

Massachusetts Housing Partnership

Application for Chapter 40B Project Eligibility Letter ("PEL")

MHP requires the PEL applicant to complete the attached PEL Information Form and all required attachments as the key part of its application. Please return this PEL Information Form with a cover letter on your letterhead that contains the language on the next page and is signed by an authorized representative of the applicant. Please be sure to include MHP's application and 40B technical assistance fund fee with your completed application.

Section 1: GENERAL INFORMATION

1.a Project Information

Name of Proposed Project: _____

Municipality: _____

Site Address: _____

Zip Code: _____

Number of Dwelling Units: _____ Affordable Units _____ Market Units _____

Age Restricted?: Yes No If Yes, 55+, 60+ or 62+? _____

Project Type: New Construction Rehabilitation Both

Name of Proposed Development Entity (Applicant): _____

Entity Type: Limited Dividend Organization Non-Profit Public Agency

Has this entity already been formed? Yes No

Has the entity or principal individuals ever previously applied for permitting at the site for the Proposed Project? If yes, please see attachment 1.F. Yes No

1.b Applicant Information

Name: _____

Business Address: _____

Business Phone: _____

Business Fax No.: _____

Website Address: _____

1.c Principal Individuals

Principal Name #1: _____

Title: _____

Office Phone: _____

Cell Phone: _____

Email: _____

Principal Name #2: _____

Title: _____

Office Phone: _____

Cell Phone: _____

Email: _____

Principal Name #3: _____

Title: _____

Office Phone: _____

Cell Phone: _____

Email: _____

2. Development Team

2.a Project Architect

Name, Organization: _____
Address: _____
Phone: _____
Email: _____

2.b Project Engineer

Name, Organization: _____
Address: _____
Phone: _____
Email: _____

2.c Legal Counsel

Name, Organization: _____
Address: _____
Phone: _____
Email: _____

2.d Project Consultant

Name, Organization: _____
Address: _____
Phone: _____
Email: _____

2.e Proposed Management Entity

Name, Organization: _____
Address: _____
Phone: _____
Email: _____

2.f 40B Consultant

Name, Organization: _____
Address: _____
Phone: _____
Email: _____

2.f Other team member. Please describe role:

Name, Organization: _____
Address: _____
Phone: _____
Email: _____

Required Attachments

1.A Experience of Sponsor

Please attach separately a description of the experience of the Sponsor and the individuals representing the Sponsor in development projects like the project for which the PEL is being sought. Include any other relevant experience in housing development and management, real estate, and finance that you deem relevant to the qualifications of the Sponsor in connection with the subject project.

1.B Outline of Development Team

Please attach separately resumes for these individuals and companies. If any of the members of the development team are related to the Sponsor through common ownership, please so indicate on the attached list.

1.C Financial Disclosure Forms

We do not require financial statements from Sponsors for PELs, but you are welcome to provide them. We do, however, require you to complete and return the attached Financial Disclosure Forms as follows **Corporate Financial Disclosure Form** for each entity comprising the Sponsor and **Personal Financial Disclosure Form** for each principal owner of each entity comprising the Sponsor

1.D Fair Housing Experience

Please attach a description of your experience to date in marketing and renting housing units in keeping with state and federal fair housing standards. Please note your experience in preparing Affirmative Fair Housing Marketing and Resident Selection Plans (AFHMP), and in conducting outreach and performing resident selection procedures (including administering the lottery process, determining eligibility under applicable subsidy programs, and waitlist management) in accordance with these standards. Please also disclose whether the Sponsor has ever been charged with a violation of fair housing requirements.

Fair Housing Note: The guidelines promulgated by the Department of Housing and Community Development updated May 2013 (see attached) contain the following requirements of the development team with regard to the capacity to handle fair housing compliance:

Your development team, staff, other entity, or individual responsible for fair housing compliance have not required intervention by a state subsidizing agency to address fair housing complaints or concerns nor had a finding or final determination against it for violation of state or federal fair housing law within the past five (5) years;

•Your development team, staff, or other entity has successfully carried out similar AFHMP responsibilities for minimum of three (3) projects in Massