior housing and related amenities.

⁶ Some states are on a 2-year QAP cycle and update their QAP every other year.

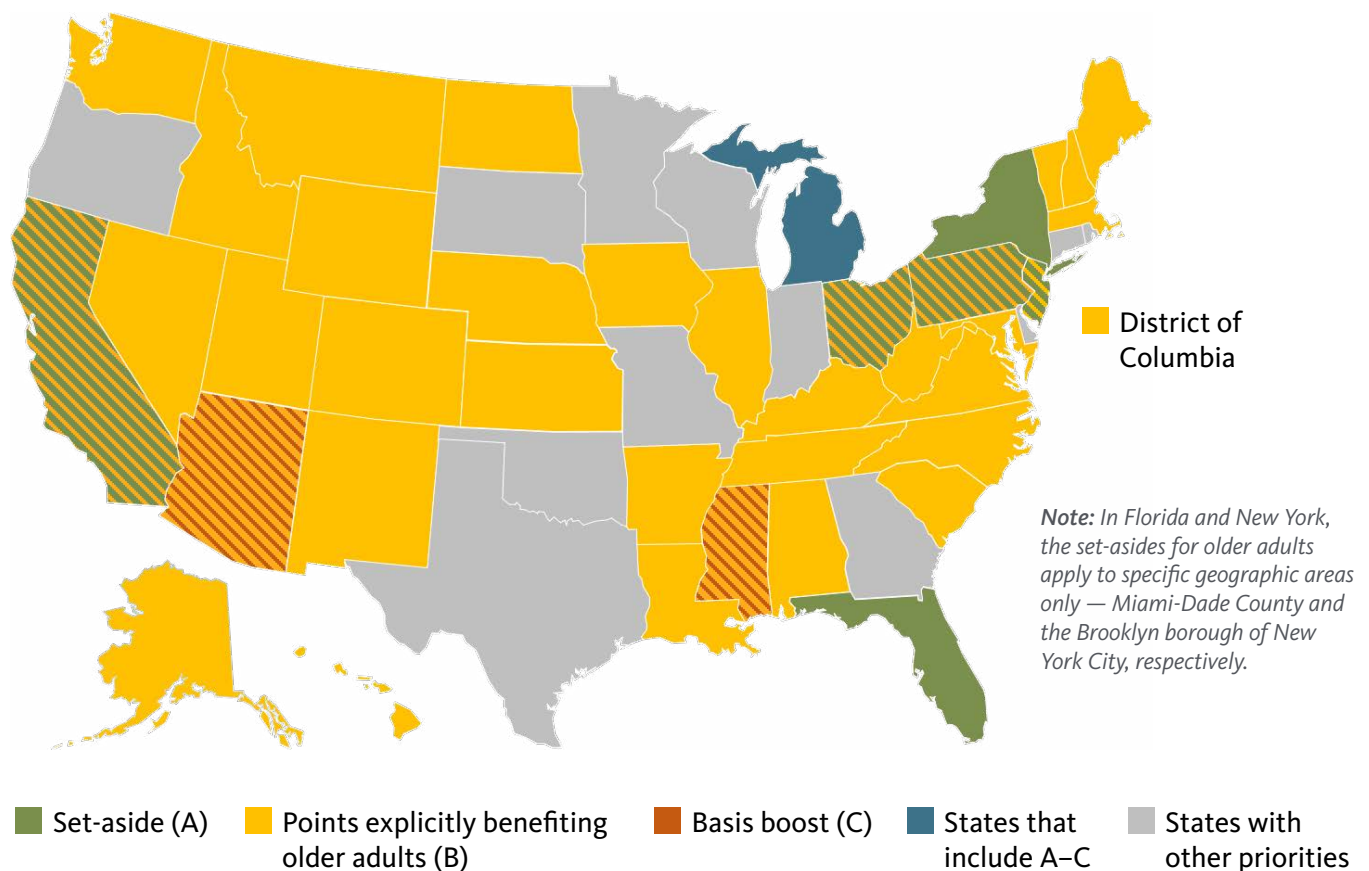
Analysis of State QAPs⁷

As discussed above, there are various ways by which an HFA can incentivize specific types of development. The following map illustrates how states across the country use a combination of these approaches to encourage the production and preservation of affordable housing specifically for older adults:

- Seven states set-aside a portion of their Housing Credits specifically for affordable senior housing;
- Thirty-eight states (including DC) award points to projects specifically serving older adults; and
- Three states provide a basis boost for projects serving older adults.

FIGURE 1

QAP INCENTIVES FOR OLDER ADULTS



⁷ This analysis includes the HFA from each of the 50 states, plus Washington, DC. While QAPs are updated annually and these updates take place according to the specific HFA calendar, the QAPs examined for this report were those that were current as of September 2020.

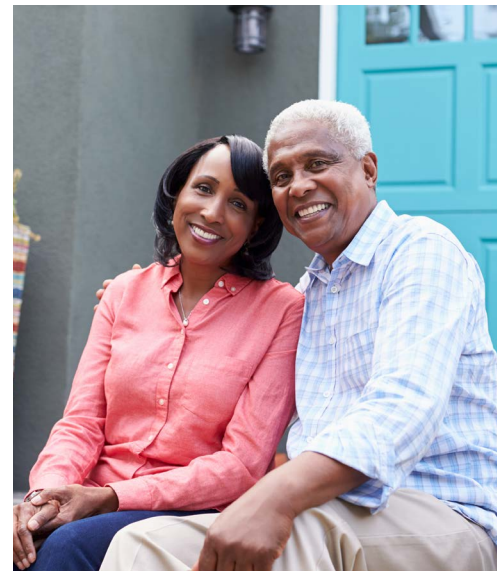
DEFINING AFFORDABLE SENIOR HOUSING

Understanding how states incentivize the creation and preservation of affordable rental housing requires first understanding how each state defines the population of older adults⁸ served by this housing. The Housing Credit program itself does not provide specific requirements regarding housing for older adults. Instead, properties must meet the standards of the Fair Housing Act, which provides three “qualifying tests” by which properties can qualify as housing for older persons:

1. Housing provided under any state or federal program that the Secretary of HUD has determined to be specifically designed and operated to assist elderly persons;
2. Housing that is intended for and 100% occupied by persons 62 years of age or older;
3. Housing that is intended for, and at least 80% of the units have at least one occupant, 55 years of age or older.⁹

While many state QAPs default to the exact definition provided in the Fair Housing Act when defining housing for older adults, some choose to use a definition that is narrower than that of the federal fair housing law. Forty state QAPs (including DC) use the Fair Housing Act definition — 17 by referencing the Fair Housing Act explicitly and by name, 5 by using the same language as that contained within the Fair Housing Act but without directly referencing it, and 18 (including DC) by not offering any definition of housing for older adults. (For states that do not provide any definition of older adults, this report assumes that they default to the definition provided by the Fair Housing Act.) The remaining 11 states use a definition with alternate requirements than those provided by the Fair Housing Act:

- **California, Delaware, Louisiana, Massachusetts, Pennsylvania, and West Virginia** all define affordable senior housing as only that in which 100% of occupants are 62 and over.
- **North Dakota and South Carolina** both define affordable senior housing as only that in which 80% of units are occupied by at least one person who is 55 or over.
- **Michigan**, likewise, defines affordable senior housing as that in which at least one occupant of each unit is 55 or over, though the definition goes on to state that all other members of the household must be 50 years of age or older.
- **Maryland** defines an older adult household as one in which at least one household member is age 62 or over.
- **Alabama** defines affordable senior housing as that in which 100% of occupants are 62 and over or that in which 100% of units are occupied by at least one resident aged 55 or older.



⁸ For the purposes of this report, the terms “housing for older adults” and “affordable senior housing” refer to any age-restricted housing intended for older adults. States may use different terminology, including, but not limited to, seniors and elderly, all of which is encompassed by this report’s use of “older adults.”

⁹ Johnson, A.J. Requirements for Tax Credit Senior Housing. http://services.housingonline.com/nhra_images/TCA%20Jan%202013%20-%20requirements%20for%20senior%20housing.pdf

TABLE 1

STATE DEFINITIONS OF HOUSING FOR OLDER ADULTS

State	Federal Fair Housing Act (FHA) Definition			Definition with alternate requirements to Federal FHA
	Direct Reference to FHA	Same definition as FHA without direct reference	No Definition*	
Alabama				✓
Alaska	✓			
Arizona	✓			
Arkansas		✓		
California				✓
Colorado			✓	
Connecticut			✓	
Delaware				✓
DC			✓	
Florida	✓			
Georgia		✓		
Hawaii			✓	
Idaho	✓			
Illinois		✓		
Indiana			✓	
Iowa	✓			
Kansas			✓	
Kentucky			✓	
Louisiana				✓
Maine	✓			
Maryland				✓
Massachusetts				✓
Michigan				✓
Minnesota			✓	
Mississippi		✓		
Missouri	✓			
Montana	✓			
Nebraska			✓	

* For states that do not provide any definition of older adults, this report assumes that they default to the definition provided by the Fair Housing Act.

TABLE 1, CONTINUED

STATE DEFINITIONS OF HOUSING FOR OLDER ADULTS

State	Federal Fair Housing Act (FHA) Definition			Definition with alternate requirements to Federal FHA
	Direct Reference to FHA	Same definition as FHA without direct reference	No Definition*	
Nevada		✓		
New Hampshire			✓	
New Jersey	✓			
New Mexico	✓			
New York			✓	
North Carolina			✓	
North Dakota				✓
Ohio			✓	
Oklahoma	✓			
Oregon			✓	
Pennsylvania				✓
Rhode Island			✓	
South Carolina				✓
South Dakota	✓			
Tennessee			✓	
Texas	✓			
Utah	✓			
Vermont			✓	
Virginia	✓			
Washington	✓			
West Virginia				✓
Wisconsin	✓			
Wyoming			✓	
TOTAL	17	5	18	11

SET-ASIDES FOR OLDER ADULTS

As illustrated on the map earlier in this report, the HFAs in 7 states have established a set-aside for older adults, either by reserving a percentage of their annual Housing Credits, reserving a specific dollar amount, and/or reserving a specific number of properties/units.

TABLE 2

SET-ASIDES FOR OLDER ADULTS

State	Percent of Total Housing Credits	Dollar Amount	Number of Properties/ or Units
California	✓		
Florida*			✓
Michigan	✓		
New Jersey	✓		
New York*		✓	✓
Ohio		✓	
Pennsylvania			✓

* In Florida and New York, the set-asides for older adults apply to specific geographic areas only — Miami-Dade County and the Brooklyn borough of New York City, respectively.

- In **California**, the Tax Credit Allocation Committee (TCAC) identifies various housing types and establishes goals for the percentage of Housing Credits to be allocated to each type. In the 2020 QAP, TCAC established a goal of allocating 15% of the state’s total Housing Credits to older adults.
- In **Florida**, Housing Credits are allocated through a series of Requests for Applications (RFAs) specific to various geographies and housing types. In the RFA specific to Miami-Dade County (RFA 2020-2023), Florida Housing Finance Corporation identifies the goal of funding one affordable senior housing property.
- In **Michigan**, 10% of the state’s Housing Credits are set-aside for affordable senior housing.
- In **New Jersey**, at least 20% of the state’s annual Credit allocation is set-aside for housing serving older adults through a separate Senior Cycle.
- The **New York** State Division of Housing and Community Renewal (HCR) reserves up to \$15 million to finance 1,000 units that are part of the New York City Housing Authority (NYCHA) and the New York City Department of Housing Preservation and Development (HPD) Seniors First Initiative. To be eligible, properties must be located in central Brooklyn.
- In **Ohio**, \$3 million is reserved for Senior Urban Housing, within the New Affordability pool.
- The **Pennsylvania** Housing Finance Agency reserves Housing Credits for a minimum of 2 properties in each of pool in which Credits are allocated (Urban pool, Non-Urban pool, and Nonprofit developer pool). Projects are required to demonstrate that services will be provided to residents to enable them to continue to live independently.

POINTS FOR OLDER ADULTS

The most common way for states to incentivize the provision of housing for older adults is by awarding points directly to these properties. A total of 27 states (including DC) provide points for projects that provide affordable senior housing, as shown in the second column in Table 3, below. Though awarding points for housing serving older adults may seem relatively straight forward, there are some nuances worth acknowledging, such as whether the points are exclusive to affordable senior housing:

- In **Idaho**, points are awarded to developments “that provide housing for older persons as defined in the Fair Housing Act.” These points are exclusive to affordable senior housing, meaning that housing that is not designated for older adults is not eligible for these points.
- In **Colorado**, points are awarded to properties serving tenant populations with special housing needs, described by the Colorado Housing and Finance Authority (CHFA) as including homeless, veterans, older adults, or those living with disabilities. While properties serving older adults are eligible for these points, the points are not exclusive to affordable senior housing.

Table 3 captures both points that are specific and exclusive to older adults, such as those awarded in Idaho, and points for which older adults and other housing types are eligible, such as those awarded in Colorado.

Beyond awarding points for providing affordable senior housing, 20 states award points for providing certain amenities in properties designated for older adults, as illustrated in the third column of Table 3, below. These amenities include features like service-enriched housing, on-site health services, and specific design elements. Like the description above, these points may be available for properties other than those serving older adults.

- In **New Hampshire**, points are available specifically and exclusively for affordable senior housing: “service enriched housing for age-restricted units,” described as “contracting with a VNA/homecare agency to provide on-site health clinics at no cost to residents (although Medicare and other insurances may be billed for services) for a minimum of ten years from initial occupancy. Health clinics may include, but are not limited to, flu shots, blood pressure, cholesterol and diabetes screening, and foot care. Clinics must be provided by a licensed healthcare professional. A minimum of 1/16 hour, per unit, per month is required to be provided no less frequently than bi-monthly.” While these points are awarded only if the services described are provided, only affordable senior housing is eligible for them.
- In **Pennsylvania**, points are awarded for providing services similar to those described in New Hampshire, above, though they are not exclusive to senior housing. Instead, points are awarded to “Designated Populations and Supportive Services,” noting that “to receive points in this category, the development will provide evidence that appropriate services will be provided for the entire resident population for the duration of the compliance period.” For projects designed for older adults, properties seeking to earn these points must deliver or coordinate services that “stabilize occupancy by improving residents’ ability to uphold their lease obligations throughout the aging process and enhance quality of life through improved access to services and benefits, health promotion, community building, and socialization.” Projects serving other populations, however, can earn these points by offering services particular to the resident population.
- Similarly, in **Nevada** points are available to both projects serving older adults and projects serving populations with special needs, if these projects incorporate removable cabinet fronts at all kitchen and bathroom sinks in all apartments. Like the points available in Pennsylvania, these points are not exclusive to properties for older adults.

Both of these incentive types — points for providing housing for older adults and points for certain features in properties serving adults — are included in the map in Figure 1.

TABLE 3

POINTS FOR AFFORDABLE SENIOR HOUSING

State	Awards Points for Providing Housing for Older Adults	Awards Points for Certain Features in Properties Serving Older Adults	State	Awards Points for Providing Housing for Older Adults	Awards Points for Certain Features in Properties Serving Older Adults
Alabama	✓		Montana	✓	
Alaska	✓	✓	Nebraska	✓	
Arizona	✓		Nevada		✓
Arkansas	✓	✓	New Hampshire		✓
California	✓	✓	New Jersey		✓
Colorado	✓		New Mexico	✓	✓
Connecticut			New York		
Delaware			North Carolina		✓
DC	✓		North Dakota	✓	✓
Florida			Ohio		✓
Georgia			Oklahoma		
Hawaii	✓	✓	Oregon		
Idaho	✓		Pennsylvania		✓
Illinois	✓		Rhode Island		
Indiana			South Carolina		✓
Iowa		✓	South Dakota		
Kansas	✓		Tennessee	✓	
Kentucky	✓	✓	Texas		
Louisiana	✓		Utah	✓	✓
Maine	✓	✓	Vermont	✓	
Maryland	✓		Virginia	✓	✓
Massachusetts		✓	Washington	✓	
Michigan		✓	West Virginia	✓	
Minnesota			Wisconsin		
Mississippi	✓		Wyoming	✓	
Missouri			TOTAL	27	20

BASIS BOOST FOR OLDER ADULTS

While the above components of a QAP — set-asides and points — are ways that HFAs can help ensure that certain types of projects receive Housing Credits, a basis boost allows HFAs to increase the eligible basis of a property that has already earned enough points to secure Housing Credits. Increasing a property's eligible basis effectively increases the amount of Credits awarded to it, making it more financially feasible. While states have the flexibility of assigning a basis boost of up to 30% (therefore increasing the eligible basis to 130%) to project types that match their priorities, federal law requires that a 30% basis boost be given to projects in DDAs and QCTs, as discussed earlier in this report. Beyond this federal requirement, three states provide a basis boost for projects serving older adults.

- In **Arizona**, a 5% basis boost is given to single story projects for older adults.
- In **Michigan**, Affordable Assisted Living developments, a specialized form of senior apartment housing that provides on-site personal care and health related services with rents priced at rates affordable to older adults with low to moderate incomes, are eligible for a 20% basis boost.
- In **Mississippi**, a 30% basis boost is given to properties targeting older adults.

FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Previous sections of this report identify the ways in which states prioritize housing specifically serving older adults. A number of states, however, provide points for the inclusion of certain development features or amenities that, while not specifically identified as serving older adults, likely benefit older adults regardless of whether the property is designated as affordable senior housing. While the specifics of these incentives vary widely,¹⁰ the groups below identify broad categories that capture the shared intentions of the incentives. Further, they've been grouped according to whether the incentive is for an on-site feature or an off-site amenity that is available to the larger community/neighborhood.

ON-SITE FEATURES:

- **Services/Service Coordinator**, which encompasses both service coordinators on-site for a specific number of hours each week and the provision of social services appropriate for the resident population;
- **Health programming**, including, but not limited to, blood-pressure screenings, home healthcare, and health screenings;
- **Accessible design features**, such as additional accessible, adaptable, and/or "visitable" units, or specific features such as grab bars in the bathroom;
- **Other amenities**, including a community room, computer room, and green space; and/or
- **Units for targeted populations**, such as veterans, disabled, and hearing and/or vision impaired.

OFF-SITE AMENITIES:

- **Proximity to healthcare**, such as a hospital, clinic, or doctor's office; and/or
- **Proximity to other amenities**, including, but not limited to, public transit, walking trails, library, and community center.

¹⁰ For the specific incentives in each state, please see Appendix A.

Some of these amenities/features are the same as those recognized in the third column of Table 3, such as health programming, on-site services, and accessible design features. The key difference, however, is whether or not the amenity is recognized within the QAP as specifically serving older adults. Table 3 recognizes amenities and features specific to affordable senior housing, awarding points only if the specific amenity is offered at a property serving older adults. Table 4, below, identifies features that may benefit older adults, although any type of property is eligible to receive these points, regardless of the resident population served.

- **Georgia** awards points for properties that provide on-site preventative health care. While older adults would undoubtedly benefit from this provision, the points are available to properties serving any population, not just older adults, so this feature is captured in the “Health Programming” column of Table 4, not Table 3.

While this distinction may seem subtle, it is significant when considering the provision of affordable senior housing. The features captured in this section surely benefit older adults, but because properties serving any population are eligible for them, the availability of these points does not increase the likelihood that properties specifically serving older adults will earn Housing Credits.

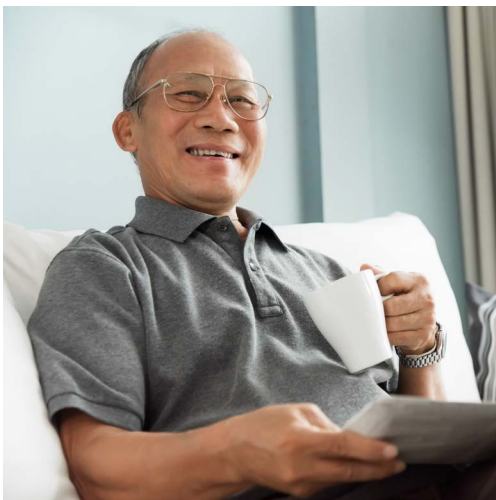


TABLE 4

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

State	On-Site					Off-Site	
	Resident Services/ Service Coordinator	Health Programming	Accessible Design Features	Other Amenities	Units for Targeted Populations	Proximity to healthcare	Proximity to Other Amenities
AL		✓	✓		✓	✓	✓
AK	✓				✓		
AZ					✓		✓
AR					✓	✓	✓
CA	✓		✓		✓	✓	✓
CO							✓
CT	✓						✓
DE	✓		✓		✓	✓	✓
DC	✓		✓				✓
FL						✓	✓
GA		✓				✓	✓
HI						✓	✓
ID				✓		✓	✓
IL						✓	✓
IN	✓	✓	✓	✓		✓	✓
IA							
KS							
KY			✓		✓	✓	
LA			✓	✓	✓	✓	✓
ME	✓				✓	✓	✓
MD	✓						✓
MA			✓				✓
MI			✓	✓			✓
MN			✓		✓		✓
MS	✓			✓	✓	✓	✓
MO			✓		✓		
MT	✓		✓			✓	
NE	✓	✓					

TABLE 4, CONTINUED

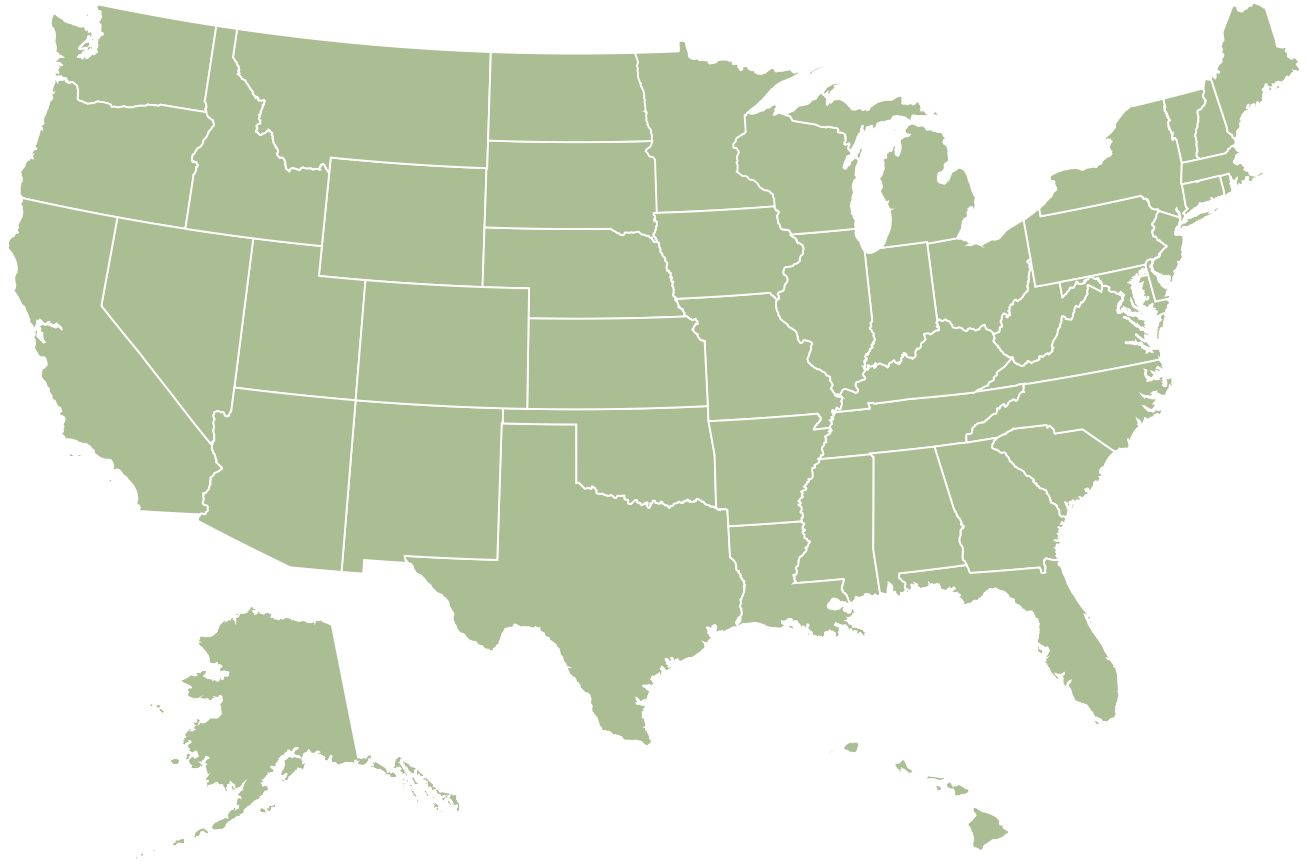
POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

State	On-Site					Off-Site	
	Resident Services/ Service Coordinator	Health Programming	Accessible Design Features	Other Amenities	Units for Targeted Populations	Proximity to healthcare	Proximity to Other Amenities
NV	✓		✓			✓	✓
NH				✓	✓		
NJ							✓
NM		✓			✓		✓
NY			✓		✓		✓
NC						✓	✓
ND			✓				
OH	✓					✓	✓
OK					✓		
OR	✓				✓		✓
PA			✓				✓
RI	✓			✓			✓
SC							✓
SD			✓	✓	✓	✓	✓
TN				✓	✓		
TX	✓			✓			✓
UT		✓	✓	✓			✓
VT	✓	✓	✓		✓	✓	✓
VA			✓	✓			✓
WA					✓		✓
WV	✓				✓		✓
WI			✓	✓		✓	✓
WY				✓		✓	✓
TOTAL	18	7	21	14	22	22	40

Conclusion

This report provides an overview of ways in which HFAs around the country prioritize affordable senior housing when allocating Housing Credits. This information can aid those advocating on behalf of older adults by having a baseline for incentives that are already available in each state. Additionally, by understanding the range of ways in which states incentivize housing and services for older adults, advocates will be well positioned to advocate for specific changes within their state's existing QAP.





APPENDIX A

2020 STATE QAPs

Alabama | 2020 QAP



State HFA homepage | Alabama Housing Finance Authority, <https://www.ahfa.com/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides a definition with alternate requirements to those within the Fair Housing Act:

- Housing intended for, and solely occupied by, persons 62 years of age or older; OR
- 100% of units have at least one person aged 55 years or older.

Additionally, all 100% Elderly projects must be one-story structures. Exception: Projects may have more than one story, provided elevators are to be installed to service all upper level apartments. Design exceptions, or deviations, must be reviewed by AHFA on an individual basis.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- 1 point will be given to projects with 100% of the units in the project designed, equipped and set-aside for the elderly.

Award points for certain features in properties designated for older adults:

- This state does not award specific points for features in properties designated for older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

State preferences include properties that offer tenant services that promote healthy living and quality of life through blood pressure screening.

Up to 25 points:

- 4 Points will be given for each of the following extra amenities:
 - » Clubhouse/Community Building/Community Room (must have at a minimum a kitchen with refrigerator/freezer, cabinets, and a sink with counter space), community meeting room (with seating and activity areas commensurate to total number of units), restrooms, community TV with cable, satellite or streaming services with a minimum of 42 inch screen TV, and wireless internet service. A community laundry must be included if not providing a washer/dryer in each unit and the community laundry must contain at least 1 washer and 1 dryer for every 25 units proposed in the project.

- 3 points for:
 - » Computer center (two or more computers with printer and internet access).
 - » Covered bus stop shelter (minimum 6' wide by 12' long) with 2 fixed bench seating underneath same cover (Must be separate/ independent of the mail kiosk unless location allows for proper access of bus to pick-up and drop off).
 - » Walking Trail with Benches (5 feet wide concrete and minimum of ¼ of mile long) Must be separate from required sidewalks.
- 2 points for:
 - » Emergency Pull Cord/Call Button (minimum of 1 in each unit).

Up to 5 points for tenant needs:

- 2 points will be given to projects that set-aside a minimum of 5% of the total proposed units for tenants with disabilities or homeless populations. The units must be actively marketed and rented to households with at least one tenant with a disability or a tenant transitioning from being homeless. A marketing and preference plan will be required at the time of the application, along with an executed Memorandum of Understanding.

- » Project standards: All tubs in designated handicap accessible units must come complete with “factory- installed grab bars” where the tub surrounds are reinforced.
- 1 point will be given to projects that provide at a minimum 5% of the dwelling units be designed and constructed to be readily accessible to individuals with mobility impairments. An additional 2% of the dwelling units must be accessible to individuals with sensory impairments (i.e., hearing or vision impairments).

Up to 10 points for neighborhood location:

- 2 points will be given for each of the following neighborhood services located within 3 miles of the site. Distance will be measured by odometer from the automobile entrance of the proposed project site to the closest automobile entrance to the parking lot of the applicable neighborhood service.
 - » Grocery Store;
 - » Pharmacy or Drug Store;
 - » Convenience Store;
 - » Bank or Credit Union; and
 - » Hospital or Doctor Office.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, AHFA seeks to promote the following housing priorities (not in order of preference):

- Projects that add to or significantly upgrade the existing affordable housing stock;
- Projects that, without Housing Credits, would not likely set aside units for lower income tenants, inclusive of tenants with disabilities and/or those who are homeless;
- Projects that use additional assistance through federal, state, or local subsidies;
- Projects that promote healthy living and tenant quality of life by providing tenant services such as blood pressure screening, CPR and first aid training, promoting nutrition and healthy eating, budget counseling, and various other quality of life services; and
- Balanced distribution of the Housing Credits throughout the State in terms of geographical regions, counties, urban, and rural areas.

Alaska | 2020 QAP



Alaska's GOAL (Greater Opportunities for Affordable Living) Program's Rating and Award Criteria Plan serves as the state's QAP. It includes funding criteria for LIHTC, HOME, SCHFD (Senior Citizens Housing Development Fund), and the national Housing Trust Fund.

State HFA homepage | Alaska Housing Finance Corporation, <https://www.ahfc.us/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

For awarding points for providing housing for older adults:

- 6 points for rehabilitation projects converting a non-senior property to senior housing.
- 8 points for Senior Housing Offset, awarded to projects primarily devoted to providing housing to qualifying Senior households. If funding with income restrictions encumbers more than 20% of the project units, no points will be awarded under this category.

For awarding points for certain features in properties serving older adults:

- Up to 8 points, for Number of Units Equipped for Persons with Physical Disabilities and Sensory Impairments.
- Number of “equipped units” as defined within this Rating and Award Criteria. For senior

developments, full points will be awarded if 100% of units are “equipped units.” For non-senior developments, full points will be awarded if 25% of units are “equipped units.”

Calculation: Senior Development

$$\text{Points} = \frac{\text{Number of 'Equipped Units' } \times 8}{\text{Total Number of Units in Property}}$$

Calculation: Non-senior Development

$$\text{Points} = \frac{\text{Number of 'Equipped Units' } \times 8}{\text{Total Number of Units in Property}} \times 0.25$$

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

3 points for service-enriched housing, which incorporates substantive social services for homeless and/or disabled Alaskans, on an ongoing basis.

- Points are only available if households with physical and/or mental disabilities, or homeless

persons will be served by the proposed project through hard set-aside units. Services must be tailored toward the populations served by the special needs set-aside units. Costs and the funding for these services must be included in the operating budget.

8 points for Projects which Serve Special Needs Populations:

- Points will be awarded for projects committing additional units (up to 50% of the residential units in the project) to special needs populations (defined below) above those commitments already required by their funding sources and the GOAL program.
- Calculation: $\text{Points} = (\text{number of special needs units not already required by the GOAL Program to satisfy the Special Needs threshold} \times 8) / (\text{number of Residential Units in Project} \times 50\%).$

- A “Special Needs” person or family consists of one or more of the following:
 - » Persons with a mental or physical disability;
 - » Persons/families whose annual income does not exceed 30% of the area median income, as determined by HUD, adjusted for family size. Note: Projects exclusively requesting SCHDF program funds will be excluded from earning points under this section for targeting households at or below 30% of area median income;
 - » Homeless persons (may include persons “overcrowded” as defined by AHFC).

2 points for Veterans Housing Preference:

- 2 points will be awarded to projects that contain a written commitment to giving a preference in the tenant selection criteria to households containing a veteran.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- 10% set-aside for tax-exempt organizations; and
- AHFC, at its discretion, may use the annual state tax credit cap and/or other program resources as deemed appropriate, or portion thereof, to engage in demonstration projects that fulfill the mission of AHFC and are consistent with this qualified allocation plan and the requirements of 26 U.S.C. Section 42 of the Internal Revenue Service Code.

Among other priorities identified by AHFC, when allocating Housing Credits they will target “special needs populations” (i.e., persons who experience mental or physical disabilities, homeless persons, and families whose income does not exceed 30% of the area median income, adjusted for household size).



State HFA homepage | Arizona Department of Housing (ADOH) <https://housing.az.gov/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- 5 points are available to independent living Housing for Older Persons Projects. The Applicant must not propose Units with more than 2 bedrooms.
 - » Applications proposing Housing for Older Persons Projects in which all Units include 2 or fewer bedrooms, and which insert the document listed below, are eligible for the 5 points in this scoring category.
 - ◇ Insert a description of the Project's specific design elements that serve the needs of Older Persons.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

Single Story Projects for Older Persons shall qualify for up to 105% of basis.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

15 points for TOD: Project is located in a certain proximity of a Frequent Bus Transit System (see Section 2.9(O)(2) and/or High Capacity Transit Station (see Section 2.9(O)(3):

5 points are available to Projects in which at least 50% of the Units in the Project will serve Families with at least 1 veteran, and a minimum of 25 units shall be set aside to serve the target population. Families may include households with 1 or more persons, but may not be used to exclude households with children.

- » Projects in which 50% of the total Project units will serve Families with at least 1 veteran, with a minimum of 25 Units set aside to serve the target population, insert each of the documents below, are eligible for the 5 points in this scoring category.
 - ◇ Insert a description of the Project's specific design elements that serve the needs of veterans;

- ◇ Insert letters of support and collaboration from the nearest Veterans Administration Hospital or community based outreach clinic and the Arizona Department of Veterans Services to demonstrate coordination of veteran-specific resources and services.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- Supportive Housing: 1 Permanent Supportive Housing Project that has a minimum of 30 Units set aside for Chronically Homeless households with a preference for veterans. The Permanent Supportive Housing Project awarded under this Set-Aside shall be designed such that 100% of the Units in the Project shall be Permanent Supportive Housing for Chronically Homeless individuals. Rents shall be designated at 30% AMGI and supported with Rental Assistance (see Section 2.9(P)/Tab 16 for further requirements and the ranking of Applications).
- Tribal: This Set-Aside is up to \$2,250,000 that may be used for more than 1 Project located on Tribal Land with a preference for veterans. A maximum of \$2,250,000 will not be exceeded in this Set-Aside. No partial awards will be made under this Set-Aside. The criteria and selection process for the Tribal Set-Aside are set forth in Section 2.9(Y)/Tab 25 of this Plan.
- Balance of State: 3 Projects located in Balance of State Areas; each Project located in a separate Balance of State COG Area (“NACOG”, “WACOG”, “SEAGO” and “CAG”) to the extent possible. Should Applications be received for fewer than three Balance of State COG Areas, up to two Projects may be funded in one Balance of State COG Area. Tribal Projects are ineligible for the Balance of State Set-Aside.
- Non-profit: 10% of the State’s annual credit is Set-Aside for “Non-Profit Projects” as defined in this Plan. Only Non-Profit Projects that meet all of the threshold requirements in Section 2.9(E) will be eligible for an Allocation of Non-Profit Set-Aside credits. If a Non-Profit Project qualifies for an Allocation in another Set-Aside, as stated in this Section 2.6, it will also contribute to satisfying the 10% of the State’s annual credit requirement for the Non-Profit Set-Aside.
- State Special Project: ADOH may award 1 Project in the Department’s sole discretion that does not score high enough to receive an Allocation in the other Set-Asides or the General Pool but scores at least 60 points and meets general and specific goals, threshold, and underwriting requirements of this Plan.



State HFA homepage | Arkansas Development Finance Authority, <https://adfa.arkansas.gov/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state uses the same definition as the federal Fair Housing Act without referencing it directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- 4 points will be given to developments with 100% of the units in development designed, equipped and set-aside for elderly.

Award points for certain features in properties serving older adults:

- 2 points for proximity to amenities, including senior center (for 100% elderly properties only).

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

4 points will be given for Supportive Housing for disabled persons (as defined in Section I(A) above) with a minimum of 30% of the units for such special needs tenants. The applicant must submit a statement:

1. Describing the design and construction of the development that will meet the needs of the disabled population served;
 2. Describing the on-site support services that will meet the needs of the disabled population served; and
 3. Stating the supportive services will be optional to the disabled population served.
 - » The proposed service provider must submit a statement describing:
 1. The disabled population to be served;
 2. The needs of the disabled population to be served; and
 3. The service to be provided to the disabled population served, including frequency of provision.
- OR —
- 4 points will be given for 100% Assisted Living housing.

Up to 16 points available for site selection, assuming site amenities are suitable for the population served. 2 points each:

- Grocery Store or Supermarket;
- Pharmacy or Drug Store;
- School, daycare or educational center (cannot be awarded if 100% elderly only property);
- Public park or Green Space, as defined in Section I(A) (does NOT include school grounds);
- Book lending public library;
- Daily operated senior center or facility offering daily services for seniors (can be awarded only if 100% elderly only property);
- Hospital, health clinic or medical doctor's office (medical doctor's office must have a general practitioner);
- Public transportation; and
- Access to designed pedestrian trails.

OTHER PRIORITIES

In addition to the incentives for senior affordable housing, above, the state awards a 30% basis boost to properties funded, in part, by Rural Development.

California | 2020 QAP



State HFA homepage | California Tax Credit Allocation Committee (CTCAC)
<https://www.treasurer.ca.gov/ctcac/tax.asp>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides a definition with alternate requirements to those within the Fair Housing Act:

- All units shall be restricted to residents who are 62 years of age or older.

SET-ASIDES

In 2020, CTCAC established a goal of allocating 15% of total Housing Credits to projects designated for older adults.

POINTS

Award points for providing housing for older adults:

- 10 points awarded to senior projects under Housing Needs section.

Award points for certain features in properties serving older adults:

- 3 points. For a Senior Development, the site is within ½ mile of a daily operated senior center or a facility offering daily services specifically designed for seniors (not on the development site) (1 mile for rural set-aside projects).
 - » Or within a ¾ mile (1.5 miles for Rural set-aside projects) 2 points.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Up to 15 points for site amenities. Must be appropriate for the tenant population served.

Transit amenities:

- 7 points: The project is located where there is a bus rapid transit station, light rail station, commuter rail station, ferry terminal, bus station, or public bus stop within ½ mile from the site with service at least every 30 minutes (or at least two departures during each peak period for a commuter rail station or ferry terminal) during the hours of 7–9 a.m. and 4–6 p.m., Monday through Friday, and the project's density will exceed 25 units per acre.
- The site is within ½ mile of a bus rapid transit station, light rail station, commuter rail station, ferry terminal, bus station, or public bus stop with service at least every 30 minutes (or at least two departures during each peak period for a commuter rail station or ferry terminal) during the hours of 7–9 a.m. and 4–6 p.m., Monday through Friday.
- The site is within ½ mile of a bus rapid transit station, light rail station, commuter rail station, ferry terminal, bus station, or public bus stop with service at least every 30 minutes (or at least two departures during each peak period for a

commuter rail station or ferry terminal) during the hours of 7–9 a.m. and 4–6 p.m., Monday through Friday.

- 4 points: The site is located within ½ mile of a bus rapid transit station, light rail station, commuter rail station, ferry terminal, bus station, or public bus stop. (For Rural set-aside projects, full points may be awarded where van or dial-a-ride service is provided to tenants, if costs of obtaining and maintaining the van and its service are included in the budget and the operating schedule is either on demand by tenants or a regular schedule is provided).
- 3 points: The site is located within ½ mile of a bus rapid transit station, light rail station, commuter rail station, ferry terminal, bus station, or public bus stop.
- In addition to meeting one of the point categories described above, the applicant commits to provide to residents free transit passes or discounted passes priced at no more than half of retail cost. Passes shall be made available to each Low-Income Unit for at least 15 years. These points are not available for projects with van service. These points are only available to Rural set-aside projects with dial-a-ride service for free or discounted dial-a-ride passes.
 - » 3 points. At least one pass per Low Income Unit.
 - » 2 points. At least one pass per each 2 Low Income Units.
- “Light rail station” or “commuter rail station” or “ferry terminal” includes a planned rail station or ferry terminal whose construction is programmed into a Regional or State Transportation Improvement Program to be completed within one year of the scheduled completion and occupancy of the proposed residential development.
- A private bus or transit system providing service to residents may be substituted for a public system if it (a) meets the relevant headway and distance criteria, and (b) if service is provided free to the residents. Such private systems must receive approval from the CTCAC Executive Director prior to the application deadline. Multiple bus lines may be aggregated for the

above points, only if multiple lines from the designated stop travel to an employment center. Such aggregation must be demonstrated to, and receive prior approval from, the CTCAC Executive Director in order to receive competitive points.

- 3 points. The site is within ½ mile of a public park or a community center accessible to the general public (1 mile for Rural set-aside projects). A public park shall not include 1) school grounds unless there is a bona fide, formal joint use agreement between the jurisdiction responsible for the parks/ recreational facilities and the school district or private school providing availability to the general public of the school grounds and/or facilities, 2) greenbelts or pocket parks, or 3) open space preserves or biking parkways unless there is a trailhead or designated access point within the specified distance.
- 2 points. For within ¾ mile (1.5 miles for Rural set-aside projects).
- 3 points. The site is within ½ mile of a book-lending public library that also allows for inter-branch lending (when in a multi-branch system) (1 mile for Rural set-aside projects).
 - » 2 points: or within 1 mile (2 miles for Rural set-aside projects).
- 3 points. The site is within ½ mile (for Rural set-aside projects, 1 mile) of a qualifying medical clinic with a physician, physician’s assistant, or nurse practitioner onsite for a minimum of 40 hours each week, or hospital (not merely a private doctor’s office). A qualifying medical clinic must accept Medi-Cal payments, or Medicare payments for Senior Projects, or Health Care for the Homeless for projects housing homeless populations, or have an equally comprehensive subsidy program for low-income patients.
- 2 points. The site is within 1 mile (for Rural set-aside projects, 1.5 miles) of a qualifying medical clinic with a physician, physician’s assistant, or nurse practitioner onsite for a minimum of 40 hours each week, or hospital.
- A hospital demonstrated at the time of application to be under construction and to be

completed and available to the residents prior to the housing development completion is considered in place at the time of application for purposes of this scoring factor.

- 2 points. The site is within ½ mile of a pharmacy (for Rural projects, 1 mile).
 - » 1 point: or within 1 mile (2 miles for Rural projects).

Service Amenities:

Up to 10 points for projects that provide high-quality services designed to improve the quality of life for tenants. Services must be appropriate to meet the needs of the tenant population served and designed to generate positive changes in the lives of tenants, such as by increasing tenant knowledge of and access to available services, helping tenants maintain stability and prevent eviction, building life skills, increasing household income and assets, increasing health and well-being, or improving the educational success of children and youth.

- Health and wellness services and programs. Such services and programs shall provide individualized support to tenants (not group classes) and need not be provided by licensed individuals or organizations. Includes, but is not limited to visiting nurses programs, intergenerational visiting programs, or senior companion programs. The application must describe in detail the services to be provided.
 - » 5 points. 100 hours of services per year for each 100 bedrooms.
 - » 3 points. 60 hours of services per year for each 100 bedrooms.
 - » 2 points. 40 hours of services per year for each 100 bedrooms.

Up to 2 points for Enhanced Accessibility and Visitability. Project design incorporates California Building Code Chapter 11(B) and the principles of Universal Design in at least half of the project's Low Income Units by including:

- Accessible routes of travel to the dwelling units with accessible 34" minimum clear-opening-width entry, and 34" clear width for all doors on an accessible path.

- Interior doors with lever hardware and 42" minimum width hallways.
- Fully accessible bathrooms complying with California Building Code (CBC) Chapter 11(A) and 11(B). In addition, a 30"x48" clearance parallel to and centered on the bathroom vanity.
- Accessible kitchens with 30"x48" clearance parallel to and centered on the front of all major appliances and fixtures (refrigerator, oven, dishwasher and sink).
- Accessible master bedroom size shall be at least 120 square feet (excluding the closet), shall accommodate a queen size bed, shall provide 36" in clearance around three sides of the bed, and shall provide required accessible clearances, free of all furnishings, at bedroom and closet doors. The master bedroom closet shall be on an accessible path.
- Wiring for audio and visual doorbells required by UFAS shall be installed.
- Closets and balconies shall be located on an accessible route.
- These units shall, to the maximum extent feasible and subject to reasonable health and safety requirements, be distributed throughout the project consistent with 24 CFR Section 8.26.
- Applicant must commit to obtaining confirmation from a Certified Accessibility Specialist that the above requirements have been met.

10 points for special needs projects.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- 10% nonprofit set-aside;
 - » Each funding round, credits available in the Nonprofit set-aside shall be made available as a first priority, to projects providing housing to homeless households at affordable rents, consistent with Section 10325(g)(3) in the following priority order:
 - ◇ First, projects with 1) McKinney-Vento Homeless Assistance Act, MHP-Supportive Housing Program, HCD Veterans Housing and Homeless Prevention Program, Mental Health Services Act (MHSA), CalHFA Local Government Special Needs Housing Program, Governor's Homeless Initiative, Housing for a Healthy California, or HCD No Place Like Home development capital funding committed for which the amount of development capital funding committed shall be at least \$500,000 or

\$10,000 per unit for all Low-Income Units in the project (irrespective of the number of units assisted by the referenced programs), whichever is greater; or 2) projects with rental or operating assistance funding commitments from federal, state, or local governmental funding sources. The rental assistance must be sponsor-based or project-based and the remaining term of the project-based assistance contract shall be no less than 1 year and shall apply to no less than 50% of the Low-Income Units in the proposed project. For local government funding sources, ongoing assistance may be in the form of a letter of intent from the governmental entity.

- ◇ Second, other qualified homeless assistance projects.
- 20% rural set-aside;
- 5% at-risk set-aside; and
- 4% special needs set-aside.



State HFA homepage | Colorado Housing and Finance Authority, <http://www.chfainfo.com/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- 8 points for tenant populations for special housing needs, including homeless, veterans, seniors, or those living with disabilities:
 - » 8 points may be earned for the set-aside of at least 25% of the units for special needs tenant populations. (The minimum set-aside of 25% may be reduced if any federal or state regulations restrict the number of special needs units in a project or if the Applicant can demonstrate a successful business model based on track record of serving specific special needs populations. Such exceptions will be considered on a case-by-case basis

and only with documentation provided at the time of Application.)

- » For points in this section, only one of either Special Needs or Homeless may be selected. Projects claiming points in this section cannot also claim points under Section 5.A.1.(d).
- » The project must provide supportive services that might include, but are not limited to, case management, job training and/or placement, continuing education, transportation, childcare, and health care. These services must be provided by a service provider(s) with a minimum of three years of experience in the related field of service provision.
- » Applicant must provide the following to receive points:
 - ◇ A narrative outlining the comprehensive service plan for the proposed project; and
 - ◇ A funding budget for services and demonstration of an adequate level of staffing; and
 - ◇ Memoranda of Understanding (MOUs) from service providers (which must be executed and dated by both parties), including in-kind service providers, and

demonstration of a minimum of three years of experience; and

- ◇ Evidence of a homeless or special needs client source (e.g., letters from referring agencies, marketing plans, etc.) and demonstration of an adequate demand for the selected set-aside; and
- ◇ Resume(s) for service providers.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

5 points for project location:

- 5 points may be earned for proposed projects to be located in a community that has an identified community housing priority (e.g., supports a local, regional, or State plan; a neighborhood plan or some other community-sponsored need assessment; master plan; etc.) or to be located at an existing or planned TOD site. Applicant must provide evidence, clearly demonstrating the project fits into the community's need (choose only one).
 - » A TOD site is defined as that which is within a half-mile of transit corridors with easy access to job center. Housing proposal should maximize allowable density at TOD site.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state priorities other types of development through these set-asides:

- 10% nonprofit set-aside;
- Choice Neighborhoods Implementation Set-aside:
 - » Starting in Tax Credit year 2018 through Tax Credit year 2021, a three-year set-aside is being provided for Sun Valley Redevelopment, sponsored by the Denver Housing Authority (DHA), which is located at Decatur Street and West 10th Avenue in Denver and received a Choice Neighborhoods Implementation Grant award of \$30 million. The set-aside is being provided for the project due to the following expected benefits to its community as well as the entire State:
 - ◇ Bringing in millions of federal dollars that would otherwise not be available to the State.
 - ◇ Preservation of affordable public housing by transforming aging and obsolete public housing projects into vibrant mixed-use development.
 - ◇ Sun Valley Redevelopment received a set-aside amount of \$1,350,000 in annual Tax Credits in 2018. Thereafter during the three-year period, the annual Tax Credit amount may fluctuate but will not exceed the maximum Tax Credit award pursuant to the applicable year's QAP. The aggregate set-aside for this project will not exceed \$4,050,000.
 - ◇ The set-aside will continue to be incorporated into the QAPs for the years of 2020 and 2021. Each QAP for those years will be subject to approval by the Governor. Each Application for Tax Credits will be subject to all requirements of the corresponding year's QAP, including the requirement

that no more Tax Credit will be reserved for the project than CHFA determines is necessary for the project's financial feasibility and viability as a low-income housing project.

- ◇ Additionally, CHFA recognizes the unique challenges of developing housing for certain populations and in certain geographic areas, and has identified the

following priorities. Projects are not required to meet a priority to receive an award of Federal Credits or State Credits.

- » Projects serving Homeless Persons;
- » Projects serving Persons with Special Needs; and
- » Projects in counties with populations of less than 175,000.



State HFA homepage | Connecticut Housing Finance Authority, <https://www.chfa.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

1 point available for providing on-site resident services coordinator.

- On-site resident services coordinator, working a minimum of 20 hours per week. Property budget line item or evidence of arrangement with a third party provider specifying the funding source is required, as well as an executed “Acknowledgment of Guidelines for Resident Service Coordinators.”

Up to 4 points for TOD.

- “Transit Oriented Development” for the purposes of the LIHTC program means the development of multi-family residential apartments within walking distance of public transportation stations serving rapid transit bus services or rail. (For the complete definition, please refer to the Glossary.) Applicants shall provide maps evidencing the distance of a pedestrian’s path to the transportation hub or transit station. Points are available up to a maximum of 4 and may be awarded based on the following criteria:
 - » 2 points: Mixed income development located within a half mile of an existing station or hub along the CTfastrak corridor or the Hartford

rail line, Shoreline East or MetroNorth's New Haven, New Canaan, Danbury and Waterbury lines.

- » 4 points: Mixed use development that includes neighborhood amenities such as pharmacy, restaurant, market, studio or other retail/commercial/cultural

opportunity(ies) that encourage community revitalization. Such commercial aspect of the Proposed Development must: (i) have its own exterior entrance, (ii) comprise at least 10% of the building area on the floor(s) of its location, and (iii) comprise at least 500 square feet.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state priorities other types of development by establishing the following threshold requirements. All proposals must meet at least one of the following priorities:

- Enhance housing mobility and choice across income levels and promote vibrant, mixed-income neighborhoods through rental opportunities;
- Support adaptive reuse of historic and other existing structures for use as residential housing;
- Support local efforts to develop appropriate urban infill housing and neighborhood amenities to make better use of limited urban land;
- Promote housing and/or affordable housing as part of mixed use and transit oriented developments within walking distance of public transportation facilities;
- Revitalize rural villages and main streets by promoting the rehabilitation and appropriate reuse of historic facilities, such as former mills, to allow a concentration of higher density or multiple use development where practical and consistent with historic character;
- Access to parks and recreational opportunities, including trails, greenways, community gardens and waterways, for affordable and mixed-income housing;
- Focus on infill development and redevelopment opportunities in areas with existing infrastructure, such as in cities or town centers, which are at an appropriate scale and density for the particular area; or
- Promote the continued use or adaptive reuse of existing facilities and developed prosperity, including brownfields in strategic locations.

Delaware | 2020 QAP



State HFA homepage | Delaware State Housing Authority, <http://www.destatehousing.com/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides a definition with alternate requirements to those within the Fair Housing Act:

- For the purposes of this QAP, DSHA defines an elderly development as one where all residents are 62 or older or any housing that is specifically designed and operated to assist elderly persons, as defined in a state or federal program (i.e., Rural Development or U.S. Department of Housing and Urban Development (HUD) or FHA Risk Share).

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Up to 5 points for provision of social services:

- DSHA is committed to assuring that owners provide a variety of services to residents of developments utilizing our resources. By providing a foundation of stable housing, complemented with population appropriate services to residents, quality of life is improved. In order to encourage the provision of such services, DSHA will award up to 5 points to applicants that commit to providing certain qualified social services to the proposed development's residents. Scoring will be awarded as follows:

Points	Number of Qualified Social Services
2	1
3	2
5	3

- The services must be distinct to qualify for the points. For example, a series of financial literacy classes, even on different topics would count as one service, or two nutrition classes, even if offered by different providers, would count for 1 point. Social services must be actively linked to residents and not simply provided to the

community at large. They may be provided on site or off site.

- Minimum service thresholds must be met for each service point sought, including:
 - » The service must be provided to the development's residents for at least 4 hours in every calendar quarter for a total of 16 hours per year;
 - » Services must be provided free of charge to the tenants and be appropriate, available, and accessible;
 - » Transportation must be provided for any off-site services; and
 - » There must be procedures in place for documenting and tracking utilization and outcomes of services.
- The application must include the following:
 - » The cost and source to pay for the services, if any;
 - » A Comprehensive Social Services Plan describing all services proposed that includes:
 - ◇ Narrative describing the services to be provided;
 - ◇ A marketing plan;
 - ◇ The name and qualifications of any service organizations that will be utilized, including their history, capacity, and experience; and
 - ◇ The transportation plan for any off-site services, signed by the transportation provider and service provider, if applicable.
 - » Separate DSHA Form MOUs or substantially-similar agreements for each service provider included in the Plan.
- Services may include: Parenting Programs, Literacy Programs, Daycare, Job Training, Nutritional Programs, Financial Counseling, Transportation, Public Benefits Counseling — such as providing support to help tenants determine eligibility and apply for public benefits, and Exercise/Healthy Lifestyle.
- Additional social services may be approved in advance by DSHA. Applicants receiving points in this category that subsequently fail

to provide the social service at any time during the compliance period will receive penalty points in any future application equal to the points that were awarded that were deemed ineligible.

Up to 5 points for access to transit:

- A development will be awarded 0–5 points for including development amenities and facilities to accommodate new transit. To score these points, applicant must demonstrate the site is transit ready and providing new public transit infrastructure/amenities. Process and procedures for demonstrating Access to Transit are described with particularity in the Access to Transit Certification in Exhibit 24. Please note: The Certification is required at application. A Memorandum of Agreement (MOA) with Delaware Transportation Corporation will be executed as part of the carryover requirements after a preliminary reservation of tax credits are awarded and after DSHA review and approval. If the MOA is finalized, executed, or otherwise submitted in any form other than draft, applicant will not be eligible for points.

Up to 10 points for proximity to amenities, including walk-in medical facility/hospital:

- For projects located in municipalities and incorporated areas, the amenity must be within the noted mile radius of the project to be eligible for points. For projects located in unincorporated areas of the State or rural areas whether incorporated or unincorporated (as designated by USDA), including New Castle, Kent, and Sussex Counties, services must be 1.5 x of the noted mile radius of the project.
- USDA designated rural areas can be found at the following link: <http://eligibility.sc.egov.usda.gov/eligibility/welcomeAction.do?pageAction=sfp&NavKey=property@12>.
- Distance must be measured along an existing right of way; exact distances from project entrance must be referenced for each amenity claimed. At least one picture should be submitted for each amenity claimed. Amenities must be noted in the market study with distances documented. Applicants may only score once for each amenity, for example if there

is a grocery store within .5 mile of the project and a second store within 1 mile of the project, the applicant will score 3, not 5 points.

- Negative points will only be deducted from points earned in the Amenities category and will not reduce the base score for the application. Nothing in this category alters or waives threshold siting or environmental criteria. For this Amenities category, half points will be rounded down and only full points will be included in final application scoring (see table below).

Up to 10 points for integrated housing for special populations:

- 10 points will be awarded to applicants who increase the number of target units set aside for special population-eligible units to the greater of 10% or 6 units, from the mandatory 5%. (Units from the 5% threshold requirement will be counted toward the total percentage for scoring in this section.) In order to score additional points, special population-eligible units must be designated for households with incomes no greater than 30% of AMI, and in one or more of the following categories:

Amenities	Distance Measured Along Existing Right of Way	
	≤ .5	≤ 1
Grocery of at least 10,000 sq. ft. and sufficient food to maintain daily food consumption	3	2
Walk-in Medical Facility/Hospital	3	2
Walk/Hike Trail	2	1
Pharmacy	2	1
Child Care (family)/Senior Center (senior)	2	1
Public School (family sites only)	2	1
Library	2	1
Park	2	1
Community, Civic, or Town Center open to public	2	1
Fixed Route Transit Stop	2	1
Bank	1	.5
Department or Clothing Store	1	.5
Hardware Store	1	.5
Post Office	1	.5
Indoor Fitness	1	.5
Community Facilities: place of worship, community garden, cultural arts, police, or fire station	1	.5
Public Airport	-3	-2
Active Landfill/Dump/Junkyard	-3	-2
Jail, Prison, or Detention Center	-2	-1
Railroad	-2	-1
Heavy Industry	-2	-1

- » Persons with HIV/AIDS-related illness;
 - » Homeless;
 - » Survivors of Domestic Violence;
 - » Persons with Disabilities;
 - » Youth exiting foster care or persons exiting state-run institutions; and
 - » Other special-needs populations identified in DSHA's Needs Assessment may be considered at DSHA's sole discretion.
- An agreement shall be in place with DSHA, the referring agency, and the owner to assure that sufficient referrals of special population-eligible households for tenancy are received. DSHA has developed a supportive-housing referral system that must be utilized by all applicants to obtain referrals of special population-eligible households, who are connected to supportive services.
 - The Declaration of Restrictive Covenants (extended use agreement) will require that the targeted units are maintained and that a corresponding number of units are marketed to and set-aside for special needs eligible households throughout the compliance period. The owner will also agree that targeted units will not be segregated within the property or in any way be distinguishable from non-targeted units (beyond the presence of accessible features or assistive technology) and targeted unit mix will depend on the needs of the referred households. Applicants shall be willing to allow for physical or safety accommodations necessary for the target populations.
 - When fully accessible target units are not occupied by special population-eligible households, a lease addendum for the non-special population-eligible household will be required for the non-special population-eligible household to transfer to the next available non-special population unit (of comparable or smaller size) when a special population-eligible household applies and is accepted to the development.
 - Target units must be reserved exclusively for the target population(s). If a project is unable to fill a unit with the targeted population after a 60 calendar-day referral period, the unit may be

leased to another household with incomes at the Target Unit's AMI or below. The next available unit in the Project at the Target Unit's AMI shall be marketed to the Project's original targeted population until the project is in compliance with the percentage for which it received points. The 60 calendar day period at lease-up will be measured from the date upon which the project achieves 80% occupancy and at turnover will be measured from the date upon which the unit is determined ready for occupancy following moveout by the prior tenants and completion of any unit turn cleaning, repairs, or maintenance.

- All applicants will complete a targeting plan, signed certification and memorandum of understanding with DSHA.

Up to 5 points for additional fully accessible units:

- 3–5 points are awarded for developments that exceed the Fair Housing minimum requirement threshold of maintaining 5% of the total unit count as fully-accessible units.

New Castle County		Kent & Sussex County	
Points	% of Fully-Accessible Unites	Points	% of Fully-Accessible Units
3	10%	5	10%
5	15%		

- Accessible units should be marketed and rented to households that need the accessible features. Applicants seeking points for additional Fully Accessible units must submit an Accessibility outreach and 50 of 76 marketing agreement describing marketing and outreach efforts to the disabilities community. The agreement may be in draft form at application, and is required to be executed as a condition to closing. The agreement must be included in Exhibit 31 and include, at minimum:
 - » Detailed description of property, including address, amenities, contact information, and unit mix;
 - » Number and description of fully accessible units in property;

- » Fully Accessible Unit Target Income and Rents;
- » Form Lease;
- » Property Management Agent signatory; and
- » Signatory of at least one disabilities service provider.
- When accessible units are not occupied by households that need the accessible features, a lease addendum for the non-disabled household will be required for the non-disabled household to transfer to the next available non-accessible unit (of comparable or smaller size) when a household that needs the accessible features applies and is accepted to the development. Fully Accessible units must not be concentrated in a given area (i.e., segregated to only one floor, building, or section of the development).

- Applicants are required to list their development and all accessible units on the following link: www.delawarehousingsearch.org.

Bonus points:

- Recognizing that the dual goals of achieving important public policies while containing costs and achieving the greatest number of affordable units for Delaware residents may compete with one another, DSHA will offer Bonus Points to those applications scoring at least 5 points in the Cost Reduction point category and at least one of the categories listed below.
- Applications meeting the threshold of 5 points in Cost Reduction or Cost Balance and scoring in any of the below Eligible-Point Pools, will receive a multiplier of 0.5 times the total points scored for a total of no more than an extra 10 bonus points (see table below).

Eligible Point Pools	
Promoting Balanced Housing Opportunities	Historic Housing
Energy Conservation Measures	Additional Fully Accessible Units
Community Design	New Creation Family Projects Serving Lower Income Residents < 40%

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these priorities:

- In September 2014, the Delaware Housing Needs Assessment 2015-2020 was released. The study, prepared by GCR Incorporated and The Reinvestment Fund (TRF) for the Delaware State Housing Authority, identifies and quantifies housing needs of existing households in Delaware and projected housing demand for 2015-2020, as well as national trends in housing policy. The full report and associated documents are available at: <http://destatehousing.com/FormsAndInformation/needs.php>.

- » An online reporting portal was also developed for the project and is available at http://demo.gis.gcr.com/Delaware_GIS/. The report evaluates needs at the submarket level, providing demand projections and demographic and housing needs analysis for 6 submarkets in the State's 3 counties.
- » Priority needs identified in the Needs Assessment and reflected in this Qualified Allocation Plan include:
 - ◇ Creation of new affordable rental housing, especially for families and especially in areas of opportunity for low-income households;

- ◇ Preservation of the State’s existing affordable housing properties, especially federally-subsidized properties and sites in poor physical condition; and
- ◇ Integrated, affordable units for people with disabilities and extremely low incomes, and other special populations that may need supportive services and rental assistance to live independently.
- Needs of people with disabilities and special populations:
 - » People with disabilities, particularly severe disabilities, are far more likely to have poverty-level income and lower income in general than people with no disabilities. In Delaware, 39% of people with disabilities have income below 200% of the federal poverty level compared to 25% of people with no disabilities. People with the most severe, work-limiting disabilities may rely on SSI or SSDI for income, which typically provides a very limited income that makes it near-impossible to afford housing without assistance. The lack of stable, affordable, and accessible housing is often a major barrier to remaining in the community for people with severe disabilities and extremely low income.
 - » In July 2011, the State of Delaware signed a Settlement Agreement with the United States Department of Justice (USDOJ) resolving a three-year investigation into the State’s behavioral health care system. The Agreement lays out strategies and benchmarks to ensure Delaware’s compliance with the Americans with Disabilities Act (ADA), specifically the “integration mandate” that services be provided in the least restrictive setting possible, as upheld by *Olmstead vs. L.C.* While the Agreement is specific to the population with Serious and Persistent Mental Illness (SPMI), the Department of Health and Social Services (DHSS) is carrying its intent and spirit into systemic reform across the Department. Ensuring affordable housing opportunities and choices are available to support community-based care is a critical piece of these reforms. For the State’s affordable housing industry, this shift to prioritizing community based care means increased focus on integrating units that are set-aside for people with disabilities in regular multifamily properties, investing resources to meet affordability needs, and coordinating with service providers.



State HFA homepage | Department of Housing and Community Development, <https://dhcd.dc.gov/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they fault to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- Up to 5 points for special populations:
 - » In alignment with the Age-Friendly DC Task Force recommendations, prioritization scoring points will be awarded for projects that include units designed and reserved for seniors (55+), including assisted living and intergenerational housing units. Maximum points will be awarded to projects that reserve at least 80% of the units for seniors (55+), and in which all senior units meet the universal design standards. Prioritization points will also be awarded to projects with at least 30% of the units meeting Type A accessibility requirements. Type A units are adaptable units that can allow seniors and others with mobility issues to age in place. Type A units must meet the requirements as defined in Chapter 11 of the 2013 District

of Columbia Building Code: <https://codes.iccsafe.org/content/chapter/9182/>.

Award points for providing certain features in properties serving older adults:

- This state does not award specific points for features in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Up to 5 points for site selection and design characteristics:

- Site selection and project design must meet the needs of the occupants with appropriate unit design and onsite amenities. Maximum points may be awarded to projects that meet the following criteria and others as specified in the Affordable Housing RFP: Site selection is desirable for the proposed project and planned use(s); the project's construction/rehabilitation scope of work is appropriate for the anticipated needs of the target population(s); and the site design, amenities, and unit design are innovative and specifically tailored for the project's target population(s).

Up to 3 points for resident services plan:

- Up to 3 prioritization scoring points are available for projects proposing high-quality, property-wide resident services. Such services are in addition to the PSH case management services that serve a limited resident population with more intensive needs. Maximum points will be awarded to projects with a resident services plan that is complete, thorough, and specifically tailored to the needs of the project and resident population.

Up to 3 points for transit proximity:

- This item awards priority scoring points to projects that are located within ½ mile of a Location Criteria DHCD 2019 Qualified Allocation Plan, Page 30 of 53 Metrorail station or DC Streetcar stops, as evidenced by using the following website: <http://arcg.is/1OchwCA>. Maximum points will be awarded to projects located within ¼ mile of a Metrorail station or a DC Streetcar stop. No points are awarded based on proximity to a bus line.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritized other types of development through these set-asides:

- 10% nonprofit set-aside; and
- Up to 25% director's special initiative set-aside:
 - » The DHCD Director may use up to 25% of any annual per capita allocation and 25% of any unallocated carryover of

a prior year allocation as a Director's Special Initiatives program for stimulating development in any targeted area including economic opportunity targeting, or other special initiatives in line with Department priorities as outlined in the Affordable Housing RFP, the Consolidated Plan, and the Annual Action Plan.

Florida | 2020 QAP



Florida Housing Finance Corporation allocates Housing Credits through a series of RFAs released every year. Unless otherwise noted, below items pertain to RFAs 2020–201, 202, 203, and 204.

State HFA homepage | Florida Housing Finance Corporation, www.floridahousing.org

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

In RFA 2020–203, Miami-Dade County, “The Corporation has a goal to fund one proposed Development that selected the Demographic Commitment of Elderly (Non-ALF) at question 2.a. of Exhibit A.”

Outside of Miami-Dade County, the state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award point for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Up to 6 points for transit proximity:

- To receive proximity points for Transit Services other than Private Transportation, provide latitude and longitude coordinates for that service, stated in decimal degrees, rounded to at least the sixth decimal place, and the distance between the Development Location point and the coordinates for the service. The distances between the Development Location Point and the latitude and longitude coordinates for each service will be the basis for awarding proximity points. For Public Bus Stop, Public Bus Rapid Transit Stop, Public Bus Transfer Stop, and Rail Stations, coordinates must represent the location where passengers may embark and disembark the bus or train.
 - a. Private Transportation (2 Points) This service is defined in Exhibit B and may be selected only if the Applicant selected the Elderly (ALF or Non-ALF) Demographic Commitment; or
 - b. Public Bus Stop (maximum 6 Points)
 - ◇ This service is defined in Exhibit B and may be selected by all Applicants.

◇ Each Public Bus Stop must meet the definition of Public Bus Stop as defined in Exhibit B. Each Public Bus Stop, except for Sister Stops, must serve at least one unique route. Up to two of the selected Public Bus Stops may be Sister Stops as defined in Exhibit B. Or

- c. Public Bus Transfer Stop (maximum 6 Points) This service is defined in Exhibit B and may be selected by all Applicants. Or
- d. Public Bus Rapid Transit Stop (maximum 6 Points) This service is defined in Exhibit B and may be selected by all Applicants. Or
- e. Public Rail Station (maximum 6 Points) This service is defined in Exhibit B and may be selected by all Applicants.

Points (4 max for each service) for community services:

- The Community Services that are available to all Demographics are Grocery Store, Medical Facility, Pharmacy, and Public School.
- Provide the location information and distances for Community Services on which to base the Application's Community Services Score. The Community Service Scoring Charts, which reflect

the methodology for calculating the points awarded based on the distances, are outlined in Exhibit C.

- The distance between the Development Location Point and each Community Service must be calculated from a point that is on the doorway threshold of an exterior entrance that provides direct public access to the building where the service is located. If there is no exterior public entrance to the Community Service, then a point should be used that is at the exterior entrance doorway threshold that is the closest walking distance to the doorway threshold of the interior public entrance to the service. For a Pharmacy located within an enclosed shopping mall structure that does not have a direct public exterior entrance, the doorway threshold of the exterior public entrance to the enclosed shopping mall that provide the shortest walking distance to the doorway threshold of the interior entrance to the Pharmacy would be used.
- Applicants may use the same location for the Grocery Store, Medical Facility and/or Pharmacy if the Grocery Store, Medical Facility and/or Pharmacy is housed at the same location.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, the state priorities other types of developments through these separate RFAs:

- RFA 2020–211: Available Housing Credit Financing for Developments Located in Small Counties with an Aged Active Award of 9% Housing Credits.
- RFA 2020–204: Housing Credit Financing for the Preservation of Existing Affordable Multifamily Housing Development.
- RFA 2020–203: Housing Credit Financing for Affordable Housing Developments Located in Miami-Dade Country.
- RFA 2020–203: Housing Credit Financing for Affordable Housing Developments Located in Broward, Duval, Hillsborough, Orange, Palm Beach, and Pinellas Counties.
- RFA 2020–201: Housing Credit Financing for Affordable Housing Developments Located in Medium and Small Counties.
- RFA 2020–103: Housing Credit and SAIL Financing to Develop Housing for Homeless Persons.



State HFA homepage | Department of Community Affairs, <https://www.dca.ga.gov/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state uses the same definition as the federal Fair Housing Act without referencing it directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Up to 3 points for providing on-site preventative health care:

- 3 points will be awarded to Applicants agreeing to provide on-site preventive health care services and education at the proposed development.
 - » Services. To be eligible for points in this category, the preventive services must be provided at least monthly and be offered for \$15 or less, preferably at no cost, to the residents. The Applicant must also provide health education. To provide services and education, the Applicant must partner with an external organization, such as a medical clinic, university, or healthcare organization or demonstrate prior experience of independently delivering preventive health care services and education to residents.
 - » Examples of eligible preventive health care services include but are not limited to:
 - ◇ Annual physical; Immunizations; Biometric screenings; Diabetes; HIV tests; STD tests; PAP smears; Mammograms; Colorectal cancer screenings; Depression screenings; and Tuberculosis (TB) screenings;

- » Outcomes: The Applicant must designate a Health Services Coordinator (HSC), from in-house staff or through an external organization. An existing resident services coordinator may serve as an HSC. The HSC will assess residents' health needs, make appropriate referrals, and track health outcomes. The outcomes tracked may include but are not limited to the following performance measurements:
 - ◇ Median number of ER visits in the last year
 - ◇ Median number of hospital admissions in the last year
 - ◇ Percent of residents who visited a doctor for routine care in the last year
 - ◇ Percent of residents who have an established personal doctor and/or report a usual place of care
 - ◇ Percent of residents enrolled in Medicare and/or Medicaid
 - ◇ Percent of residents participating in health services and activities

1 point for healthy eating initiative:

- 1 point will be awarded to Applicants agreeing to provide a healthy eating initiative at the proposed development. The initiative must include both items (1) and (2):
 1. Community garden, which must:
 - ◇ Have a minimum planting area of at least 400 square feet;
 - ◇ Utilize a nearby water source;
 - ◇ Be accessible to all residents;
 - ◇ Be surrounded on all sides with fence of weatherproof construction; and
 - ◇ Meet the additional criteria outlined in DCA's Architectural Manual — Amenities Guidebook. The Applicant must ensure that the basic organization and management of the garden is maintained.

2. Monthly healthy eating programs provided free of charge to residents. These programs may incorporate education about healthy food or access to healthy food. Examples include but are not limited to:
 - ◇ Garden maintenance;
 - ◇ Healthy food preparation;
 - ◇ Healthy eating newsletter;
 - ◇ Weight management efforts;
 - ◇ Collaborating with local food; assistance programs such as food banks and food pantries; and
 - ◇ Facilitating the use of online food delivery programs.

Up to 10 points for access to desirable activities:

- 1 point will be awarded to desirable activity/ characteristics which are within a 2- mile driving or walking distance of a proposed Rural site and 1.5-mile driving or walking distance of a proposed Flexible site.
- 2 points will be awarded to desirable activity/ characteristics which are within a 0.5-mile driving or walking distance of a proposed site.
- Driving or walking routes must originate from geo-coordinates of the pedestrian or vehicle site entrance and end at the geo-coordinates of the desirable amenity.
- Each building/entity/location will be assigned to only 1 desirable category, with the exception of an amenity under (a), (c), or (l) below, which may be assigned to up to 2 desirable categories. (Example: a public park may have a gymnasium and/or a swimming pool, or a supermarket may have a pharmacy).
- Desirable characteristics that are under construction may be eligible for points if the construction site is clearly active and the new structures are above ground at the time of Applicant Submission.
- For Scattered Site Projects, desirable amenities must be measured from the center point of each Scattered Site locations.

Category	Item	Amenity
Retail & Restaurants	a	National big box general merchandise store, typically with a minimum of 50,000 sq. ft. of floor space (e.g., Wal-Mart, Target, Costco, BJ's, Sam's Club)
	b	Retail/clothing/department store (full range of clothing/household items)
	c	Supermarkets and grocery stores with meat, dairy, and produce (high-end specialty stores and convenience stores not eligible)
	d	Restaurants
Medical Care	e	Hospital (outpatient centers or emergency care facilities not eligible)
	f	Medical care provider (e.g., clinic, physician/dental office)
	g	Pharmacy
Education & Child Care	h	Child care service licensed by Georgia Dept. of Early Care and Learning
	i	Institution that is part of the Technical College System of Georgia
	j	Elementary, middle, or high school
Community Assets	k	Traditional town square which includes an operational anchor institution (e.g., county courthouse, city hall) and which serves as a hub for both commercial activity and community events [only applicable to rural properties]).
	l	Community or recreational center (e.g., YMCA, Boys & Girls Club, public pool, public gymnasium, senior community or multipurpose facility)
Community Assets	m	Public park/public community garden
	n	Public library
	o	Fire station or police station
	p	Federally insured banking institutions (ATMs not eligible)
	q	Place of worship
	r	Post office

- Up to 6 points available for community transportation options. All Community Transportation Options must meet the following criteria:
 - » Transportation service must be publicized to the general public via website or published brochure.
 - » Transportation service must be available to all residents of the proposed development/site.
 - » Transportation route must have a local route. Routes that only run direct or express routes will not qualify.
 - » On-call transportation services are not eligible for points in the Flexible Pool.
- Up to 6 points for TOD:
 - » 5 points will be awarded to Flexible Pool Applications proposing a site owned by a public or local transit agency which has been strategically targeted by the agency to create housing with on-site or adjacent access to public transportation. The agency-owned site must rest along a transit line that follows a fixed route and fixed daily schedule available to the public every day of the week.
 - » 4 points will be awarded to Flexible Pool Applications that propose a site within 1 mile walking distance of a transit hub. DCA will define transit hub as a station that has 3 or

more bus routes, rail options, and/or other affordable mass transit options. The hub must rest along a transit line that follows a fixed route and daily schedule serving the public no less than 5 days per week.

- » 1 additional point will be awarded to Flexible Pool Applicants awarded points in A1 or A2 above that serve a Family tenancy.

— OR —

- Up to 6 points for TOD:
 - » For items B1–4 below, the service must serve the public no less than 5 days per week. For items B1- 3 below, the stop must also rest along a transit line that follows a fixed route and daily schedule. Applicants are eligible for either B1, B2, B3, or B4.
 - ◇ 3 points will be awarded to Flexible Pool Applications that propose a site within a 0.25- mile walking distance of an established public transportation stop.
 - ◇ 2 points will be awarded to Flexible Pool Applications that propose a site within a 0.5-mile walking distance of an established public transportation stop.
 - ◇ 1 point will be awarded to Flexible Pool Applications that propose a site within a 1-mile walking distance of an established public transportation stop.
 - ◇ 1 point will be awarded to Rural Pool Applications demonstrating that a publicly operated/sponsored and established transit service (including on-call or fixed-route service) will provide a reliable and available transportation option to all residents of the development. If the rural transportation option

is a fixed-route service, the stop must be within a 0.5-mile walking distance of the site. If the transportation option is on-call, the service must be available on-site.

Up to 2 points for Enterprise Community Partners Opportunity 360 (including access to health care):

- Applicants are eligible for only one of the following items:
 - » Enterprise has released a public dashboard called Opportunity 360. It analyzes how well a given census tract offers residents access to opportunity, compared to a regional, state, and national percentile.
 - » A score of 60 indicates that a census tract provides higher access than 60% of the neighborhoods in the State. Applicants may earn points for demonstrating a State percentile of 60 or greater in one or both of the following categories:
 - ◇ Health and well-being: Seven measures assessing residents' health status and ability to access care.
 - ◇ Economic security: Four measures assessing residents' ability to afford a good standard of living.
- 2 points will be awarded to Applications with a State percentile of 60 or greater in the two identified categories.
- 1 point will be awarded to Applications with a State percentile of 60 or greater in one of the identified categories.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- 10% nonprofit set-aside;
- General set-aside: 1 Application may be selected to receive up to one million dollars (\$1,000,000) of the 9% credits available for the 2020 competitive round for a strategic property that has been determined to be of high priority to the State of Georgia;
- Up to \$1.5M set-aside for Rural HOME Preservation; and
- Set-aside for up to 3 developments under disaster rebuilding set-aside.

Georgia DCA has also established the following state priorities:

- **Integrated Housing Opportunities for Persons with Disabilities:** DCA has a strong commitment to provide Integrated Housing options for Persons with Disabilities. DCA's commitment to provide a full range of housing options drives the decision to focus funding on an adequate supply of housing in an integrated setting. Characteristics of integrated housing include, but are not limited to: the project's proximity to community resources and activities; opportunities for residents with disabilities to live independently and interact with non-disabled persons; the same tenancy rights as nondisabled individuals including eviction protection, choice of roommates, and choice of service providers; and the absence of restrictive, regimented rules that limit residence activities or impede residents' ability to interact with non-disabled individuals. (DCA uses the definition of integration provided by the Justice Department in its Statement on Enforcement of the Olmstead Integration Mandate in its analysis of whether a project provides Integrated or congregate housing for Persons with Disabilities.)
- **Health Outcomes for Residents:** Physical and mental health are necessities for thriving individuals and families. The location where a household lives strongly influences household health through components like access to quality care, education, and healthy foods. In addition, safe, quality affordable housing provides the foundation and central location for encouraging healthy lifestyles. As such, DCA has a strong commitment to encouraging better health outcomes for residents through site selection, site design, community partnerships, and focused services. (2020 Qualified Allocation Plan – Core Page 11.)
- **Preservation of Existing Affordable Housing:** Preservation is a key component of DCA's work to ensure an adequate supply of affordable rental housing, advance sustainability, and retain historic structures through adaptive reuse. Most importantly, preservation is a vital tool for maintaining affordability through the retention of federal rental assistance. In addition, preservation allows DCA to mitigate the risk of losing affordable housing projects due to market conversion, physical deterioration, or financial instability. Regarding sustainability, renovating existing buildings produces less construction waste, uses fewer new materials, and requires less energy than new construction. Further, little to no new utility or transportation infrastructure investments are required when existing buildings are rehabbed. Combined with energy efficient upgrades, rehabbing and preserving both aging rental and historic buildings is a conservative, cost effective way to meet growing demand for quality affordable housing. Additionally, historic preservation advances DCA's stewardship of historic buildings and locations while maintaining cultural and community diversity. Finally, DCA seeks to utilize its 4% Bond Allocation to the maximum extent possible for preservation of affordable housing.
- **Quality Developments:** DCA's multifamily programs are designed to create financially and physically sustainable affordable properties. Two

major components that support the development of quality affordable housing properties are quality project teams and quality buildings. The development quality created in part through these key components directly supports the long-term viability of the project and its ability to serve its residents. Selected projects should have strong Project Teams with significant capacity, a solid track record of partnership, and a history of success developing the type of affordable housing proposed. Selected projects should achieve a level of quality in architecture, design, and sustainable building methods that lay the foundation for the long-term success of the development.

- Innovation: Resources for affordable housing have been significantly reduced while the need for housing Georgia’s residents including seniors, persons with special needs, re-entering citizens, Persons with Disabilities, and persons with low incomes has increased. DCA encourages projects which are innovative and seek to provide housing and services in a more efficient, sustainable, and cost-effective manner. Innovative collaborations, placed-based strategies, cost-effective delivery of services, and new building techniques can be an important part of broader or comprehensive neighborhood improvement. Innovations can also work to mitigate barriers for individuals that face difficulties in obtaining safe, quality affordable housing, such as re-entering citizens who may need more individualized resident screen criteria. These strategies have the capability to fundamentally change the character of a neighborhood through measurable community impact.
- Geographic Distribution of Resources: Georgia is a diverse state with both rural, suburban, and urban communities. The consideration of Rural areas shall be included in ensuring a balanced allocation of resources. Selection of lower scoring projects may be required to obtain a better geographic allocation.
- Housing opportunities for persons with disabilities (not a direct incentive):
 - » DCA is committed to providing a full range of housing options for Persons with Disabilities. DCA identifies both Integrated and congregate housing as important healthy living options for Persons with Disabilities and seeks to allow Persons with Disabilities to choose what type of housing they prefer. Historically, a majority of the Georgia housing credit resources financing supportive housing have supported congregate housing development. Therefore, DCA’s commitment to providing a full range of housing options requires focusing resources to develop supportive housing in an Integrated Setting. Therefore, DCA will not fund new construction of congregate housing under this QAP. DCA uses the definition of integration provided by the Justice Department in its Statement on Enforcement of the Olmstead Integration Mandate in its analysis of whether a development provides Integrated or congregate housing for Persons with Disabilities.
 - » In order to ensure that supportive housing developments meet DCA’s goals, DCA will review each proposed Application as a whole to determine whether the project is “Integrated” or “congregate”. Applicants considering submitting an Application for a project that serves Persons with Disabilities should specifically discuss how the project meets the definition of integration in terms of its proximity to community resources and the opportunity for residents with disabilities to interact with non-disabled persons, which is referenced in the DCA definition of Integrated Housing. (DCA’s definition is based upon the definition used by the Justice Department in its Integration mandate.)



State HFA homepage | Hawaii Housing Finance & Development Corporation,
<https://dbedt.hawaii.gov/hhfdc/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing affordable senior housing:

- Up to 2 points for Project serving tenants with special housing needs.
 - » For the purpose of this Qualified Allocation Plan, “special housing needs” mean persons for whom social problems, age or physical or mental disabilities impair their ability to live independently, and for whom such ability can be improved by more suitable housing conditions.
 - » Persons with special housing needs may include persons with physical or mental disabilities or persons who are homeless. Projects may receive up to 2 points for the criterion if it commits to provide services that will enhance the livability of the project for tenant populations with special housing needs. The amount of points awarded is

based on the quantity and quality of services provided and the status of commitment. The maximum 2 points will be awarded only to applicants that have an executed commitment to serve this project by a third party service provider or if applicant or owner is an experienced provider of the proposed services.

- » All such services shall be optional to the tenant and shall be provided at no additional cost to the tenant.
- » Projects must substantiate the feasibility of providing these services throughout the compliance period as part of its application. The owner shall certify the feasibility of the services provided in the application accompanied by supporting documentation during the compliance period.
- » Market Study must include an analysis of market demand for tenants with special housing needs.
- » Projects that commit to provide housing for tenants populations with special housing needs will be required to have those units occupied by the special housing needs tenants. The Declaration of Restrictive Covenants for Low Income Housing Credits will restrict the occupancy of the units to the special housing needs tenants for the duration of the committed affordability period. For example, if a projects commits

10 of the 60 Housing Credit units for special housing needs tenants, those units shall be occupied at all times by a special housing needs tenant. The unit shall remain vacant until a special housing needs tenant occupies the unit regardless of whether there is a waitlist for the project for the other remaining units.

Award points for certain features in properties serving older adults:

- As described above, Persons with special housing needs may include persons with physical or mental disabilities or persons who are homeless. Projects may receive up to 2 points for the criterion if it commits to provide services that will enhance the livability of the project for tenant populations with special housing needs. The amount of points awarded is based on the quantity and quality of services provided and the status of commitment. The maximum 2 points will be awarded only to applicants that have an executed commitment to serve this project by a third party service provider or if applicant or owner is an experienced provider of the proposed services.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Up to 6 points for project location, including medical facilities.

- The points awarded will be based on HHFDC's evaluation of factors such as, but not limited to:
 - » Project is located in a county's urban core/district (preference) versus rural district and is accessible to employment opportunities and shopping; and recreational, medical and educational facilities are located in the immediate vicinity of the project site (see table below).

Eligible Points	
Located in a County's urban core	4 points
Located in an urbanized area	3 points
Located in a rural district in proximity to employment opportunities and medical and educational facilities	1 point
Project may earn two additional points for availability of a mass transit stop/station within ½ mile. For Oahu, the term "mass transit" is exclusive to rail. For the neighbor islands, the term "mass transit" is not exclusive to rail.	2 points



State HFA homepage | Idaho Housing and Finance Association, <https://www.idahohousing.com/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- 3 points for Developments that provide housing for older persons as defined in the Fair Housing Act.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Up to 5 points for Developments located within the stated distances from goods, services (including medical facility and pharmacy), or major employer:

- ½ point per category for a maximum of 5 points.
- Good and Services — located within 1.5 miles driving distance in urban communities or 3 miles driving distance in rural communities.
- Major Employer — located within 5 miles driving distance in urban communities or 10 miles driving distance in rural communities.
- Urban Communities — communities that do not qualify as eligible communities for USDA RD programs.
- Rural Communities — communities that qualify as eligible communities for USDA RD Multifamily Housing programs.
 - » Full service Grocery Store (does not include convenience stores);
 - » Retail Shopping (i.e., hardware, clothing store, etc.);
 - » Police or Fire Station;
 - » Pharmacy;
 - » Post Office;
 - » Bank/Credit Union;
 - » Public Park;
 - » Education Facility (includes K-12 schools,

- university, adult education, vocational school, community college);
- » Public Library;
- » Health Club or Recreational Center (i.e., YMCA, etc.);
- » Hospital or Medical Clinic, Medical or Dental Office;
- » Social Services Center (i.e., Senior Citizen Center or Community Center) or Licensed Childcare Facility;
- » Bus stop, transit stop (i.e., Park & Ride, etc.);
- » Public greenbelt bike/walking path access (does not include city sidewalks or street bike lanes); and
- » Major Employer (as documented in the Market Study or Appraisal).

Up to 5 points for specific amenities, including computer rooms:

- 1 point for hard surfacing on 100% of area flooring in each residential unit; bedrooms are exempt from this rule.
- ½ point for central Air Conditioning or Ductless Air Conditioning in each residential unit.

- ½ point for High-Speed Internet or Cable/Satellite Hookup availability for each residential unit.
- ½ point for on-site storage for each residential unit.
- ½ point for computer/study room with high speed internet access with at least one computer for every 15 residential units.
- 2 points for fiber cement exterior siding or comparable exterior elements on 100% of the exterior with minimum 30-year warranty.
- 1 point for exterior security camera surveillance system with closed circuit.
- 1 point for electronic access door controls for interior common areas.
- 2 points for personal outdoor living spaces (i.e., attached patios, decks, etc) for each residential unit in the development.

1 points for Developments which give a waitlist preference to persons with HUDVeterans Affairs Supportive Housing (“VASH”).

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- 10% nonprofit set-aside (\$503,000);
- 10% preservation set-aside (\$503,000);
- 15% Rural set-aside (\$754,000);
- Remainder, non-targeted distribution (\$3,420,000); and
- Up to 15% may be set-aside for special needs housing, as to be determined.

Illinois | 2020–2021 QAP



State HFA homepage | Illinois Housing Development Authority, <https://www.ihda.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state uses the same definition as the federal Fair Housing Act without referencing it directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- When awarding points for unit mix, IHDA differentiates between restricted units reserved for the elderly and others:

Elderly Restricted Units	
Two-bedroom units as a % of elderly restricted units	
1% – 9.9%	1 point
10% – 25%	2 points

Non-Elderly Units	
Three-bedroom and larger units as a % of total units	
25% – 49.9%	1 point
50% or more	2 points

- For Projects serving both Elderly and non-Elderly populations, points are not cumulative and are limited to the lowest score by population.

Award points for certain features in properties serving older adults:

- This state does not award specific points for providing affordable senior housing.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Up to 3 points for access to transportation:

- 1 point for Transit Oriented Development
 - All sites are located within a completed, in-process, or programmed RTA-Transit Oriented Development site (TOD).
 - OR —
 - For sites that are located outside of the RTA — Transit Oriented Development Program of Northeastern Illinois, a local Transit Oriented Development plan which clearly includes additional housing as an initiative of the plan and is located within ½ mile of a major transportation hub may be submitted.

- 1 point for Mass Transit or Demand Responsive Transit (DRT):
 - » All sites are located within 0.25 miles of a fixed route transit stop defined as buses and trains serving local destinations beginning no later than 8am and ending no earlier than 6pm, Monday through Friday.
 - OR —
 - » All sites are served by a DRT service Monday through Friday. DRT must be available to the public at large; that is, it may not be restricted to service for the elderly or disabled.
- 1 point for Travel Time to Work:
 - » Site(s) is located within a census tract that exhibits less than or equal to average commute time to work. Commute time thresholds are determined by the set-aside in which the site(s) is located and are set at the average travel time of all tracts existing within the set-aside.

Up to 9 points for neighborhood assets:

- Projects with sites that have desirable neighborhood characteristics and amenities can score up to 9 points, depending on the proximity of neighborhood assets to the project, as defined by the following zones below.

Distance in Miles by Zone			
	A	B	C
Chicago	0.25	0.5	0.75
Chicago Metro	0.5	1	1.5
Other Metro	1	2	3
Non-Metro	2	4	6

Points by Type of Asset and by Zone			
	A	B	C
Education/Job Training	3	2	1
Health Services	3	2	1
Recreation	3	2	1

- » Only one establishment will count for each row. For example, a community college and a job training center are each Education/Job Training establishments. The applicant may only take points for the one that is closest. An application may accumulate points for more than one category, based on the distance of each asset from the project. For example, a Project that is located in a Non-Metro area, and is within 2 miles of a Job Training Center (3 points) and within 6 miles of a Health Services establishment (1 point), will score a total of 4 points.
- » For the health services category:
 - ◇ All sites are located within the proximity zone of a county health clinic, urgent care clinic, federally qualified health center, or hospital system.
- » For the Civic/Recreation category:
 - ◇ All sites are located within the proximity zone of a public library, public park/ park district territory that is open to the public.
- » For Elderly applications to earn points in the education category:
 - ◇ All sites are located within the proximity radius of a community college or continuing education facility offering a full set of classes.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

Set-Aside	Allocation Goal
City of Chicago	12%
Chicago Metro	37%
Other Metro	15%
Non-Metro	20%
Statewide	16%
Authority Allocated Per-Capita 9% Tax Credits	100%

IHDA has also outlined the following priorities:

- Access to Food is of the utmost importance to The Authority. To help ensure that Food Access is evaluated in a fair way, each project will receive a food access evaluation as part of its PPA review. As part of this review, the Authority will determine if the project is in an area of low access to food via the USDA Food Access database published here: <https://www.ers.usda.gov/data-products/food-access-research-atlas/>.
- » Access to food will be determined within the following set-aside proximity radii:
 - ◇ City of Chicago — 0.5 miles.
 - ◇ Chicago Metro — 1 mile.
 - ◇ Other Metro — 10 mile.
 - ◇ Non-Metro — 10 mile.
- » PPA Approvals on projects in areas of low food access will be conditional as these projects will subsequently be required to provide additional documentation that the project is within close and easily traversed proximity to a supermarket, supercenter, or large grocery store OR that a Community Revitalization plan exists that accounts for food access.

Indiana | 2020–2021 QAP



State HFA homepage | Indiana Housing and Community Development Authority
<https://www.in.gov/ihcda/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain feature in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Up to 6 points for development amenities:

- IHEDA will award up to a total of 6 points for selecting development amenities from the charts below:
 - » 2 points for 10 or more amenities in Chart 1, with a minimum of two amenities required in each of the three sub-categories; and
 - » 2 points for five or more amenities in Chart 2, with a minimum of two amenities required in each of the two sub-categories; and
 - » 2 points for three or more amenities in Chart 3, with a minimum of one amenity required in each of the two sub-categories.
- All amenities elected by the Applicant should conform to the needs of the Development and its residents. Design Amenities will be viewed as interchangeable within a column, provided the total number of design amenities selected in each column remains the same and the minimum number of amenities required for each subcategory in each column is met.

Chart 1: Common Area (Total of 10 Amenities)

A Tenant Entertainment (Minimum of 2 Amenities)	B Common Area Convenience (Minimum of 2 Amenities)	C Common Area Architectural (Minimum of 2 Amenities)
<ul style="list-style-type: none"> • Playground • Bike racks or bike storage lockers • Designated garden area • Fenced dog walking area • Community room • Community TV • Designated walking/jogging path • Billiards table • Basketball court • Fenced in tennis court • Gazebo • Picnic area with permanent grill • Sand volley ball court • Computer center • Exercise room • Theater room 	<ul style="list-style-type: none"> • One parking spot per unit • Designated car wash facility • Garage • Carport • Enclosed bus stop shelter • Comfort conditioned common areas • Daycare center • Beauty salon/barber shop • Laundry facilities • Manager on-site • On-site recycling service 	<ul style="list-style-type: none"> • Multiple building designs • Multiple floor plans • Steel frame • Architectural roofing shingles • 100% brick, stone, or cement board exterior • Metal roof covering • Slate roof covering • Sound-proof unit separation assemblies

Up to 5 points for accessible for adaptable units:

- IHEDA encourages the adoption of additional accessible or adaptable units. Applicants achieving greater than minimum threshold requirements (5% of total units in rehabilitation/adaptive reuse projects or 6% of total units in new construction projects) shall be eligible to receive for additional points. For purposes of this scoring category, the terms “accessible” and “adaptable” are defined as follows:
 - » An accessible unit must be constructed as a “Type A” unit as defined in the International

Code Council’s Accessible and Usable Buildings and Facilities Standard (ICC A117.1-2009 Section 1002).

- » An adaptable unit must be constructed as a “Type B” unit as defined in the International Code Council’s Accessible and Usable Buildings and Facilities Standard (ICC A117.1-2009 Section 1003). The allocation of such application points will be designated as follows in the table below.

Accessible/Adaptable Unit Point Designation	1 Point	2 Points	3 Points	5 Points
Family Developments				
Rehabilitation/Adaptive Reuse	5% – 6.9%	7% – 7.9%	8% – 8.9%	9% or greater
New Construction	7% – 7.9%	8% – 8.9%	9% – 9.9%	10% or greater
Age-Restricted Developments				
Rehabilitation/Adaptive Reuse (without existing elevator)	7% – 7.9%	8% – 8.9%	9% – 9.9%	10% or greater
New Construction or Rehabilitation/Adaptive Reuse (with existing elevator)				100%

- » Applicants proposing Developments of 16 units or less must implement at least 2 accessible or adaptable units to be eligible for points.

Up to 3 points for location efficient projects:

- Up to 3 points will be awarded to projects that are located within a ½ mile radius of at least three facilities from the list below (from

a minimum of two categories) or within a one mile radius of at least five facilities from the list below (from a minimum of two categories). One of the facilities must be a store with fresh produce, such as a supermarket or grocery store to qualify for the maximum points in this category. Developments without access to fresh produce may receive partial points.

Civic or Community Facilities	Services	Retail	Healthcare
<ul style="list-style-type: none"> • Licensed childcare • Community or recreation center • Entertainment venue • Education facility (including K-12, university, adult education, vocational school or community college) • Cultural arts facility (museum, performing arts theater, etc.) • Police or Fire Station • Public library • Public park • Post office • Government office that serves public onsite • Social services center 	<ul style="list-style-type: none"> • Bank • Restaurant, cafe, diner • Laundry or dry cleaner • Gym, health club, exercise studio • Licensed adult or senior care 	<ul style="list-style-type: none"> • Supermarket • Other food stores with fresh produce (as defined above) • Clothing retail • Other retail 	<ul style="list-style-type: none"> • Pharmacy • Doctor’s or nurse practitioner’s office • Optometrist • Dentist • Physical therapy office • Clinic • Hospital

Up to 2 points for TOD:

- IHEDA will award 2 points if a Development is located within a ½ mile radius of fixed transit infrastructure.
 - » “Fixed transit infrastructure” is defined as light rail station, commuter rail stations, ferry terminals, bus rapid transit stations, streetcar stops, bus stops or major bus transit centers.
 - » If the fixed transit infrastructure does not yet exist, the transit investment must be planned, approved and funded at the time of application. Transit investments that have been funded but not completed will be considered. Verification must be provided.

- » Rural and small city sites may qualify for this category if applicants can show documentation of an established point-to-point transit service that provides pick up service to within a ¼ mile radius of the site.

Up to 6 points for a tenants investment plan:

- Points in this category will be awarded based on the overall Tenant Investment Plan in regards to each level listed. Programs must have a combination of Level 1, 2 and 3 to be eligible to receive the maximum of 6 points.
 - a. Level 1 (services within this level are 0.25 points each) — This level provides goods or services as a tenant incentive and awareness

of programs and assistance offered in the community. Applicants are encouraged to network with local businesses and/or service agencies to offer unique but valuable incentives to current and/or future tenants.

- » Level 2 (services within this level are 0.5 points each) — This category may target services for more specific tenant needs such as education, classes or services that will help tenants live a more self-sufficient and healthy

lifestyle. This level requires ongoing tenant participation and/or program management.

- » Level 3 (services within this level are 1 point each) — This category offers extensive services to provide tenants with assistance, programs and tools to maintain and/or improve their lifestyle within the community. This category requires both extensive tenant participation as well as management maintenance.

Tenant Investment Plan Commitments		
Level One Services (0.25 points per service)	Level Two Services (0.5 points per service)	Level Three Services (1 point per service)
<ul style="list-style-type: none"> • Food pantry referral • Clothing pantry referral • 2-1-1 / information and referral • Smoking cessation • Discount program • Coupons to local public/private facilities • Blood pressure screening • Music ministry • Writer's group • Stress management • Quarterly resident meetings • Holiday events • Recycling program • Resident liaison • Resident's association • Mentor program • Monthly development newsletter • Virtual bowling/gold league • Monthly activities program • Neighborhood watch program • Neighborhood stabilization program 	<ul style="list-style-type: none"> • Financial literacy • Computer training • Credit counseling • Nutrition classes • Exercise classes • Resume building • GED/Adult education • Art classes • Food cultivation or preparation • Sports league • Tax preparation assistance • Medicaid waivers • Animal therapy • Employment services • Meals on Wheels • HIV counseling, testing, and education • Family caregiver support program • Symptom management 	<ul style="list-style-type: none"> • Transportation • Parenting classes/early childhood development • Light housekeeping • Outpatient rehab • Physical therapy • Medication delivery • Home healthcare • Dental services • Assisted living • Alzheimer's care • Vocational rehab services • Adult daycare/eldercare • Substance abuse treatment • Case manager • TIP coordinator • Utility assistance

OTHER PRIORITIES

This state prioritized other types of development through these set-asides:

- 10% qualified nonprofit;
- 10% stellar community design;
- 10% community integration;
- 10% large city;
- 10% small city;
- 10% rural;
- 10% preservation;
- 10% workforce housing;
- 10% housing first; and
- 10% general.

Iowa | 2020–2021 QAP



State HFA homepage | Iowa Finance Authority, <https://www.iowafinance.com/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

The state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- For senior projects only, 4 points are available for projects that include a community room (must be 20 square feet per unit up to the first 40 units).

- Up to 14 points for meeting Olmstead Goals:
 - » Projects advancing the goals of Iowa Department of Human Services Olmstead Plan for Mental Health and Disability Services to build a consumer- and family-driven system that expands people’s choices about the supports and services they need and where they are provided, in other words, a system that operates the way the U.S. Supreme Court says it should in its’ landmark Olmstead decision, where people with disabilities, of any age, receive supports in the most integrated setting consistent with their needs. All rooms and floors within a multi-level Accessible Unit shall be accessible. Accessible Units shall be dispersed throughout the Project and in different bedroom sizes rather than segregated. The applicant may select from the following options in the table below.

Fully Accessible Units (required for all) See Part C–G2	Units with Accessible Communications Features (required for all) See Part C – G2	Additional Accessible Type A Units (optional for scoring)	Scoring
10%	2%	5%	4 points
10%	2%	10%	6 points
10%	2%	15%	8 points
Senior Projects Only			
10%	2%	20%	12 points
10%	2%	25%	14 points

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

This state does not provide points for on- or off-site amenities that may be beneficial to populations of older adults.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- 10% nonprofit set-aside;
- 1 project: supportive housing for families set-aside;
- 1 project: disaster recovery set-aside; and
- 1 project: rural set-aside.



State HFA homepage | Kansas Housing Resource Corporation, <https://kshousingcorp.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- 20 points for developments that provide 100% of units targeted to tenants 55 years and older and/or to tenants with special needs.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

This state does not provide points for on- or off-site amenities that may be beneficial to populations of older adults.

OTHER PRIORITIES

This state prioritizes other types of developments by identifying the following housing needs as priorities for the Housing Credit program:

- Any development in a community with less than 10,000 population.
- Preservation of housing with a HUD Section 8 or USDA Housing Assistance Payment contract, or any application from or for a Public Housing Authority.
- Any development for special need populations including, but not limited to veterans, homeless families and individuals or persons with disabilities.
- Any development that offers gross rent for all units up to the 60% limits at a rate that is below the fair market rent for the area in which the property is located. (See Exhibit N for Fair Market Rents.)
- A second or later phase of a property where there is a current and updated waiting list equal to or greater than the number of units being proposed in the application, or there is other strong market data that will support the number of proposed units.



State HFA homepage | Kentucky Housing Corporation, <http://www.kyhousing.org/Pages/default.aspx>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- Senior Population trends: For new supply only, Senior properties located in the following counties will receive 7 points:
 - » Ballard, Boyd, Boyle, Breckinridge, Caldwell, Carlisle, Casey, Clinton, Crittendon, Cumberland, Edmonson, Elliott, Fulton, Green, Greenup, Hickman, Lee, Letcher, Livingston, Lyon, Marshall, McCracken, McLean, Menifee, Mercer, Monroe, Muhlenberg, Owsley, Pulaski, Robertson, Russell, Trigg, Wayne, and Wolfe counties.

Award points for certain features in properties serving older adults:

- Up to 7 points for senior projects (new supply only) with aging in place design (if the project is eligible for Senior Population Trends points, above).

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Projects located in areas not eligible for Senior Population Trends points which provide a minimum of 5 design features that will enhance/promote aging in place will receive 7 points. In addition to providing Fair Housing, Building Code, or UFAS required accessible dwellings, to receive points for this item, the applicant must provide five of the following features in the design of all other dwelling units. Design features selected from this list must be shown in the final plans and specifications submitted at technical submission stage, otherwise the project is subject to re-scoring and possible recapture of any KHC's resources awarded. Mark each design feature pledged with an "X" in the designated space below.

1. Lever hardware on inside and outside of all doors (including interior).	
2. One 30-inch-wide workspace kitchen counter, no more than 34 inches from the floor, located anywhere in the kitchen counter scheme. This 34-inch-high counter section must have removable cabinetry or, a cabinet with retractable doors, no center stile, and removable floor allowing for forward roll-under wheelchair access. The floor finish under this section must be complete prior to installation of cabinetry. Clear space for a wheelchair side/parallel approach centered on the work surface must also be provided.	
3. All kitchen and vanity cabinets provided with lever-shaped handles or standard U-shaped pulls, on all drawers and cabinet doors. Bathroom medicine cabinets, above a sink, are not included.	
4. Either (a) A 30-inch-wide combination range/oven appliance with front controls. The range must be flush with the countertop so items being pulled off the range can smoothly transition to the countertop. Clear space for a wheelchair side/parallel approach centered on the range must also be provided. — OR — (b) A 30-inch-wide wall oven with clear space for a wheelchair side/parallel approach and a separate 30-inch-wide, front controlled, in-counter cooktop. The cooktop must be able to be used by a person in a forward seated position. A 30-inch-wide by 27-inch-high knee space with finished interior cabinet faces and protection from hot surfaces must be provided. The base cabinet under the cooktop must have a removable cabinet or a cabinet with retractable doors, no center stile, and removable floor. The floor and wall under this section must be finished prior to installation of cabinetry.	
5. A minimum clear floor space of 56" by 60" provided at every toilet with blocking in walls for future, parallel and perpendicular, grab bar mounting.	
6. Bathroom lavatory with removable base cabinet, pedestal style sink, or wall hung sink that accommodates a forward seated position from a wheelchair. The floor and wall under removable cabinetry must be finished prior to installation of cabinetry. Protection from hot and abrasive hazards is required for all lavatories, sinks, and under removable cabinetry.	
7. All flooring extends wall-to-wall so that it runs under the cabinets and appliances.	

Up to 3 points for veterans housing preference: The applicant has provided a written commitment to give priority to U.S. military veteran applicants in their tenant selection plan. The plan must specify what documentation is required to verify the applicant is a veteran. (Refer to KHC’s Multifamily Guidelines for the definition of veteran).

For applications proposing new supply, up to 5 points for properties serving persons with disabilities:

- A minimum of 10% of the project’s units will be targeted for persons with disabilities and will be fully accessible. This does not include the required visual/hearing impaired units.

Up to 5 points for access to healthcare (new supply only):

- Access to health care services include ONLY the following facilities: general health care practitioner’s office or walk-in clinic (not specialists), or hospital. Distance is measured in radius and must be recognized in the market study. Access to one facility will be eligible for 5 points. Applicant must identify applicable page(s) in market study.

Urban Sites	List facility within 3 miles of project site		0
Rural Sites	List facility within 20 miles or project site		0

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- 9% nonprofit supportive housing.
- 35% preservation/existing supply (38% urban preservation, 62% rural preservation).
- 42% new construction/new supply (64% urban new construction, 36% rural new construction).
- 0.5% maximizing outcomes.
- 14% innovation.
- \$.12M for Beecher Terrace.



State HFA homepage | Louisiana Housing Corporation, <https://www.lhc.la.gov/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides a definition with alternate requirements to those within the Fair Housing Act:

- **Elderly Household:** A household composed of Elderly Persons; provided that a non-Elderly Person may reside in the household only if such household qualifies pursuant to the Fair Housing Act.
- **Elderly Housing Project:** A project included under the Fair Housing Act determined to be Elderly Housing.
- **Elderly Person:** A person who is 62 years of age or more at the time of initial occupancy.
- **Frail Elderly:** An elderly person with at least one impairment in Activities of Daily Living and/or multiple impairments in instrumental Activities of Daily Living as determined by DSS/DHH or the DHH/DSS.
- **Near Elderly Person:** A person who is between the ages 55–62 at the time of initial occupancy.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- 6 points for elderly households — 100% of the project units are designed for elderly households.

- » **Units for Elderly Residents:** All units for elderly residents shall be located at the grade level or on an elevator accessible floor.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

If not claiming points as a 100% senior property, 4–6 points are available for serving special needs populations. Projects with 30% such households earn 6 points, projects with 20% earn 5 points, projects with 10% earn 4 points.

- Homeless households;
- Disabled households;
- Single parent households; and
- Veterans.

Points for additional accessible units (one selection allowed):

- Accessible units in excess of S502 of II C Acces3. S504 applies to all projects, i.e., 5% of units

must be accessible for people with mobility impairments and 2% for people with hearing or vision impairments.

- » 2 points: Number of Units = more than 10% of the total units but less than or equal to 20% of the total units.
- » 3 points: Number of Units = more than 20% of the total units.

Up to 10 points for proximity to services:

- Points will be awarded for the following services located within the specified distance of the site. Applicant should ensure that the service is suitable for the targeted population. Points will only be awarded for the services listed below. 1 point will be awarded for services listed that are within a 1 mile radius of the project. ½ point will be awarded for any service listed that is located over 1 mile but is within a 2 mile radius of the development (5 miles for rural). The addresses for each selection must be included in the application submission. Evidence may be submitted but points will be assigned by the Market Analyst.
 - » Grocery store;
 - » Fresh provide market or fruit stand;
 - » Public library;
 - » Hospital/doctor office or clinic;
 - » Bank/credit union (must have live tellers);
 - » Elementary, secondary, or post secondary school;

◇ 4-year college, university, vocational, technical & community college.

- » Pharmacy/drug store;
- » Public transportation (shuttle service excluded);
- » Louisiana Licensed (current) Adult/Child Day Care/After School Care;
- » Recreational facility, youth center, senior center or club comparable community center;
- » Public park;
- » Police and fire station;
- » Laundry or dry cleaner; and
- » Gym or health club.

Points for project amenities (all amenities must be located on the project site and must be new or an improvement):

- Playground;
- Basketball court;
- Computer center one computer for every 10 units in the project;
- Exercise room;
- Picnic area with permanent grill;
- Paved walking trail (minimum ¼ mile);
- Covered parking; and
- Community garden.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these 3 funding pools:

- \$1,929,230: Qualified Non-Profit/CHDO.
- \$5,466,154: Rehabilitation General Pool.
 - » 25% of this pool set-aside for projects located in rural areas.
- \$5,466,154: New Construction General Pool.
 - » 25% of this pool set-aside for projects located in rural areas.

Maine | 2020 QAP



State HFA homepage | MaineHousing, <https://www.mainehousing.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- Up to 8 points for housing projects for Older Adults located in the following Service Center Communities (see table below).

Housing Projects for Older Adults			
Service Center Community			Points
Auburn Augusta Bangor Bath Biddeford Brunswick	Falmouth Freeport Kittery Lewiston Portland Old Orchard Beach	Saco Sanford Scarborough South Portland Waterville Westbrook	8
Brewer Bridgton Camden Caribou Ellsworth	Kennebunk Maadawaska Presque Isle Rockland Rumford	Skowhegan Topsham Van Buren Windham	6
Bar Harbor Belfast Bethel Blue Hill Damariscotta Dexter Farmington	Gardiner Hermon Houlton Lincoln Mexico Millinocket Mount Desert	Norway Oxford Pittsfield Rangeley Rockport Wiscasset	4

Award points for certain features in properties serving older adults:

- Up to 12 points for accessibility.
 - » 1 point for each unit that:
 - ◇ Exceeds the minimum number of such units required by applicable federal and state accessibility laws; and
 - ◇ Meets the requirements for a Type A unit under ANSI Standard A117.1-2009, up to the maximum points by project type below.

Type of Project	Maximum Points
Projects for Older Adults	12
Other Projects	6

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Resident Service Coordination. The Applicant must make a resident service coordinator available to the tenants on-site a minimum of 1 hour per week for every 5 Credit Units over an appropriate number of days each week acceptable to MaineHousing. The coordinator shall meet with tenants in a private and confidential manner to evaluate individual needs and make appropriate referrals. The services provided must be free of charge to the tenants. The Applicant must maintain adequate funding throughout the Compliance Period.

3 points for serving populations with special needs: The Project gives an occupancy preference for at least 20%, but not less than 4 of the units, to persons who are homeless or displaced, have disabilities, are victims of domestic violence, or have other special housing needs. The Applicant must commit to maintain a waiting list for the specific population(s) that qualify for the preference or the set-aside, and must make appropriate, voluntary services available

through a qualified third-party provider other than the resident service coordinator required under Section 5.L.

Up to 15 points for smart growth:

- 5 points: Access to Public Transportation. The Project is located within Safe Walking Distance (½ mile or less) of a designated pick-up location for existing Fixed-route Public Transportation.
- 5 points: Demand Response Transportation. Demand Response Transportation is available to all tenants with no eligibility criteria that would limit or deny service.
- 3–5 points: Proximity to Activities Important to Daily Living. The Project is located within a Safe Walking Distance of not more than ½ mile of at least 3 Activities Important to Daily Living (3 points.). Add an additional 2 points for including at least one commonly used health care service (i.e., pharmacy, urgent care, primary care, hospital, optometrist, etc.).
 - » “Activities Important to Daily Living” means activities or destinations that are important to course of daily living of the population served by the Project, which include a grocery store, a public school only if the Project is housing for families, a daycare only if the Project is housing for families, a senior center only if the Project is Older Adult Housing, a pharmacy, a bank or credit union, a post office, a retail store, a general health care practitioner’s office, a public library, a hospital and other activities or destinations approved by MaineHousing. Convenience stores, gas stations, restaurants and other food service establishments are not eligible destinations for purposes of this subsection. If there is more than one activity or destination important to the course of daily living within a single establishment, each activity or destination will be counted separately (e.g., a retail store that also includes a pharmacy and a bank branch will be treated as 3 destinations important to the course of daily living).

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- 10% nonprofit set-aside; and
- \$300,000 (one project) preservation set-aside.
 - » At least 25% of units in RD program.
 - » At least 25% of units converted to S8 under RAD.

Maryland | 2020 QAP



State HFA homepage | Department of Housing and Community Development,
<https://dhcd.maryland.gov/pages/default.aspx>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides a definition with alternate requirements to those within the Fair Housing Act:

- DHCD defines Elderly Housing as any project that proposes to restrict occupancy to one or more of the units in the project based on age. DHCD defines an Elderly Household as one in which at least one household member is age 62 or over.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Points for providing housing for older adults:

- State bonus points: DHCD may award State Bonus Points to ensure that the award of competitive resources is balanced and in the State's best interest. Bonus points may be awarded to projects to ensure that the overall award of competitive Housing Credit and RHFP funds:
 - » Promotes the development of elderly housing projects.

Points for certain features in properties serving older adults:

- This state does not award specific points for features in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Up to 8 points for transit oriented development (near metro or bus lines).

Tenant Services: While all projects must provide or coordinate resident access to community services as outlined in the Threshold Criteria, DHCD recognizes the value that more robust resident services coordination and/or direct services bring to tenants' lives.

- Up to 8 points will be awarded to projects that augment the minimum Threshold Criteria by identifying one or more tenant service providers for services on-site or in the community. The provision of such services must be evidenced by a certification from the applicant detailing the services to be provided. Points will be awarded as follows:

- » 3 points for identification of partners, including written agreement(s). The documents (in the form of an MOU or Contract) must detail where the services are located and address transportation needs for off-site services.
 - » 1 point for identification of tenant population and applicability of services offered. Services must benefit and be accessible to all tenants.
 - » Up to 2 points for description of how tenant services will be funded:
 - ◇ 2 points for full budget with sources;
 - ◇ 1 point for description of financing needed without identified sources; or
 - ◇ 0 points for no mention of financing.
- 1 point for identification of goals for resident outcomes and how they will be measured.
 - 1 point for description of feedback mechanism, conflict resolution between property management and resident services, and privacy protocols for storing tenant information.

OTHER PRIORITIES

This state has the following priorities:

- The Maryland Department of Housing and Community Development (DHCD) has established the following set of priorities to guide the award of competitive funding:
 1. Family Housing in Communities of Opportunity.
 2. Housing in Community Revitalization and Investment Areas.
 3. Integrated Permanent Supportive Housing Opportunities.
 4. Preservation of Existing Affordable Housing.
 5. Elderly Housing in Rural Areas of the State Outside Communities of Opportunity.
 6. Permanent Supportive Housing for Veterans and Persons Experiencing Homelessness.

Massachusetts | 2020–2021 QAP



State HFA homepage | Department of Housing and Community Development,
<https://www.mass.gov/orgs/housing-and-community-development>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides a definition with alternate requirements to those within the Fair Housing Act.

- With respect to senior housing, DHCD's priority is to provide support for those projects serving persons age 62 and older.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- 8 points for serving persons with disabilities or special populations as intended consumers (including frail elderly to be served in service-enriched senior housing or assisted living facilities):
 - » DHCD will award points in this category to projects that offer units for persons with disabilities integrated into larger projects. DHCD will award up to 8 points to projects that offer no more than 15% of the total number of units for persons with

disabilities — either individuals or families with a household member with disability. The points will be awarded only if the project design, amenity package, and services are appropriate for the population to be served. Sponsors should note that approval from the Executive Office of Health and Human Services will be required before DHCD can provide certain subsidy funds to support tax credit projects with units for persons with disabilities.

- » DHCD also will award points in this category to projects that serve other populations in need of support services. DHCD is a member of the Governor's Interagency Steering Committee on Supportive Housing (SH) and was instrumental in helping achieve the Committee's three-year goal of creating 1,000 SH units in less than two years. In 2020-2021, the Department will continue its financial assistance to supportive housing projects. Under this QAP, DHCD will provide up to 8 points in this category for projects that provide units with services that are appropriate for special populations that may include, but are not limited to, persons with disabilities, including but not limited to homeless veterans, other homeless individuals or households with identified special needs, including frail elderly to be served in service-enriched senior housing

or assisted living facilities. The points will be awarded only if at least 20% of the units in the project are reserved for a special population and if the project design, amenity package, and services are appropriate for the population to be served.

- » In 2017, DHCD established the requirement that sponsors of senior projects provide services appropriate for the intended tenants. Any developer seeking funds for senior housing projects in 2020-2021 must provide a highly developed service plan for the tenants who will live in the project. The Department wishes to ensure that this potentially vulnerable population — frail seniors — is provided with housing, but also with the services necessary to ensure their safety and enhance their quality of life. With respect to senior housing, DHCD's priority is to provide support for those projects serving persons age 62 and older.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

During 2020–2021, the Department encourages developers to structure projects that emphasize 12 development characteristics, including “projects that include more units than required that are accessible to persons with disabilities and that place emphasis on visitability.”

Up to 6 points for projects providing enhanced accessibility:

- DHCD will award up to 6 points to projects that incorporate any of the following into their plans and specifications.
 - » 5% or more Group 2 units (minimum 1 unit) in developments otherwise exempt from this requirement.

- » Provision of fully accessible common spaces in developments otherwise exempt from this requirement.
- » Group 1 units in adaptive reuse projects in existing buildings where Group 1 units are not otherwise required.
- » In projects that consist of 1 or 2 family dwellings that may otherwise be exempt, provide a minimum of 5% Group 2 units.
- » 5% of units outfitted with devices for vision or hearing impaired residents.
- » In Group 2 units, if not otherwise required by code, provide two accessible means of egress directly to the outdoors (that do not include an egress stair with an area of refuge).
- » Provision of features of Universal Design (see Appendix I, Part B).
- » Provision of features of Visitability beyond DHCD mandatory requirements (see Appendix I, Part C).

Up to 6 points for proximity to transit:

- DHCD encourages developers and municipalities to work together to locate projects near major public transit opportunities, such as subway stations, commuter rail stations, ferry terminals, and key bus routes. The benefits of locating housing — market rate and affordable — near such opportunities are receiving increased attention and recognition: lower transportation costs for residents; reduced dependency on cars; reduced vehicle miles traveled; health benefits to residents who walk more; and so on. To encourage locations near major public transit, DHCD will award points within this category as follows:
 - » 6 points for projects located within one-half mile of major public transit with nearby services such as retail or commercial opportunities, grocery or convenience stores, restaurants and municipal offices. Major public transit is defined as MBTA subway stops and commuter rail stops; MBTA or Regional Transit Authority (RTA) key bus route stops; and RTA intermodal transfer stations.

- » 3 points for projects located within three-quarters of a mile of major public transit with nearby services as defined in the preceding paragraph.

- It is DHCD's expectation that sponsors seeking points in this category also will be incorporating green, sustainable, and climate resilient elements into their project designs.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- 10% nonprofit set-aside;
- 70% production set-aside; and
- 30% preservation set-aside.

Additionally, applications to DHCD for funding awards in 2020–2021 will be required to fit within one or more of the following five categories:

- Housing for extremely low-income individuals (ELI), families, and seniors earning less than 30% of area median income with a particular focus on those who are homeless or at risk of homelessness. Projects in this category must be supported by tenant services and include at least 20% ELI units. Projects can serve families or individuals, seniors, persons with disabilities, and persons with special needs.
- Investment in distressed and at-risk neighborhoods where strategic housing investment has a strong likelihood of catalyzing private investment, improving housing quality, promoting occupancy for a range of household incomes, and supporting a broader concerted plan for community revitalization through investment in jobs, transportation, and education. Projects in this category include projects located in the Commonwealth's 24 Gateway Cities and/or Qualified Census Tracts (QCTs, as defined by Section 42 of the Internal Revenue Code). Projects serving families, seniors, persons with disabilities, or populations with special needs are eligible in this category.
- Preservation of existing affordable housing that extends affordability in situations that are consistent with QAP policies and the preservation working group policies. (Please

refer to the preservation matrix included in this document in the section beginning on page 25.) Projects serving families, seniors, persons with disabilities, or populations with special needs are eligible in this category.

- Family housing production in neighborhoods and communities that provide access to opportunities, including, but not limited to, jobs, transportation, education, and public amenities. Access to opportunity locations will be defined by publicly-available data. At least 65% of the units in a project must include two or more bedrooms, and at least 10% must be three-bedroom units, unless that percentage of two-bedroom or three-bedroom units is infeasible or unsupported by public demand. Projects serving families, including families with a member with a disability or special needs, are eligible in this category.
- Family or senior housing production in communities in which the affordable housing stock, as defined by the state Subsidized Housing Inventory (SHI), is lower than 12%. Sponsors who seek to build affordable senior housing in these communities should note that DHCD will evaluate each community's prior support for affordable family housing. This priority category first became available to sponsors in 2018.

Through the 2020–2021 QAP, DHCD intends to continue its emphasis on all the following matters related to the allocation process:

- The ongoing importance of managing project costs;
- The ongoing need to produce more units for extremely low-income (ELI) and homeless families and individuals;

- The ongoing need to strictly prioritize preservation projects, given constraints on volume cap and other resources;
- The ongoing need to produce more mixed-income housing, with units available to a broad range of households;
- The ongoing importance of producing more integrated housing opportunities for persons with disabilities; and
- The ongoing need to continue promoting thoughtful and strategic efforts to affirmatively further fair housing in every community in the Commonwealth.

Michigan | 2019–2020 QAP



State HFA homepage | Michigan State Housing Development Authority (MSHDA),
<https://www.michigan.gov/mshda/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides a definition with alternate requirements to those within the Fair Housing Act:

- Elderly: Projects in which 100% of the units serve tenants that conform to the federal agency(s) definition of elderly or the MSHDA definition of elderly under the MSHDA Act.
 - » MSHDA Act of 1966 defines elderly as: “Elderly” means a single person who is 55 years of age or older or a household in which at least 1 member is 55 years of age or older and all other members are 50 years of age or older.”

Additionally, in Michigan, Affordable Assisted living (AAL) is a specialized form of senior apartment housing that provides on-site personal care and health related services with rents priced at rates affordable to seniors with low to moderate incomes. AAL promotes tenant autonomy, dignity and privacy and provides a new community based option for consumers in need of long term care (LTC) and supports. A primary objective of the AAL effort is to integrate housing with community-based services; this involves developing accessible private apartments in tandem with access to private pay, Medicaid and other community based resources, including 24 hour supervision. The comprehensive array of services offered, proximity to community goods and services and the enhanced physical design features of residences supports tenant preferences

to Age In Place; tenants would not have to move to another setting as their health status and/or social or physical functioning capacities change. Further, Michigan promotes that AAL residences are a component of a Continuing Care Retirement Community model which offers a range of housing and health options at or near the AAL location. AAL residences provide housing with services to seniors (age 55 and older) with varying income amounts.

SET-ASIDES

10% statutory set-aside for elderly.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- 5 points for developments qualifying as affordable assisted living:
 - » Projects that are proposing an Affordable Assisted Living (AAL, as defined above) structure will be eligible for points. AAL projects must have been reviewed and approved by the AAL steering committee prior to application submission as evidenced by submission of an approval letter with the project application. If an AAL project

does not receive approval by the steering committee, it will not be prohibited from applying, but will not be eligible for these 5 points. The AAL steering committee will be composed of various industry members that are experienced in this form of housing.

- » AAL developments must submit a review packet approximately 45 days prior to the funding round due date for review by the AAL Steering Committee. Please see the timeline in the QAP for the specific deadline to submit the review packet. The review packet must contain a detailed concept letter describing the development team members, the location of the development, project specific information (units, sizes, rent levels, services, service providers, funding, etc.). Developments must also submit a copy of the most recent pro-forma for review by the AAL Steering Committee.
- 12 points for proximity to amenities, including senior center:
 - » Developments that are located within the required proximity to the amenities listed below will be awarded up to a maximum of 12 points. Applicants must demonstrate that they are within the required distance from the amenity by submitting a map that clearly highlights the location of the amenity as well as photographs of the specific amenity for which points are being claimed. If the documentation does not clearly demonstrate the proximity to the amenity, points may not be awarded for that amenity. Distances will be measured on a straight line as the crow flies and not according to walking distance.

Amenity Type	Non-Elderly	Elderly
Full service grocery within 1 mile	3	3
Pharmacy within 1 mile	3	3
General practice Dr. office/clinic within 1 mile	3	3
Park within 1 mile	3	3
Public school within 1 mile	3	
Senior center within 1 mile		3
Total possible points	12	12

BASIS BOOST

120% BB for Affordable Assisted Living developments that qualify for the Affordable Assisted Living points in the Scoring Criteria.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

5 points for proximity to transit:

- Applicants that can demonstrate that the project is located within ¼ of a mile from a public transportation stop (i.e., bus stop), or are creating a public transportation stop within ¼ of a mile, will be eligible to receive 5 points. Alternatively, a project will be considered for 5 points if the applicant can demonstrate that it will provide a form of transportation to the project that is comparable to or exceeding the service levels (e.g., accessibility, capacity, reliability, practicality) and scope of a typical fixed route public transportation system. For these purposes, comparable transportation should be available on weekends as well as weekdays and transportation that is provided by the development should have the capacity to adequately serve all the tenants in the development based on the size of the development. For example, one 15-passenger van may not be sufficient to serve a very large development. For further clarity, MSHDA expects that the transportation provided should be sufficient to allow each tenant in the development to take at least two trips during the seven day week. For example, a 15 passenger van running two routes per day seven days per week would accommodate 210 passengers per seven day week. This would be sufficient to accommodate a 100 unit development, which would require 200 trips per seven day week.
- Applicants choosing to provide another form of transportation to the project will only receive 3 points if it is determined that the transportation provided is not comparable to the service levels and scope of a typical fixed route public transportation system as noted above. No points will be awarded if MSHDA determines that the

form of transportation is very minimal/limited in nature.

- » PLEASE NOTE: The score for projects with multiple scattered sites will be determined by a weighted average based on the percentage of the total number of units at the sites that qualify for the points compared to the total units in the project. No partial points will be awarded and points will be rounded down in the case that a project’s weighted average score contains fractions of points.

3 points for accessible community space.

- Projects will receive 3 points for providing accessible community space for use by tenants, including individuals with children. The accessible community space is envisioned as one room or contiguous space that may be used for activities such as dining, crafts, exercise, medical clinic, socializing, birthday parties, holiday gatherings, study areas and/or other activities for individuals with children, or any other activity or use that may benefit tenants; and does not include common space such as hallways, offices, lobbies, bathrooms, laundry rooms, etc. To receive points, the accessible community space must, at a minimum, be sized according to the scoring grid below and must be located within a reasonable proximity to the proposed project, if the space is provided in a separate building. If an accessible community space being shared by multiple phases of the same project is proposed, it must meet the minimum square footage requirement for all of the units in all of the phases of the project that will share the accessible community space. Additionally, in the case of multiple phases, an easement agreement must be executed to allow the phases to have equal access to the accessible community space. A certification signed by the project Architect, Applicant, and Contractor must be submitted to demonstrate that the project will contain the minimum required amount of Accessible Community Space. A certification as well as an as-built drawing of the community space will also be required.

Number of Units	Minimum Square Feet
1 to 50 units	500
51 to 100 units	1,000
101+ units	1,500

3 points for visitable units:

- Projects that incorporate “visitability” design features into all units with first floor living space or access to units by elevator will receive points. The following design features are required to receive points:
 - » No step entry;
 - » Barrier free parking — with ramps as needed;
 - » Barrier free entry door;
 - » Barrier free ½ bath on first floor;
 - » Electrical switches at reachable heights; and
 - » Accessible route through the first floor living space.

3 points for barrier free units/ Fully-Adaptable-to-Barrier-Free Units:

- Projects that commit to building 10% of the units within the development according to barrier free or fully adaptable to barrier free standards will receive points.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these funding priorities and set-asides:

- Funding priorities (not statutory set-asides):
 - » Preservation: 25%.
 - » PSH: 25%.
 - » Open: 25%.
 - » Strategic Investment Category: 10%.
 - » Undesignated: 15%.
- Statutory set-asides:
 - » Nonprofit: 10% (federal requirement).
 - » Rural housing: 10%.
 - » Elderly: 10%.
 - » Eligible distressed areas: 30%.

Additionally, Michigan's QAP has the following clear priorities:

- Strong emphasis on access to opportunity. The QAP has a heavy emphasis on location because strong locations have significant benefits for residents. Among these benefits are the potential for enhanced quality of life, proximity to employment, and reduced transportation costs associated with living in walkable areas. Residents desire to live and work in locations where there is a high quality of life and where there are a multitude of opportunities to continue to better their current situation. Residents that are in need of affordable housing are no different in what they desire and affordable housing should be no different in what it offers them. It is for these reasons that the QAP intentionally focuses on areas of opportunity.
- Strong emphasis on housing in areas of opportunity.
 - » Proximity to transportation;
 - » Proximity to amenities;
 - » Education, health and well-being, economic security, and jobs, goods, and services;
 - » Developments located within an Opportunity Zone and/or a Rising Tide Community;
 - » Developments near Downtowns/Corridors;
 - » Developments near an Employment Center;
 - » Neighborhood Investment Activity Areas;
 - » Affordable/Market Rent Differential;
 - » Mixed Income Development; and
 - » Rural Set-Aside.
- The QAP has a heavy emphasis on location because strong locations have significant benefits for residents. Among these benefits are the potential for enhanced quality of life, proximity to employment, and reduced transportation costs associated with living in walkable areas. Residents desire to live and work in locations where there is a high quality of life and where there are a multitude of opportunities to continue to better their current situation. Residents that are in need of affordable housing are no different in what they desire and affordable housing should be no different in what it offers them. It is for these reasons that the QAP intentionally focuses on areas of opportunity.



State HFA homepage | Minnesota Housing, <http://www.mnhousing.gov/sites/np/home>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

7–10 points for serving people with disabilities:

- 10 points: 15%–25% of units (not fewer than 6 units).
- 9 points: 10%–14.99% of units (not fewer than 5 units).
- 7 points: 5%–9.99% of units (not fewer than 4 units).
- Permanent housing proposals are not restricted to persons of a particular age group. A percentage of the units are set aside and rented to persons with any of the following disabilities:
 - » A serious and persistent mental illness as defined in Minn. Stat. § 245.462, subdivision 20, paragraph (c);
 - » A developmental disability as defined in United States Code, Title 42, Section 6001, paragraph (5), as amended;
 - » Assessed as drug dependent as defined in Minn. Stat. § 254A.02, subdivision 5, and are receiving or will receive care and treatment services provided by an approved treatment program as defined in Minn. Stat. § 254A.02, Subdivision 2; and

- » A brain injury as defined in Minn. Stat. § 256B.093, Subdivision 4, paragraph (a) v. Permanent physical disabilities that substantially limit major life activities, if at least 50% of the units in the project are accessible as provided under Minnesota Rules Chapter 1341.
 - To be eligible for these points, the applicant must have, among other requirements, a singled Service Agreement: The property owner must have an agreement with the county or tribal human services office specifying:
 - » How they will provide outreach to the target population;
 - » How eligible applicants will be referred to the property management agent;
 - » That verification of applicant disability will be provided to the owner;
 - » The types of services appropriate to the population that will be made available with the goal of housing stability;
 - » Service funding sources;
 - » How services will be provided to tenants;
 - » How the service entity will communicate and coordinate with property management; and
 - » Plans for crisis intervention, eviction prevention and lease mitigation.
- 1–9 points for location efficiency, including access to transit, walkability, and urbanization. Specific points vary based on a number of factors, including type of transit/walkability provided, at what distance from the proposed project the amenity is located, and the type of community and geographic region in which the project is located.
- 3 points for universal design:
- A unit that includes all Minimum Essential Universal Design Features (listed in QAP), along with 8 Optional Features for units in a new construction or adaptive re-use project, and four Optional Features for units in a rehabilitation project. Type A accessible units also meet the definition of a Universal Design Units.
 - » 3 points: A elevator building with 100% of assisted units meeting the definition of a universal design unit; or
 - » 3 points: a non-elevator building with at least 10% of assisted units meeting the definition of a Universal Design Units.

OTHER PRIORITIES

The state prioritizes other types of development through these set-asides:

- 10% nonprofit set-aside; and
- Rural development/small project set-aside.
 - » Minnesota Housing designates a portion of the state’s HTC volume cap to Rural Development (RD) financed projects, or small projects with a site located in a RD service area consisting of 12 or fewer units, will receive a special set-aside administered by Minnesota Housing until the end of Round 2, or until it is determined that there are no eligible applications for the set-aside.

Mississippi | 2019–2020 QAP



State HFA homepage | Mississippi Home Corporation, <https://www.mshomecorp.com/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state uses the same definition as the federal Fair Housing Act without referencing it directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- 10 points for providing elderly housing:
 - » A development will be considered an Elderly Development if 100% of its units will be occupied by persons 62 years of age or older or if at least 80% of its units will be occupied by persons 55 years of age or older. The application package must include a statement from the development owner specifying which age group the development will target. The development will be required to provide its tenants with a secure living environment and emergency pull cords/call button in each unit. In addition, the development must include such services as preventive health care programs, information and counseling, social activity programs, and transportation to facilitate access to social services. Developments that receive points for Large Family, Housing for Disabled Persons Targeted by Mississippi Affirmative Olmstead

Initiative or Veterans are not eligible for these points.

Award points for certain features in properties serving older adults:

- This state does not provide points for on- or off-site amenities that may be beneficial to populations of older adults.

BASIS BOOST

Developments are not automatically qualified for the State's Discretionary Basis Boost. For consideration, Applicants must submit a written request for prior approval to MHC by the deadline date specified in Section 2 of the QAP.

- Properties targeting special needs populations, which MHC limits to the elderly for the purposes of this basis boost, are eligible for a 130% basis boost.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Up to 10 points for development amenities (including service coordinator): Developments will be awarded points (as stated below) per development amenity up to a maximum of 10 points. Amenities must be appropriate to the proposed tenant population. All proposed amenities must be selected on the application and notated and highlighted on the Plans/Drawings or Physical Needs Assessment.

Applicants must adhere to all amenities selected on the application, regardless of whether or not points are awarded.

- Service Coordinator Developments that contract with a third-party Service Coordinator to provide programs and services to its tenants may receive up to 6 points. The application must include a Memorandum of Understanding between the Owner and the Service Provider that includes the scope of services to be provided, the length of the contract and the annual cost to the development. The development must be able to demonstrate financial feasibility with the cost of the Service Coordinator as a line item on the Development 15-Year Pro Forma. All services to be provided must meet MHC's requirements as outlined in Section 1.5(2) of the Qualified Allocation Plan. MHC must be notified in writing of any changes to the Service Provider.
 - » 6 points for a full time (min 40 hours/week) Service coordinator.
 - » 3 points for a part time (min 20 hours/week) Service coordinator.
- Neighborhood services: points may be awarded to a proposed development that has at least two of the following services located within ½ mile of the proposed site:
 - » Grocery store;
 - » Pharmacy;
 - » Bank or credit union; and
 - » Hospital or medical clinic.
- Furnished clubhouse or community building: The Clubhouse/Community Building must have

a designated room for tenant activities and meetings. Also, it must meet the requirements of MHC's Minimum Design Quality Standards. Multi-phase developments may share the Clubhouse/Community Building provided that it will accommodate the development size.

- Walking, jogging, or biking trail: The trail must be an asphalt or concrete paved surface measuring at least 5 feet in width and a minimum of ¼ mile in distance. The trail must be separate from the required sidewalks.
 - Landscaped area including a gazebo with sitting area: The landscaped area must include a site built and permanently affixed gazebo with sitting area. The gazebo must be a minimum of 400 sq ft under roof.
- 10 points for providing housing for veterans (these points cannot be claimed if claiming 10 points for elderly housing):
- Housing for Veterans is defined as a household that includes one or more persons that is eligible for Veteran benefits as documented by the United States Department of Veterans Affairs. A minimum of 10% of the units must be set aside for Veterans. Letters of support and collaboration from the nearest Veterans Administration Hospital or community-based outreach clinic are required to demonstrate coordination of veteran-specific resources and services. Developments that receive points for Elderly or Housing for Disabled Persons Targeted by Mississippi Affirmative Olmstead Initiative are not eligible for these points.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- 10% nonprofit set-aside;
- 25% smaller credit amount set-aside; and
- 65% (remainder) statewide set-aside.



State HFA homepage | Missouri Housing Development Commission, <http://www.mhdc.com/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features included in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

MDHC's QAP does not include a competitive scoring system. Instead, the Housing Commission's priorities are made by awarding basis boosts.

- Service-Enriched Housing (eligible for up to 30% boost in eligible basis). Service-Enriched Housing enhances the connection between affordable housing and supportive services. MHDC recognizes the advantages of supportive housing to individuals, communities and on public resources. To encourage more comprehensive housing environments for vulnerable populations, proposals offering significant services tailored to the tenant population will receive a preference in funding ("Service-Enriched Priority"). Developments which offer substantial services to enhance tenant housing stability and independence increase the competitiveness of their application. Proposed services should take into account the unique characteristics of residents and help them to identify, access, and manage available resources. Other benefits of a well-planned and properly funded program may include reduced resident turnover, improved property appearance, and greater cooperation between residents and management.
 - » To be considered under the Service-Enriched Priority, a development's services must target a specific population, including seniors.
- Project may qualify for a basis boost if it is determined to meet the qualifications of the Service-Enriched Priority.
- Developments providing housing opportunities for persons with special needs are strongly

encouraged. Developments committing to a special needs set-aside of at least 10% of the total units, will receive a preference in funding (“Special Needs Priority”) as one of the Set-aside Preferences.

» “Special needs:” a person with special needs is a person who is: (a) physically, emotionally or mentally impaired or is diagnosed with mental illness; or (b) developmentally disabled.

- Independence Enabling Housing Units (eligible for up to 30% boost in eligible basis). MHDC seeks to fund a pilot program designed to promote independent living amongst our special needs population. Independence enabling housing units (“IEH units”) that are developed to serve special needs individuals who wish to live independently but who may need additional assistance from a caregiver who resides in a companion living unit (“CL Unit”) that is associated with a specific IEH unit are encouraged. These IEH and CL units should be designed in such a manner that the IEH and CL units are conveniently located to each other and are part of a larger development that is inclusive to all persons. The design of the units must satisfy the requirements of Universal Design and be accessible to all persons regardless of any particular type of disability or condition. The units must be distributed evenly within a given development and must maintain equivalent access to the amenities and services that the development may provide. For this pilot program, the minimum set-aside of units will be waived and a maximum set-aside of 30% established. Developers should engage a lead referral agency to assist with the design and management of these units.
- Veteran’s Housing (eligible for up to 30% boost in eligible basis) Applicants developing Service Enriched Housing targeting Veterans are eligible for this priority. Developments must offer significant services tailored to the Veteran tenant population. Provided services should enhance Veteran tenant housing stability and independence. A substance abuse program must be included in the proposal.
- Transit Oriented Development (TOD) (eligible for 30% boost in eligible basis). The following criteria will be considered in the determination of a development’s ability to meet the definition of a TOD:
 - a. The development must be located within 1,750 feet of a transit stop.
 - b. The development must include a mix of transportation choices, including biking and walking.
 - c. Transit service at the stop must be frequent (every 15 to 30 minutes).
 - d. The transit service must offer increased mobility choices and good transit connections.
 - e. The master development plan must include a balanced mix of uses, providing residents the ability to live, work, and shop in the same neighborhood.
 - f. The master development must include significant retail development.
 - g. The master development must include a mix of housing choices (rental and for-sale, affordable and market-rate).

OTHER PRIORITIES

This state prioritizes other types of development through the following basis boosts:

- **Workforce Housing** (eligible for 30% boost in eligible basis). Developments in counties with a median income less than the 2016 statewide median income (as established and published by HUD) are eligible for the basis increase, provided that 15% to 25% of the total units in the development are set aside for households earning between 60% and 80% (workforce units) of the area median income. Rents in the 60% to 80% units should be different than tax credit rents in the development. The intent is to capture the households that are just over the tax credit income limits but still have a need for quality affordable housing. The published income limits for each development's county still apply and must be used for determining resident eligibility.
- **Transit Oriented Development**
- **Vulnerable Persons:** It is the policy of MHDC, as the housing finance agency of the state of Missouri, to support housing for vulnerable persons. Developments committing to a set-aside of at least 10% of the total units for vulnerable persons, will receive a preference in funding ("Vulnerable Persons Priority") as one of the Set-aside Preferences. For purposes of administering the Federal LIHTC, a vulnerable person is a person who is: (a) homeless, including survivors of domestic violence and human or sex trafficking; or (b) a youth transitioning from foster care.



State HFA homepage | Montana Housing, <https://housing.mt.gov/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- Tenant Populations with Special Housing Needs (100 points possible):
 - » An Application will be awarded 10 points for each 5% of the units targeting the following identified needs up to a maximum of 100 points. The Application must specify the number of units targeted for each category. Section B Part XII, Units Accessibility, of the UniApp will be used to calculate the score for this item. Units may not be counted more than once or in more than one category for purposes of awarding points.
 - ◇ If the Project is an Elderly Property as defined in federal law, the Application will receive 100 points under this provision.

Points for certain features in properties serving older adults.

- This state does not award specific points for features included in properties.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Service Commitments/Understandings:

- 30 points will be awarded if a narrative includes the Owner/Developer commits to provide or arrange for provision of one or more specifically described supportive services for the duration of the Extended Use Period. The narrative must provide evidence of how such described supportive services will benefit the Project. The same component of participation may not be counted toward more than one item, and may be given credit by an award of points only once. Points will not be awarded for the same item in both this Development Evaluation Criteria 7 and Development Evaluation Criteria 5, Preservation of Affordable Housing.
- Project accessibility requirements: Walls adjacent to toilets, bath tubs, and shower stalls must be reinforced for later installation of grab bars; No-step entry to all ground floor level units.
- Medical services appropriate and available to all prospective tenants (e.g., hospital, doctor offices, etc.).

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- 10% set-aside for tax-exempt organizations (this is a federal requirement); and
- 20% set-aside for Small Rural Projects For purposes of this set-aside, a Small Rural Project is a Project:
 - » For which the submitted tax credit Application requests tax credits in an amount

up to but no more than 12.5% of the state's Available Annual Credit Allocation; and

- » Proposed to be developed and constructed in a location that is not within the city limits of Billings, Bozeman, Butte, Great Falls, Helena, Kalispell, or Missoula.



State HFA homepage | Nebraska Investment Finance Authority, <https://www.nifa.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- 1 point for Senior Developments: The applicant must certify that the following requirements will be met by checking the following: Units will meet the minimum square footage of 650 square feet for a one bedroom unit and 800 square feet for a two bedroom unit (senior housing may only consist of one or two bedroom units).
- » NOTE: Developments proposing the acquisition and rehabilitation of an existing senior development may request a waiver of the minimum square footage requirements. The development will include handrails along steps and common areas, grab bars in bathrooms, routes that allow for barrier-free access, lever-type doorknobs, single-lever faucets and elevators for developments with more than two stories. The development

is located on a suitable site that is within reasonable walking distance of basic services or has adequate access to public transportation. The units will be restricted to seniors who qualify for an exception of exemption under the Fair Housing Act.

Award points for certain features in properties serving older adults:

- This state does not award points for certain features in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

1 points for each unit equipped with a medical alert/emergency response system at no cost to the tenant.

Maximum of 3 points for providing supportive services including:

- 1 point for transportation to services at no cost to the tenant (12 round trips).
- 1 point for monthly onsite medical, dental or vision testing at no cost to the tenant.
- 1 point for owner paid renter's insurance for tenant (yearly).

- 1 point for onsite congregate meals served to the tenant at no cost (monthly).
- Monthly onsite, organized tenant activities offered at no cost to the tenant, such as exercise classes, movie nights, potlucks or financial assistance classes.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- 10% set-aside for tax-exempt organizations (this is a federal requirement);
- Metro/Non metro set-aside: 50% Metro, 50% non metro; and
- Up to 33% for CRANE program.
 - » Which requires that those applying for the program substantially benefit certain

populations, including: Housing for individuals with special needs (such as persons with serious/chronic mental illness, physical or developmental disabilities, substance abuse issues, homeless, or those experiencing severe economic distress), including housing for populations with incomes below 30% of the applicable Area Median Income (AMI). At least 30% of the units must serve individuals with special needs.



State HFA homepage | Nevada Housing Division, <https://housing.nv.gov/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state uses the same definition as the federal Fair Housing Act without referencing it directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- 2 points for Special Needs and for Senior Projects Only. Removable cabinet fronts at all kitchens and bathroom sinks in all apartments.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

- 2 points for grab bars at all bathtubs and showers in all apartments. To qualify for these points, the grab bars must be specified for handicapped use and meet ADA requirements.
- 3 points for projects that opt to exceed the HUD 5% and 2% accessibility requirement¹¹ by ensuring that 21% of units (15% mobility/6% A-V) are adaptable/accessible.
- 2 points for location: The site (or designated center of the site for scattered-site projects) is within ¼ mile of at least three of the following: grocery, pharmacy, bank, school, day care, parks, community centers, medical facilities, library, place of worship, post office (proximity to day care facilities is not applicable for Senior Housing projects).

Supportive Services, up to 6 points:

- 2 points for transportation services — on-site van service with minimum two — day per week operating schedule.
- 2 points for on-site service coordinator for minimum of 10 hours per week (on-site office must be provided).
- 4 points for on-site service coordinator for minimum 20 hours per week (on-site office must be provided).

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- 10% Non Profit;
- 10% USDA-RD Set-Aside (Acquisition/ Rehab Only); and
- 10% Additional Tax Credits: projects which have not yet been placed in service which were awarded credits within the immediately preceding two years which have had reasonably unforeseeable increased construction costs or decreases in credit pricing that result in a financing gap, after the prior year application, and subject to the conditions of this section.



State HFA homepage | New Hampshire Housing, <https://www.nhhfa.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- 5 points for Service Enriched Housing for Age Restricted Units Contracting with a VNA/ homecare agency to provide onsite health clinics at no cost to residents (although Medicare and other insurances may be billed for services) for a minimum of ten years from initial occupancy. Health clinics may include, but are not limited to flu shots, blood pressure, cholesterol and diabetes screening, and foot care. Clinics must be provided by a licensed healthcare professional. A minimum of 1/16 hour, per unit, per month is required to be provided no less frequently than bi-monthly.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

15 points for Supportive Housing Serving Homeless or Veterans. Supportive services must include at a minimum:

- An initial assessment of each resident's housing stabilization needs prior to or within one week of move-in and a written service plan developed to address each need.
- Regular case management, including ongoing assessments of residents' housing stability and the efficacy of the services being coordinated or provided in meeting the needs identified in their service plan.
- Onsite services targeted to housing stabilization. Participation in services may be encouraged, but must be optional for residents.
- 5 points for a Community Room. Points will be given to projects with a community room that is separate (or separable by a partition) from building entrances, stairwells, and elevators.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides and other incentives:

- Non Profit Set-Aside (10%); and
- Supplemental Set-Aside: \$60,000 of the annual LIHTC allocation shall be set aside for projects returning for supplemental LIHTCs after having received a carryover allocation in an earlier year. Requests made under this set-aside can be up to \$30,000. The decision will be made by the Authority staff and projects must meet one or more of the following criteria:
 - » Incurred or faces substantial, unforeseen cost increases;
 - » It is subject to an unanticipated reduction in equity yield on the sale of the LIHTCs;
 - » Supplemental LIHTCs would reduce the level of Authority capital subsidy funding;
 - » Supplemental LIHTCs would improve the project's financial feasibility but keep it consistent with the Authority's Underwriting Standards and Development Policies for Multi-Family Finance.



State HFA homepage | New Jersey Housing and Mortgage Finance Agency,
<https://www.nj.gov/dca/hmfa/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

Senior Cycle: Senior projects may apply to this cycle. Not less than 20% of the total credits awarded in the Family, Senior, and Supportive Housing Cycles will be available in the Senior Cycle, and the maximum annual allocation of credits to developments competing in this cycle is \$1,400,000. Total development costs shall not exceed \$250,000 per unit for buildings of one to four residential stories, \$275,000 per unit for buildings with five or six residential stories, and \$300,000 per unit for buildings with over 6 residential stories, excluding capitalized permanent reserves, non-basis eligible off-site improvements, up to \$10,000 per unit and \$400,000 maximum for community center or social service space (subject to third-party cost certification), and required deferred developer fee, if any. If multiple tranches of this Cycle are awarded, all set-asides for this Cycle will be applicable to each tranche. Minimum rehab projects are not eligible to apply in this cycle. Unless market area demographics demonstrate otherwise, one-bedroom units should comprise at least 85% of the project. There is one set-aside in the Senior Cycle:

- HOPE VI/Choice Neighborhood set-aside:
The first reservation of credits from the Senior

Cycle shall be given to the highest-ranking eligible application from a HOPE VI or Choice Neighborhood project with a majority of its units located within a Qualified Census Tract. If, because of lack of demand, this set-aside is not utilized, the credits shall be released into the Senior Cycle for use by other eligible applications.

POINTS

Award points for providing housing for older adults:

- This state does not award points for providing housing for older adults.

Award points for certain features in properties serving older adults:

- Location: For developments competing for the Senior Cycle: Unless otherwise indicated, projects located within ½ mile of the positive land uses in (a)11i(1) through (15) below or, with respect to (a)11i(16) and (17) below only, inclusion within the defined categories, shall receive 2 points:
 - » Full-service grocery store or supermarket (minimum 15,000 sq ft);
 - » Pharmacy;
 - » Department or retail merchandise store;
 - » Bank/credit union;
 - » Restaurant, exclusive of fast-food restaurants;

- » Indoor public recreation facilities, such as civic centers, community centers, and libraries;
- » Outdoor public recreation facilities; such as parks and swimming pools;
- » Hospital/medical clinic;
- » Medical offices (physician, dentistry, optometry);
- » Senior center;
- » Religious institution — eligible for only 1 point;
- » Post office, city hall, county courthouse;
- » Fire/police station;
- » Location within a brownfield site; and
- » A redevelopment project.

A project that is fully located within a municipality wherein 25% or less of the occupied housing units are renter-occupied housing units and 25% or more of the municipality is 55 years of age or older shall receive 2 points. NJHMFA shall rely upon the American Community Survey Five-Year Estimates, Table S2502 (Demographic Characteristics for Occupied Housing Units) and Table DP05 (ACS Demographic and Housing Estimates), U.S. Department of the Census. NJHMFA shall rely upon the data effective in the calendar year of the application deadline as well as in the preceding year.”

Because the availability of social services greatly improves the quality of life for residents, NJHMFA awards up to 6 points for the provision of up to three social services for the compliance period. 2 points

will be awarded per service offered. For projects in the Senior Cycle, participation in the Services for Independent Living (SIL) program qualifies for the maximum points. The services shall be affordable, appropriate, available and accessible to the project’s tenants. Services provided free of charge to all residents/seniors of a county/ municipality based solely on residency status shall not qualify for points in this category. Applicants shall support their claim to provide social services by providing the following:

- 2 points for emergency panic/call button, necklace, or bracelet for all residents — senior projects only.
- Up to 4 points for Project Amenities:
 - » A community room/building (minimum 1,600 square feet);
 - » On-site laundry facilities, using ENERGY STAR-labeled commercial equipment; and
 - » Community gardens.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS:

2 points for a project that is fully located within ½ mile of public transportation.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- Supportive Housing Cycle; and
- Family Cycle.



State HFA homepage | New Mexico Mortgage Finance Authority, <http://www.housingnm.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- Up to 15 points for projects Reserved for Seniors Housing Priority.

Award points for certain features in properties serving older adults:

- Up to 15 points for projects Reserved for Seniors Housing Priority:
 - » 7 points for housing priority and design requirements met (must be met to be eligible for further points in this category).
 - » 3 points for community building and all units incorporate universal design (must be evidenced in plans and specifications).
 - » Service enrichment scoring (requires service coordinator for point awards): Providing one prepared meal on a daily basis, available to all tenants at little or no cost to tenants — 2 points for congregate meals, 1 point for meal service.

- » 1 point for bi-monthly health and nutrition education. Examples include, but are not limited to, fitness classes, walking programs, seminar instruction on cooking for one, and information on the Supplemental Nutrition Assistance Program (SNAP).
- » 1 point for quarterly blood pressure or other health screening.
- » 1 point for quarterly computer training.
- » 1 point for social events designated to provide engaging activities for residents “build community” such as holiday potlucks, arts and crafts events, book clubs, creative writing, bingo and other games, field trips to the movies or a museum or other place of interest, etc. Bi-monthly or six per year (qualified service provider not required).
- » 1 point for Beyond Financial Literacy — financial counseling and tax preparation-educational programs to occur quarterly and focus on one or more of the following topics: budget counseling, financial planning assistance, credit score counseling, avoiding credit traps, income tax preparation in partnership with CPAs or a VITA program or local community college.
- » 1 point for gardening: delivery of at least 4 monthly gardening classes per year during the growing season by a qualified instructor plus provision of gardening space of at least

3 square feet per unit for at least 50% of the units in the Project.

- » 1 point for Estate Planning and End of Life Planning — educational programs to occur quarterly and focus on one or more of the following topics:
 - ◇ Estate planning 101 — what is and do you need the following: advance health care directive (living will); durable power of attorney for healthcare and HIPAA release; durable power of attorney for finances; a will and revocable living trust;
 - ◇ What is hospice and does Medicare cover this?;
 - ◇ Probate: what is it and how to avoid it; and
 - ◇ Funeral planning.
- » Other — MFA approved service. Must be approved by MFA in writing one month before Application due date. 1 to 2 points each, as deemed appropriate.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Projects located in proximity and connected to services and public transportation are eligible for 4 points. Projects located in proximity and connected to services or public transportation are eligible for up to 2 points for each of these criteria.

Public transportation must be established and provided on a fixed route with scheduled service. Alternative forms of transportation may be acceptable provided sufficient documentation is provided that establishes the alternate form of transportation is acceptable to MFA.

Households with Special Housing Needs Housing Priority:

- Option A (up to 15 points): 20% of total units reserved for households with special housing needs (see definition in Glossary). To be eligible for points under this option, at least 10% of the total units in the Project must be rent restricted at 30% of Area Median Income (AMI) or have permanent rental subsidy support with a project-based federal rental assistance contract that ensures residents do not pay rent in excess of 30% of their adjusted income.
- Option B (up to 5 points): 5% of total units reserved for households with special housing needs and 5% of the total units rent restricted at 30% of AMI.
 - » 5 points for free transportation services to support medical and social service needs — minimum 2 days per week. Bus passes are not sufficient to satisfy this scoring item.
 - » 2 points for food pantry — onsite, or contiguous and accessible to the property and of adequate size with reasonably sufficient quantities of food, both perishable and non-perishable.
 - » 3 points for health promotion/disease prevention/wellness classes or blood pressure or other health screening — provided at least every 2 months onsite and provided by a qualified service provider. Any health services must be provided by a licensed individual or organization. Examples include substance abuse counseling, crisis prevention and intervention, mental health counseling/therapy, etc.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- Non profit set-aside (10%).
 - » USDA Rural Development Set-Aside.

The state also lists the following priorities:

- Households with Children are identified as a priority by MFA.
- Households with Special Needs are identified as a priority by MFA.



State HFA homepage | New York State Division of Homes and Community Renewal,
<https://hcr.ny.gov/multifamily>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

Persons with special needs shall mean: persons with HIV/AIDS; persons with alcohol/substance abuse disorders; persons with psychiatric disabilities; homeless persons and families; persons with physical disabilities; persons who have been victims of domestic violence; persons with mental retardation/developmental disabilities; frail elderly persons; or any other population so designated by the Division.

SET-ASIDES

NYCHA Seniors First: As part of a long-term commitment to increasing affordable housing opportunities for seniors, HCR will set-aside up to \$15 million in 9% LIHTC over several years for 1,000 units that are part of the New York City Housing Authority (NYCHA) and the New York City Department of Housing Preservation and Development (HPD) Seniors First Initiative. In order to qualify under the NYCHA Seniors First Set-Aside, applicants must demonstrate that the project:

- Received an award of site control of under-utilized housing authority property through the NYCHA and HPD Seniors First Initiative;
- Is located in Central Brooklyn; and

- Received the endorsement of the Independent Emergency Manager or such other monitor as may be designated by HCR in its sole discretion.

Projects must be intended for and solely occupied by persons 62 years of age or older. Projects must also be 100% affordable.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- This state does not award points for certain features in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Points for incorporating easy access to public transportation and/or promote walkable communities in which essential goods and services are accessible within a short and safe walking distance.

At least 5% (rounded up to the next whole number) of the project units are fully accessible and adapted, move-in ready, which includes a roll-in shower with an attached seat or is designed to accommodate a roll-in shower with an attached seat which will be installed at the owners expense upon request, for person(s) who have a mobility impairment and the unit(s) will be marketed to households with at least one member who has a mobility impairment; and at least 2% (rounded up to the next whole number) of the project units are fully accessible and adapted, move-in ready for person(s) who have a hearing or vision impairment and the unit(s) will be marketed to households with at least one member who has a hearing or vision impairment.

Persons with special needs (5 points). Scored if the project will give preference in tenant selection to persons with special needs, with priority being given to such persons who have served in the armed forces of the United States for a period of at least 6 months (or any shorter period due to injury incurred in such service) and have been thereafter discharged or released therefrom under conditions other than dishonorable, for at least 15% of the LIHC-assisted units and whether the persons with special needs will be served by supportive services as evidenced by a comprehensive service plan and an agreement or commitment in writing with an experienced service.

OTHER PRIORITIES

This state prioritizes other types of development through these set-asides:

- Empire State Supportive Housing Initiative Projects: In order to qualify under this set-aside, applicants must demonstrate:
 - » They have received a Conditional Award Notification through the Empire State Supportive Housing Initiative, Inter-Agency Service and Operating Funding Opportunity RFP to fund appropriate services for the targeted population;
 - » The proposed project gives preference in tenant selection to persons with special needs for at least 50% of the project units; and
 - » The project satisfies the definition of supportive housing cited in Section 2040.2(u) of the QAP, provided however that applicants may satisfy the capital financing requirement of that definition by requesting SHOP funds pursuant to this RFP.
- Supportive Housing Projects: A Supportive Housing Project, as defined in Section 2040.2(u) of the QAP and this RFP, is a project that gives preference in tenant selection to persons with special needs for at least 50% of the project units. Persons with special needs for the purposes of this set-aside are defined in Section 2040.2(p) of the QAP. To be considered a Supportive Housing Project under this set-aside, an application must:
 - » Document the need for housing for the targeted population within the primary market area (may include Continuum of Care data or local data that was collected as part of community planning activities);
 - » Provide a comprehensive service plan and an agreement in writing with an experienced service provider that ensures the delivery of appropriate services for which a documented need exists for the targeted population;
 - » Propose a project site in close proximity to public transportation, or include a transportation plan as a component of the comprehensive service plan to ensure access to necessary services;
 - » Include a provision for an ongoing rental subsidy or other form of subsidy to ensure rents paid by the targeted population remain affordable;
 - » Demonstrate a firm commitment for capital financing from a governmental agency

serving the proposed target population and/or have a commitment of service and operating funding from a governmental agency serving the proposed target population;

- » Identify a public agency or experienced service provider with which a written agreement has been executed to refer eligible persons and families for the targeted units; and
- » The project must provide an integrated setting that enables individuals with disabilities to live independently and without restrictive rules that limit their activities or impede their ability to interact with individuals without disabilities.
- Housing Opportunity Projects: In order to qualify under the Housing Opportunity Projects Set-Aside, eligible projects must be located in census tracts with poverty rates at or less than 10%, according to 5 year averages from the American Community Survey and average school testing scores in the upper two quartiles of proficiency scores for 3 through 8 grade English

and Math exams statewide (averaged over the past 5 years). (See hcr.ny.gov/multifamily for a list of these census tracts.) Proposed projects must have an average unit size of at least 2 bedrooms. HOP projects may not be: 1) intended for, and solely occupied by persons 62 years of age or older; or 2) intended and operated for occupancy by persons 55 years of age or older. Proposed projects must also target at least 10% of project units to households at or below 30% of AMI. Applications that clearly advance this goal will be eligible for a 130% LIHTC basis boost, based on a DHCR designation, as authorized by the Housing and Economic Recovery Act of 2008.

- Vital Brooklyn: Vital Brooklyn is New York State's new comprehensive community development initiative that addresses chronic social, economic, and health disparities in central Brooklyn, one of the most underserved areas in the State. HCR will set aside resources for projects awarded under the Vital Brooklyn Requests for Proposals.

North Carolina | 2020 QAP



State HFA homepage | North Carolina Housing Finance Agency, <https://www.nchfa.com/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- For Senior Projects, proximity to a Senior Center is awarded up to 3 points, depending on distance.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Location:

- Up to 7 points for proximity to a Pharmacy.
- Up to 3 points for proximity to Healthcare.
- Up to 12 points for proximity to Grocery store.
- Up to 3 points for proximity to public facility (including library, community center, or public park).
- Up to 6 points for proximity to a bus/transit stop, if it is within ¼ mile of proposed project site entrance, served by the public transportation system 6 days a week, and is at a fixed location with a covered waiting area (if no covered waiting area, bus/transit stop qualifies for 2 points).

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- Rehabilitation Set-aside — up to 10%;
 - New Construction Set-Aside — based on Geographic Regions. West is up to 16%, Central is up to 23%, Metro is up to 38%, East is up to 23%;
 - Nonprofit Set-Aside, 10%; and
 - USDA Rural Development, up to \$750,000.
- All projects will be required to target 10% of the total units to persons with disabilities and persons who are homeless. Projects with federal project-based rental assistance must target at least 5 units regardless of size. Projects that have targeted units under this subsection are not required to provide onsite supportive services or a service coordinator.



State HFA homepage | North Dakota Housing Finance Agency, <https://www.ndhfa.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides a definition with alternate requirements to those within the Fair Housing Act.

- Projects that are designed for and marketed to households consisting of individuals 55 years of age and over.

Special Needs (in the context of Permanent Supportive Housing):

- Persons suffering from chronic or persistent mental illness;
- Persons suffering from chronic chemical dependency;
- Persons with disabilities (physical and/or developmental);
- Individuals or families who are experiencing long-term homeless, or at significant risk of long term homelessness; and
- The frail elderly, defined as those 62 years of age or older, who are unable to perform one or more “activities of daily living” without help. Activities of daily living comprise walking, eating, bathing, grooming, dressing, transferring, and home management activities.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- 5 to 20 Points for Permanent Supportive Housing for special needs populations, which include:
 - » The frail elderly, defined as those 62 years of age or older, who are unable to perform one or more “activities of daily living” without help. Activities of daily living comprise walking, eating, bathing, grooming, dressing, transferring, and home management activities.
 - ◇ 5 points for 10% of the units.
 - ◇ 8 points for 15% of the units.
 - ◇ 11 points for 20% of the units.
 - » Services: For Frail Elderly, securing access to meal services adequate to meet nutritional needs, housekeeping aid, personal assistance, or other services essential to maintaining independent living.

Award points for certain features in properties serving older adults:

- Projects that are designed for and marketed to households consisting of individuals 55 years of age and over and include a community room with kitchen facilities for the use of the tenants of the project at no charge will receive 8 points. The marketing plan must be consistent with Fair Housing requirements for 55 and over housing.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Universal Design: Projects which meet the minimum universal design features below are eligible for points in this scoring category based on a percentage of units:

- 3 points for at least 10% of the units.
- 6 points for at least 15% of the units.
- 9 points for at least 20% of the units.

Universal design units must be wheelchair-accessible and contain design features which may exceed the ADA standards, but which allow a project to be usable for the greatest possible percentage of the population. For purposes of this scoring category, the required minimum universal design features include, to the extent allowed by local building code:

- Roll-in or walk-in shower in at least 1 bathroom in the unit;
- Any additional bathrooms containing a bath tub should include a transfer seat, grab bars, and a floor drain to handle water splashed onto the floor during transfer;
- Front loading washing machines and dryers with accessible controls;

- Dishwasher;
- Lever handles on all doors and fixtures;
- Security doors with automatic openers;
- Accessible garbage dumpsters;
- Covered outside entries with adequate lighting;
- Kick plates on apartment doors to prevent damage from wheelchairs;
- Apartment doors which are wieldy for persons using a wheelchair or a walker;
- Hard surface flooring with maximum threshold heights of ½” beveled or ¼” square-edged;
- Appliances with front controls;
- Controls for the garbage disposal, range hood light, and exhaust fan located on the front of the lower cabinets;
- Lower-mounted upper cabinets with handles within reach of a person in a wheelchair;
- Roll-under bathroom and kitchen sinks;
- Lower-mounted mirrors/medicine cabinets; and
- Audio/visual alert doorbells; Braille characters included to the left on all interior common area signage.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- Nonprofit set-aside (10%);
- Indian Reservation set-aside (1 project); and
- New Development/Preservation Parity.



State HFA homepage | Ohio Housing Finance Agency, <https://ohiohome.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

New Affordability: Senior Urban Housing.
Allocation amount = \$3,000,000.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- For Senior projects, 1 point will be awarded for developments located within a 1-mile linear distance to a senior center.
- Sub-Pool Priorities: Senior Urban Housing, Maximum Points: 40.

Scoring Criterion	Max Points	Definition of Category
Transportation	5	Developments that have access to transportation services that are provided in close proximity to the development and on a regular frequency. Transportation services must be one of the following: a. Public Transit: Development is located in a census tract with a score of at least 1 on the Center for Neighborhood Technology's Transportation Connectivity Index. b. Development-provided transportation: Transportation services are provided by the development (funded by development or partner organization) at no charge to the residents, and available to residents at least five times per week. c. On-Demand Service: Transportation is available to residents on an on-demand basis, coordinated by the property, and provided at no charge or reduced charge for residents.
Aging Population	5	Development is located in one of the below areas: a. A county where the share of population aged 55 and older is projected to be 20% or greater by 2030; or b. A county where the projected change in population aged 55 and over from 2017- 2030 is 5% or greater.

Scoring Criterion	Max Points	Definition of Category
Proximity to Amenities	10	<ul style="list-style-type: none"> • Full service supermarket with fresh produce (2 points) • Restaurant or café • Pharmacy or medical clinic • Public recreation center • Public park • Public library • Cultural facility • Church or religious institution • Senior Center
Inclusive Tenant Selection Plan	5	Developments that commit to furthering Fair Housing by adopting screening criteria that provides second chances to formerly incarcerated individuals. Owner will adopt admission policies that achieve a sensible and effective balance between allowing individuals with a criminal record to access LIHTC housing while ensuring the safety of all residents of such housing.
Experienced Service Provider	15	Developments demonstrating a commitment by an experienced local or regional service provider(s) to deliver comprehensive services specific to the population of the proposed development for the duration of the compliance period. All service providers must have a history of serving the targeted area and/or population and be located on-site, contiguous or accessible to the development. Developments seeking points in this category must also have a service coordinator onsite at least 15 minutes per unit per week.

Sub Pool Priority — Non Urban Housing, Senior: Aging Population.

- Development is located in one of the below areas: a. A county where the share of population aged 55 and older is projected to be 20% or greater by 2030; or b. A county where the projected change in population aged 55 and over from 2017–2030 is 5% or greater. Submission: Applicants must submit evidence that the development is sited within an eligible county to earn points for this criterion. A map specific to this criterion will be made available on the OHFA website.

» Scoring:

- ◇ Projected share: 2 points for 20% to 25%; 3 points for >25% to 30%; 4 points for >30% to 35%; 5 points for >35%.
- ◇ Projected change: 2 points for 5% to 10%; 3 points for >10% to 15%; 4 points for >15% to 20%; 5 points for >20%.

Senior: Experienced Service Provider.

- 5 points for developments demonstrating a commitment by an experienced local or regional service provider(s) to deliver comprehensive services specific to the population of the proposed development for the duration of the compliance period. All service providers must have a history of serving the targeted area and/

or population and be located on-site, contiguous or accessible to the development. Developments seeking points in this category must also have a service coordinator onsite at least 15 minutes per unit per week.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

All developments shall provide service coordination to the resident population and linkages to information and resources appropriate to the population. The application shall include evidence of salaried or in-kind service coordination on-site, contiguous, or accessible to the development. All service coordinators shall have a history of serving the targeted area or population. OHFA recommends service providers post hours of operation and maintain a physical presence in a visible location at the development.

1 point will be awarded for developments located within a 1-mile linear distance to positive land uses and amenities such as:

- Full service supermarket with fresh produce (2 points);
- Restaurant or café;
- Pharmacy or medical clinic;
- Public recreation center;
- Public park;
- Public library;
- Cultural facility;
- Church or religious institution; and
- Service Enriched Housing.

Scoring Criterion	Max Points	Definition of Category
Local Service Providers	20	Proposals demonstrating a commitment by an experienced local or regional service provider(s) to deliver comprehensive services specific to the population of the proposed development. All service providers must have a history of serving the targeted area and/or population and be located on-site, contiguous or accessible to the development.
Local Partners	15	Proposals including both of the following: <ul style="list-style-type: none"> • Referral Partnership. The development team has established an MOU with either the applicable (1) Continuum of Care for PSH applicants or (2) ADAMH Board for Substance Abuse Recovery applicants to admit referrals from a coordinated entry system and will target households including individuals and families meeting the applicable target population; and • Medicaid Partnership. The development team can evidence partnership with a service provider who will coordinate provision of Medicaid-funded services.
Expert Recommendations	20	Proposals that have been designated a primary or secondary priority/ recommendation by the applicable Continuum of Care (CoC) for PSH applicants, or ADAMH Services Board for Substance Abuse Recovery applicants.
Neighborhood Development and Impact Initiative	20	
Accessible Design	10	Universal Design. Developments that incorporate a minimum number of Universal Design components, as outlined in Appendix D.
Sub-Pool Priority PSH	5	High Need County. Developments that are located in a county with a high number of literally homeless individuals as determined by HUD's 2018 Point in Time (PIT) count. A map specific to this criterion will be made available on OHFA's website.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- New Affordability: Urban Opportunity Housing \$4,500,000;
- New Affordability: General Occupancy Urban Housing \$3,000;
- New Affordability: Non-Urban Housing \$6,000,000;
- Preserved Affordability: HUD Subsidy Preservation \$3,500,000;
- Preserved Affordability: USDA Subsidy Preservation \$2,000,000;
- Service Enriched Housing: Permanent Supportive Housing \$4,250,000;
- Service Enriched Housing: Substance Abuse Recovery \$750,000; and
- Single Family Development \$1,000,000.

Oklahoma | 2018 QAP



State HFA homepage | Oklahoma Housing Finance Agency, <https://www.ok.gov/ohfa>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the Federal Fair Housing Act directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- This state does not award points for certain features in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Tenant Targeted Incentives: 5 points if applicant dedicates at least a minimum 10% of the total residential units for Targeted Populations. Elderly cannot be the 10% population.

- 8 points for Elderly Developments, as defined in OHFA's Chapter 36 Rules, can qualify only if additionally targeting 10% of their units to a Target Population.

OTHER PRIORITIES

This state prioritizes other types of development through these set-asides:

- Nonprofit set-aside (15%);
- New Construction (55%); and
- Rehabilitation (30%).



State HFA homepage | Oregon Housing and Community Services,
<https://www.oregon.gov/OHCS/pages/index.aspx>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- This state does not award points for certain features in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

- Up to 4 points for including targeting of special needs populations (broadly defined) in 10% to 25% or more of the total affordable units.
- 1 point in rural for access to Parks & Public Space.
- 1 point in Urban Areas for being in a TOD or being within ¼ mile of fixed transit stop.
- 1 point in Rural Areas for access to transit options.
- 1 point in Urban Areas, and up to 2 points in Rural Areas, for comprehensive Resident Services Plan submitted; scaled needs to the target population.
- 1 point for funding resident service staff or resources for referral agency.
- Up to 5 points, scaled scoring, for the percentage of the Project occupied by vulnerable population (frail elderly, disabled, large families, special needs populations, service dependent) who would face hardships from relocation. (For preservation developments only.)

OTHER PRIORITIES

This state prioritizes other types of development through these set-asides:

- Nonprofit;
- Preservation (25%): defined as Projects with at least 25% of the residential units have federal Project-based rent subsidies AND the HUD Section 8 contract is expiring or the USDA Rural Development (RD) loan is maturing within 7 years, or RD restrictive use covenants have expired. OR Projects with public housing units undergoing a preservation transaction involving a comprehensive recapitalization. (Note: for scattered site Projects with multiple locations, the 25% is calculated from all units in the transaction);
- Tribal Lands Set-Aside 10% Defined as being an application sponsored by tribal governments, tribally designated housing entities or tribal corporate entities on tribal trust land. If this set-aside is not fully utilized, the balance of resources will revert to the Preservation Project Set-Aside; and
- Regional Pool Set-Aside (65%).



State HFA homepage | Pennsylvania Housing Finance Agency, <https://www.phfa.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides a definition with alternate requirements to those within the Fair Housing Act.

- Senior occupancy (ages 62 and over).

SET-ASIDES

Senior/elderly: Senior Occupancy 62+ with Services. The Agency will reserve Tax Credits to, at a minimum, 2 senior occupancy developments targeting persons 62 years of age and above in each Pool. Eligibility for this preference will require demonstration that services will be provided to residents to enable them to continue to live independently.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- Designated Populations & Supportive Services — To receive points in this category, the development will provide evidence that appropriate services will be provided for the entire resident population for the duration of the compliance period. Evidence consists of a supportive services plan that:

- » Senior occupancy developments should deliver or coordinate services that: stabilize occupancy by improving residents' ability to uphold their lease obligations throughout the aging process and enhance quality of life through improved access to services and benefits, health promotion, community building, and socialization.
- » Utilizes a service provider/coordinator with the capacity to implement described plan of services. The recommended minimum is one hour of on-site dedicated staffing per week for every five units. Services staff should have access to a computer with Internet and email capabilities. There should be sufficient space to carry out the described services, including adequate office and community space.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Transit-Oriented Design:

- The Agency may award 2 points to developments located within ½ mile of a completed or planned public transportation fixed route stop.

Walkability:

- The Agency may award up to 2 points for developments which have the following walk scores according to www.walkscore.com (for scattered site projects, a walk score will be obtained for each site and a weighted average based upon number of units at each site will be calculated).

Accessible Units:

- 10 points may be awarded to developments where the developer agrees to provide twice as many fully accessible units as are otherwise required (under local, state, or federal mandate, whichever is greater) in the development. All employee units and market rate units must be included in the total unit count when calculating the required number of accessible units. The developer must certify that these units are

accessible and that, during initial lease up, the developer will exclusively reserve the units for occupancy by persons needing the accessible units for the first thirty days. Thereafter, the developer will include certain provisions in the lease to allow the units to be occupied by persons who need the accessible features of the units, to the greatest extent feasible. Evidence of enforcement of the lease provisions will be required and implementation and adherence to additional outreach programs to identify and match qualified residents who need the accessible features within the development may be required throughout the compliance period which may include contacting the Agency prior to renting the unit to persons who do not require the accessible features in accordance with the Agency's Accessible Unit Policy.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- Urban Pool;
- Non Urban pool; and
- Nonprofit Developer at least 25%.

Within the above pools, PHFA has made the following reservations:

- General Occupancy - The Agency will reserve Tax Credits to, at a minimum, 3 general occupancy properties in each Pool.
- Preservation Developments — The Agency will reserve Tax Credits to, at a minimum, 4 preservation properties in the aggregate between the two Pools.
- Supportive Housing — The Agency will reserve Tax Credits to, at a minimum, 2 developments in each Pool which promote supportive housing opportunities.
- Innovation in Design — The Agency will hold a juried competition encouraging demonstrated innovation in housing which may be illustrated

through excellence in design, implementation of current and future energy efficient technologies and materials and leveraging community and capital resources and will reserve Tax Credits to the winning development(s).

- Strategic Investment — The Agency will reserve Tax Credits to, at a minimum, 3 Applicants in each Pool which the Agency determines support specific housing economic opportunities (such as areas of housing shortage due to Marcellus Shale, urgent community needs or other unusual economic development pressures) or the overall housing goals of the Commonwealth, as determined by the Agency.
- Community Revitalization/Mixed Income (Urban Pool only) — The Agency will reserve Tax Credits to, at a minimum, 3 developments which support a broader community revitalization program which has the capability of changing fundamentally the character of a neighborhood, enhancing the lives and amenities available to residents of the community, is focused on implementing a “mixed income” strategy, and/

or which seeks to counteract the pattern through which some metropolitan areas are being segregated by income or race.

- Areas of Opportunity (Suburban/Rural Pool only) — The Agency will reserve Tax Credits to, at a minimum, 3 developments which expand housing opportunities and design choices in areas suitable for long-term economic growth with an existing or planned infrastructure to

support future growth in the area, in order to promote mixed-use and/or mixed-income development within a community setting. These developments will be located in areas of strong schools and employment opportunities and in communities which may have not received representative resources in the past.



State HFA homepage | Rhode Island Housing, <http://www.rihousing.com/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- This state does not award points for certain features in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

- Points for if development will be located within ½ mile of RIPTA or MBTA public transit service. Alternatively, development has access to no or low cost transportation services available to all resident which can be documented with a letter or agreement with the provider.
- Points for if development incorporates space for the co-location of supportive services to residents.
- Points for development that incorporates outdoor green space and community space.

OTHER PRIORITIES

This state has identified the following priorities:

- Because of the limited amount of available subsidies, including the capital subsidy from the housing credit, priority will be given to developments which can viably and effectively serve:
 - » Very low income households;
 - » Individuals and families who have experienced chronic homelessness; and
 - » Individuals with special needs.

South Carolina | 2020 QAP



State HFA homepage | South Carolina State Housing Finance and Development Authority,
<https://www.schousing.com/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides a definition with alternate requirements to those within the Fair Housing Act.

- Elderly Household means a household whose head, spouse, or sole member is a person who is at least 62 years of age; or two or more persons who are at least 62 years of age living together; or one or more persons who are at least 62 years of age living with one or more live-in aides.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- Up to 5 points for projects targeting (a) families located in a high-performing school district and (b) targeting older persons located in a county with quality healthcare available.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

- Up to 5 points (a) in Group A counties based on proximity to transit and (b) land-based (i.e., non-satellite) internet connectivity speed in Groups B and C. In Group A counties, the Authority will use the AllTransit™ Performance Score tool built by the Center for Neighborhood Technology.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- High demand new construction (45% to 50%);
- High demand rehabilitation (10% to 15%);
- General new construction (10% to 15%); and
- General rehabilitation (5% to 10%).



South Dakota | 2018–2019 QAP

State HFA homepage | South Dakota Housing Development Authority, <https://www.sdhda.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving designated populations, including seniors.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Multifamily rental housing projects:

- Containing 5 or more dwelling units must include 5% of the total units (1 unit minimum) for individuals with mobility impairments and 2% of the total units (1 unit minimum) for individuals with sensory impairments (i.e., hearing or vision impairments). The above unit requirements may NOT be consolidated so as to provide only 1 unit.
- Up to 15 points will be awarded for projects that create additional accessible units for individuals with mobility and or sensory impairments. A minimum of 1 additional unit must be added above the federal minimum requirements. Accessible units may not all be located in 1 building of a multi-building project and should be evenly distributed among the buildings.

Points	Total % of Accessible Units
5	5% to 10%
10	10.01% to 15%
15	15.01% to 20%

Projects located in close proximity of community services and areas of opportunity will be eligible for up to 40 points. 5 points will be awarded for each category item. Close proximity will be defined as within one half mile of the property.

- Grocery/Retail Stores;
- Hospital/Medical Clinics;
- Schools/Senior Center (as applicable); and
- Special Service Offices.

15 points for incorporation of the 7 Universal Design Principles in at least 25% of all units or single-family

developments with accessible routes into and through the home including zero step entry, not including Section 504 units. Universal design is the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design. Minimum universal design principals can be found on the SDHDA website.

35 points for multi-family projects that have either a stand-alone Community Building or a Community Room.

Tennessee | 2019–2020 QAP



State HFA homepage | Tennessee Housing Development Agency, <https://thda.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

Special Housing Needs:

- Housing needs served by housing that has been constructed or rehabilitated with special features (e.g., location, design, layout, or on-site services) to help people live at the highest level of independence in the community. For example, the unit may be adapted to accommodate special physical or medical needs; or provide on-site services such as staff support for the elderly, individuals with mental health issues, developmental, or other social needs.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- 5 points for serving Resident Populations with Special Housing Needs: Proposed developments which select these points will provide a residency preference for households with Special Housing Needs. All facilities must be ADA Compliant. The development shall meet all Fair Housing Act requirements that all public

and common areas be readily accessible to and usable by persons with disabilities. A development shall contain dedicated space with appropriate furniture and fixtures for, and agreements with, providers of Supportive Services relevant to Special Housing Needs residents and at least 1 of the following on-site amenities:

- » Construct and/or rehabilitate an exercise facility for appropriate group activity for special housing needs residents. The space must be at least 900 square feet, if indoor; or
- » Construct and/or rehabilitate a gazebo containing a minimum of 100 square feet; which must be covered and have permanent bench seating affixed and in an appropriate location available to all residents for year round usage; or
- » Construct and/or rehabilitate a pergola sized a minimum of 14 feet by 14 feet; which must have permanent bench seating affixed and in an appropriate location available to all residents for year round usage;
- » Construct and/or rehabilitate a veranda which must be permanently attached to the side of a building. The veranda must be covered by a roof, be 10 feet wide and extend the length of the attached side of the building. The veranda must contain permanent seating for 10 percent of the units at the development and be available to all residents for year round usage;

- » Construct and/or rehabilitate a picnic shelter which must be covered, with permanent table and bench seating, be ADA Compliant and in an appropriate location available to all residents for year round usage;
- » Provide in the proposed development's community room or computer room updated computer systems equipped with high speed Internet service, which include new computers, new printers and new scanners manufactured within the most recent 12 months as of the placed in service date. The computers should be provided at a minimum of one (1) computer per 50 total units or part of 50 units. Printer cartridges, paper, computer supplies and on-going maintenance of the computer systems sufficient to meet reasonable resident demand will be furnished by the development owner. The computer system must be available to residents during regular office hours and occasionally during the evenings and weekends.
- » Points may not be taken for Serving Resident Populations with Special Housing Needs and Serving Resident Populations with Children. Applicants must choose whether to select points for Serving Resident Populations with Special Housing Needs or Serving Resident Populations with Children, but not both.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving designated populations, including seniors.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

- 6 points for providing a minimum 1200 square foot community building accessible to residents during reasonable hours; including evenings, holidays, and weekends.
 - » The square footage counted towards this total may include a leasing office, an equipped exercise room, and an equipped computer center. Laundry room and storage/ maintenance rooms will not be counted as part of the 1200 square foot minimum.
- 2 points for construction and maintenance of a walking trail, minimum 4 feet wide and 1,250 linear feet paved and continuous. At least 1 permanently anchored weather resistant bench with a back must be installed at the mid-point of the trail. Sidewalks are not eligible for these points.
- 5 points for serving Resident Populations with Special Housing Needs.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- Nonprofit Set-Aside;
- CNI Grants;
- Innovation Round;
- PHA Set-Aside;
- Existing Multifamily Housing; and
- New Construction.



Texas | 2020 QAP

State HFA homepage | Texas Department of Housing & Community Affairs,
<http://www.tdhca.state.tx.us/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving designated populations, including seniors.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Points for Community Space for Resident Supportive Services:

- 1 point for accessible walking/jogging path, equivalent to the perimeter of the Development or a length that reasonably achieves the same result, separate from a sidewalk and in addition to required accessible routes to Units or other amenities;
- 2 points for furnished Community room;
- 1 point for library with an accessible sitting area (separate from the community room);
- 3.5 points for shuttle service, at least three days a week, to a grocery store and pharmacy and/or a major, big-box retailer that includes a grocery store and pharmacy, OR a daily shuttle, during the school year, to and from nearby schools not served by a school bus system for children who live at the Development; and
- 1 point for monthly transportation to community/social events such as mall trips, community theatre, bowling, organized tours, and other activities.

- Health supportive Services:
 - » 2 points for food pantry consisting of an assortment of non-perishable food items and common household items (i.e., laundry detergent, toiletries, etc.) accessible to residents at least on a monthly basis or upon request by a resident. While it is possible that transportation may be provided to a local food bank to meet the requirement of this resident service, the resident must not be required to pay for the items they receive at the food bank;
 - » 1 point for annual health fair provided by a health care professional;
 - » 2 points for weekly exercise classes (offered at times when most residents would be likely to attend);
 - » 2 points for a contracted onsite occupational or physical therapy services for Elderly Developments or Developments where the service is provided for Persons with Disabilities and documentation to that effect can be provided for monitoring purposes; and
 - » 2 points for a part-time resident services coordinator with a dedicated office space at the Development or a contract with a third-party to provide the equivalent of 15 hours or more of weekly resident supportive services at the Development.

OTHER PRIORITIES

This state prioritizes other types of development through these set-asides:

- Nonprofit: Nonprofit Set-Aside. (§2306.6729 and §2306.6706(b)) At least 10% of the State Housing Credit Ceiling for each calendar year shall be allocated to Qualified Nonprofit Developments which meet the requirements of Code, §42(h)(5) and Tex. Gov't Code §2306.6729 and §2306.6706(b). Qualified Nonprofit Organizations must have the controlling interest in the Development Owner applying for this Set-aside (i.e., greater than 50% ownership in the General Partner). If the Application is filed on behalf of a limited partnership, the Qualified Nonprofit Organization must be the Managing General Partner. If the Application is filed on behalf of a limited liability company, the Qualified Nonprofit Organization must be the controlling Managing Member. Additionally, for Qualified Nonprofit Development in the Nonprofit Set-aside the nonprofit entity or its nonprofit Affiliate or subsidiary must be the Developer or a co-Developer as evidenced in the development agreement. An Applicant that meets the requirements to be in the Qualified Nonprofit Set-aside is deemed to be applying under that Set-aside unless their Application specifically includes an affirmative election to not be treated under that Set-aside and a certification that they do not expect to receive a benefit in the allocation of tax credits as a result of being affiliated with a nonprofit. The Department reserves the right to request a change in this election and/or not recommend credits for those unwilling to change elections if insufficient Applications in the Nonprofit Set-Aside are received. Applicants may not use different organizations to satisfy the state and federal requirements of the Set-aside.
- USDA (5%) USDA Set-Aside. (§2306.111(d-2)) At least 5% of the State Housing Credit Ceiling for each calendar year shall be allocated to Rural Developments which are financed through USDA. If an Application in this Set-aside involves Rehabilitation it will be attributed to and come from the At-Risk Development Set-aside; if an Application in this set-aside involves New Construction it will be attributed to and come from the applicable Uniform State Service Region and will compete within the applicable subregion unless the Application is receiving USDA Section 514 funding. Applications must also meet all requirements of Tex. Gov't Code §2306.111(d-2).

- » Eligibility of Certain Developments to Participate in the USDA or Rural Set-asides. (§2306.111 (d-4)) A proposed or Existing Residential Development that, before September 1, 2013, has been awarded or has received federal financial assistance provided under Section 514, 515, or 516 of the Housing Act of 1949 (42 U.S.C. Section 1484, 1485, or 1486) may be attributed to and come from the At-Risk Development Set-aside or the Uniform State Service Region in which the Development is located, regardless of whether the Development is located in a Rural Area.
- » All Applications that are eligible to participate under the USDA Set-aside will be considered Rural for all scoring items under this chapter. If a Property receiving USDA financing is unable to participate under the USDA Set-aside and it is located in an Urban subregion, it will be scored as Urban.
- At-Risk Set-Aside:
 - » At least 15% of the State Housing Credit Ceiling for each calendar year will be allocated under the At-Risk Development Set-aside and will be deducted from the State Housing Credit Ceiling prior to the application of the regional allocation formula required under §11.6 of this chapter (relating to Competitive HTC Allocation Process). Through this Set-aside, the Department, to the extent possible, shall allocate credits to Applications involving the preservation of Developments identified as At-Risk Developments. (§2306.6714) Up to 5% of the State Housing Credit Ceiling associated with this Set-aside may be given priority to Rehabilitation Developments under the USDA Set-aside.



State HFA homepage | Utah Housing Corporation, <https://utahhousingcorp.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Awards points for providing housing for older adults:

- Older Persons: Provide units for use by Older Persons (55 years or older) in accordance with the federal and Utah Fair Housing laws. Permanent Supportive Housing projects may not be age restricted. PSH Applications will not be awarded points under this category.
- 3 points for a minimum of 80% or more of the units in project must be age-restricted to 55 and older; or
- 5 points for 100% of the units in project must be age-restricted to 62 and older.

Award points for certain features in properties serving older adults:

- 1 point for Senior housing, within 1/2 mile of Senior center. Distance will be measured using the shortest walkable route along public access.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

- Points for location near transit.
- 2 points for development with computer room.
- 2 points for development with community room.
- 1 point for dedicated wellness room for visiting health care providers.
- Persons with mobility Impairments:
 - » All multifamily housing is required to construct a minimum of 5% of its dwelling units as fully accessible. No points are awarded for meeting this minimum requirement.
 - » Points are awarded for the number of units over and above the 5% requirement. For instance, if a project is required by the formula to have 4 fully accessible units and the Applicant provides 5 units, points will be awarded for the 1 excess unit. These units are to include accessible food preparation areas, bathrooms, bedrooms and living areas. 2 points per unit up to a maximum of 5 (10 total points maximum).

OTHER PRIORITIES

In addition to the incentives for senior affordable housing, above, the state prioritizes other types of development through these set-asides:

- Nonprofit (10%);
- Non-metro Areas and Small Project Set-Asides (20%);
- Permanent Supportive Housing Set-Aside (30%); and
- Government and Non-Profit Homeownership Set-Aside (5%).



State HFA homepage | Vermont Housing Finance Agency, <https://www.vhfa.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- Projects that are age-restricted for senior occupancy (and are of any market-appropriate unit size distribution) will receive one to three checkmarks, based on the robustness of the service package offered:
 - » Service-Enriched Housing (equivalent to the SASH model) will receive three checkmarks.
 - » Staff will evaluate all other service plans and will assign between one and three checkmarks accordingly.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Projects with Access to Public Transportation will receive two checkmarks.

Service Enriched Housing will receive three checkmarks.

- Service-Enriched Housing: A combination of housing and services intended to help residents to live healthier, stable, satisfying, and productive lives. Services provide the support and care residents need to maintain or improve their health and to live safely in the housing site. The best examples of Service Enriched Housing, such as the Vermont Blueprint for Health Support and Services at Home (SASH) program, address a range of health, social, and economic needs of residents. Service-Enriched Housing sites should meet the following criteria:
 - » Close to other community resources residents will need to access: food and other shopping, pharmacy, transportation, physician/medical services.
 - » Include common areas and residential units that support people with disabilities and

aging in place, including physical accessibility and Universal Design features.

- » Implement specific methods of serving residents with low incomes, disabilities, chronic health conditions, and/or frailty associated with aging.
- » Implement stable and predictable methods of providing services that address a range of needs in an individualized and flexible manner to support individual resident needs, either through site employees or agreements

with other entities. Common support services include meals, cooking assistance, cleaning, shopping assistance, personal care, social and recreational activities, and transportation.

- » Implement practices that build positive relationships with residents and other community agencies, and empower residents to direct their own lives through supportive decision-making.
- » Implement methods of improving access to health care and the health status of residents.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- Nonprofit; and
- Delayed project set-aside.



State HFA homepage | Virginia Housing, <https://www.vhda.com/Pages/Home.aspx>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- Any proposed elderly or family development located in a census tract that has:
 - » 30 points for less than a 3% poverty rate (based upon Census Bureau data);
 - » 25 points for less than a 10% poverty rate (based upon Census Bureau data); and
 - » 20 points for less than a 12% poverty rate (based upon Census Bureau data).

Award points for certain features in properties serving older adults:

- 1 point if all cooking ranges have front controls.
- 1 point if all bathrooms have an independent or supplemental heat source.
- 1 point if all entrance doors to each unit have two eye viewers, one at 42 inches and the other at standard height.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

- 5 points if a community/meeting room with a minimum of 749 square feet is provided.
- 15 points if units are constructed to include the Authority's universal design features, provided that the proposed development's architect is on the Authority's list of universal design certified architects. (15 points multiplied by the percentage of units meeting this requirement for non-elderly developments.)
- 10 points for any development located within ½ mile of an existing commuter rail, light rail, or subway station or ¼ mile of one or more existing public bus stops.
 - » If the development is located within the geographical area established by the executive director for a pool of credits for Northern Virginia or Tidewater Metropolitan Statistical Area, the development will receive 20 points if the development is ranked against other developments in such pools, 10 points if the development is ranked against other developments in any other pool of credits established by the executive director.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- Nonprofit (15%);
- Local Housing Authority (15%);
- New Construction (funded with 15% of the next year's Annual Credit Authority); and
- Geographic Pools.

Washington | 2020 QAP



State HFA homepage | Washington State Housing Finance Commission, <http://www.wshfc.org/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state references the federal Fair Housing Act directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- 10 points awarded to 100% Elderly developments.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties designated for older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

- 1 point for transit-oriented development if development is located within King County.
- 10 points for developments which provide a minimum 20% of the total housing units as Housing for Persons with Disabilities.

OTHER PRIORITIES

In addition to incentive for affordable senior housing, above, the state incentivizes other types of development through the following selection criteria:

- In determining housing priorities, the Commission will consider sponsor and project characteristics. The Commission will give weight to those projects which, among other things:
 - » Are located in areas of special need as demonstrated by location, population, income levels, availability of affordable housing and public housing waiting lists;
 - » Set aside units for special needs populations, such as large households, the elderly, the homeless and/or the disabled;
 - » Preserve federally assisted projects as low-income housing units;
 - » Rehabilitate buildings for residential use;
- » Include the use of existing housing as part of a community revitalization plan;
- » Have received written authorization to proceed as a United States Department of Agriculture – Rural Housing Service multifamily approved by the Commission;
- » New construction project;
- » Are historic properties;
- » Are located in targeted areas;
- » Leverage public resources;
- » The use of credits;
- » Demonstrate a readiness to proceed;
- » Serve tenant populations of individuals with children;
- » Are intended for eventual tenant ownership; and
- » Promote energy efficiency.

West Virginia | 2019–2020 QAP



State HFA homepage | West Virginia Housing Development Fund, <https://www.wvhdf.com/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides a definition with alternate requirements to those within the Fair Housing Act:

- Elderly: a person who is at least 62 years of age.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- Points are awarded for “Senior Potential Un-Met Housing Need”: (Maximum Points Available: 20

for New Supply or 10 for Existing Low-Income Housing). Points awarded as shown in the table below.

- An additional 5 points will be awarded to an Applicant that commits to target for occupancy the Elderly tenant population. The Elderly tenant population can only be targeted in elderly properties. For this section, an “elderly property” is defined as a property which (1) has or will have 80% of its units occupied by a head of household 55 years of age or older or (2) has or will have 100% of its units occupied by a head of household age 62 or older.

Points for New Supply	Points for Existing Low Income Housing	Senior-Targeted Property Located in a County Where Rank of Senior Potential Un-met Housing Need is Included In or Falls Between
1	0.5	51 and 55
2	1	46 and 50
3	1.5	41 and 45
4	2	36 and 40
5	2.5	31 and 35
6	3	26 and 30
7	3.5	21 and 25
8	4	16 and 20
10	5	11 and 15
15	7.5	6 and 10
20	10	1 and 5

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

- Points will be awarded to an Applicant which submits documentation evidencing that the property is located within 1/5 mile from a public transportation stop (e.g., bus stop, PRT station, bus route with “hail and ride” stops), or that a public transportation stop will be added within 1/5 mile in conjunction with the establishment of the New Supply housing or points will be awarded to an Applicant which submits documentation evidencing that the property will provide a form of transportation from and to the property that is comparable to or exceeding the service levels (e.g., accessibility, capacity, reliability, practicality, etc.) and scope of a typical fixed route public transportation system.
 - Points will be awarded to an Applicant that submits documentation describing, including frequency, the appropriate support services that will be provided and/or coordinated by a Non-Profit or by a Public Housing Authority or by a Governmental or Quasi-Governmental Entity for the residents of the property. In order to be considered support services for the purposes of awarding the points available, such support services may be available on a continual basis but must be available to tenants no less frequently than monthly (with the exception of the USDA Food and Nutrition Services Summer Food Service Program which is available during the summer months when school is not in session).
- 20 points will be awarded to an Applicant that commits to this criterion and submits documentation describing how the property will target for occupancy one or a combination of more than one of the Applicant-selected tenant populations listed below for at least 25% of the residential rental units in the property. The units in the property should be designed and suitable for the targeted occupancy populations. Tenant populations with special housing needs are as follows:
 - » Homeless: a person, family, or household who lacks a fixed, regular and adequate night time residence and has a primary night time residence which is (i) a supervised shelter, designed to provide temporary living accommodations; or (ii) an institution that provides a temporary residence for persons intended to be institutionalized; or (iii) a place not designed for or ordinarily used as a regular sleeping accommodation for human beings.
 - » Displaced: a person, family, or household displaced by a governmental action, or whose dwelling has been extensively damaged or destroyed as a result of a disaster declared or otherwise formally recognized under federal disaster relief laws.
 - » Elderly: a person who is at least 62 years of age.
 - » Handicapped: a person having a physical or mental impairment which substantially limits one or more major life activities; a person having a record of such an impairment; or a person being regarded as having such an impairment.
 - » Disabled: a person under a disability, as defined in Section 223 of the Social Security Act, or in Section 102 of the Developmental Disabilities Services and Facilities Construction Amendments of 1970, or in 24 CFR Part 891.

OTHER PRIORITIES

In addition to the incentives for affordable senior housing, above, this state prioritizes other types of development through these set-asides:

- Nonprofit (10%);
- Existing Low-Income Housing Preservation (34.5%);
- New Supply (53%); and
- Top off (projects which need additional credit) (2.5%).



State HFA homepage | Wisconsin Housing and Economic Development Authority,
<https://www.wheda.com/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state uses the same definition as the federal Fair Housing Act without referencing it directly.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- This state does not award specific points for providing affordable senior housing.

Award points for certain features in properties serving older adults:

- This state does not award specific points for features included in properties designated for older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

Access to services and amenities:

- Properties will receive points for proximity to key services and amenities including:
 - » Senior Center;
 - » Full service Medical Clinic or Hospital; and
 - » Public Park or hiking/biking trail.
- On site services and amenities
 - » Points for Community room dedicated for residents.
- Points for incorporating universal design features.
- Points for visitable units, only applicable to preservation/rehab.

OTHER PRIORITIES

This state promotes other types of development through these set-asides:

- Nonprofit (10%);
- Preservation (20%) preservation of qualifying federally assisted housing units. Applications must propose a minimum of 20% of eligible basis or \$20,000/unit in hard cost rehabilitation, whichever is greater, to qualify for this Set-Aside;
- Rural (15%) To qualify for the Rural Set-Aside, a development must be located in an area that meets USDA Rural Development's Property Eligibility criteria (for Multifamily Housing); and
- Supportive Housing (10%) developments intending to provide supportive services in at least 50% of the units for individuals and/or families who are chronically homeless or prone to homelessness and who require access to supportive services to maintain housing.



State HFA homepage | Wyoming Community Development Authority, <https://www.wyomingcda.com/>

PRIORITIES FOR OLDER ADULTS

DEFINITION

This state provides no definition of affordable senior housing, which, for the purposes of this report, we assume means they default to the definition within the Fair Housing Act.

SET-ASIDES

This state does not reserve Housing Credits specifically for older adults.

POINTS

Award points for providing housing for older adults:

- 10 points awarded for appropriate housing for need identified in Market Study (i.e., family, elderly, special needs).

Award points for certain features in properties designated for older adults:

- This state does not award specific points for features included in properties serving older adults.

BASIS BOOST

This state does not provide a basis boost for affordable senior housing.

POINTS FOR FEATURES AND AMENITIES THAT INDIRECTLY BENEFIT OLDER ADULTS

A project may receive up to 35 points for being within a proximity of 2 miles (1 mile for elderly) of appropriate services needed by the residents occupying the units (must list services and distance from project to be eligible to receive points):

- Including: Public transit, Doctor Offices, Senior Center, Hospital, Pharmacy and/or delivery, Library, walk/bike path.

In Senior Projects only, Community Rooms with a Kitchen and Bathroom are allowed an additional \$135,000 and Community Rooms without a Kitchen and Bathroom are allowed an additional \$52,000:

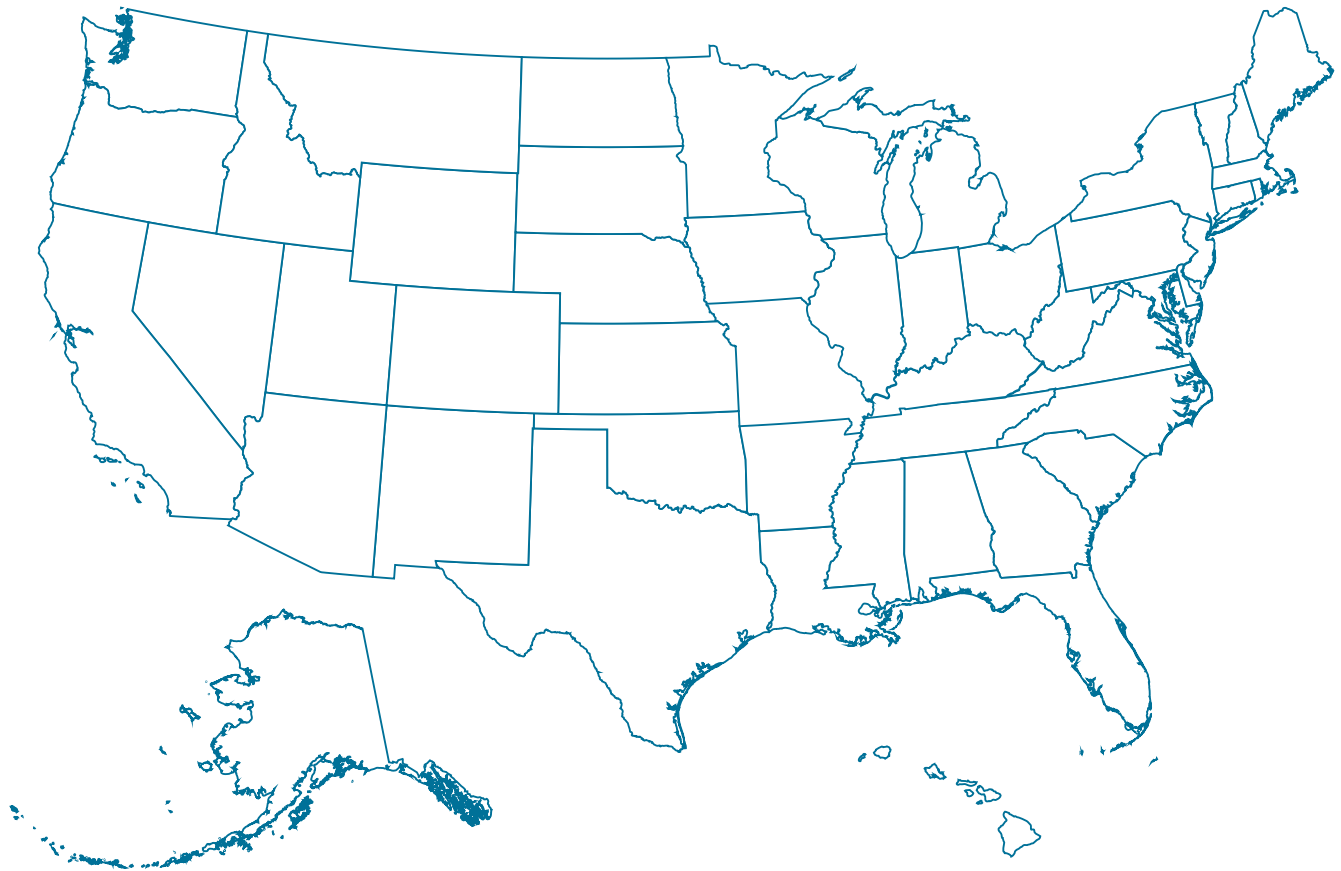
- The project is allowed the additional cost allowance only if the Community Room is made available to the tenants 24 hours every day and has a minimum 750 square feet.

OTHER PRIORITIES

This state prioritizes other types of development through these set-asides:

- Nonprofit (10%); and
- Acquisition/ Rehabilitation: Approximately 25% of the available funding is set aside for the acquisition and rehabilitation of existing

multifamily housing. To qualify for this set-aside no additional housing units may be added to the project. The Geographic Distribution scoring criteria does not apply to qualified projects applying for the Acquisition/Rehabilitation Set-Aside.



APPENDIX B

LINK TO STATE HFA HOMEPAGE

State	Link to State HFA Homepage
Alabama	https://www.ahfa.com/
Alaska	https://www.ahfc.us/
Arizona	https://housing.az.gov/general-public/arizona-housing-finance-authority
Arkansas	https://adfa.arkansas.gov/
California	https://www.treasurer.ca.gov/ctcac/tax.asp
Colorado	http://www.chfainfo.com/
Connecticut	https://www.chfa.org/
Delaware	http://www.destatehousing.com/
DC	https://dhcd.dc.gov/
Florida	https://www.floridahousing.org
Georgia	https://www.dca.ga.gov/
Hawaii	https://dbedt.hawaii.gov/hhfdc/
Idaho	https://www.idahohousing.com/
Illinois	https://www.ihda.org/
Indiana	https://www.in.gov/ihcda/
Iowa	https://www.iowafinance.com/
Kansas	https://kshousingcorp.org/
Kentucky	http://www.kyhousing.org/Pages/default.aspx
Louisiana	https://www.lhc.la.gov/
Maine	https://www.mainehousing.org/
Maryland	https://dhcd.maryland.gov/pages/default.aspx
Massachusetts	https://www.mass.gov/orgs/housing-and-community-development
Michigan	https://www.michigan.gov/mshda/
Minnesota	http://www.mnhousing.gov/sites/np/home
Mississippi	https://www.mshomecorp.com/
Missouri	http://www.mhdc.com/
Montana	https://housing.mt.gov/
Nebraska	https://www.nifa.org/
Nevada	https://housing.nv.gov/
New Hampshire	https://www.nhhfa.org/
New Jersey	https://www.nj.gov/dca/hmfa/
New Mexico	http://www.housingnm.org/
New York	https://hcr.ny.gov/multifamily
North Carolina	https://www.ahfa.com/
North Dakota	https://www.ndhfa.org/

State	Link to State HFA Homepage
Ohio	https://ohiohome.org/
Oklahoma	https://www.ok.gov/ohfa/
Oregon	https://www.oregon.gov/OHCS/pages/index.aspx
Pennsylvania	https://www.phfa.org/
Rhode Island	https://www.rihousing.com/
South Carolina	https://www.schousing.com/
South Dakota	https://www.sdhda.org/
Tennessee	https://thda.org/
Texas	http://www.tdhca.state.tx.us/
Utah	https://utahhousingcorp.org/
Vermont	https://www.vhfa.org/
Virginia	https://www.vhda.com/Pages/Home.aspx
Washington	http://www.wshfc.org/
West Virginia	https://www.wvhdf.com/
Wisconsin	https://www.wheda.com/
Wyoming	https://www.wyomingcda.com/

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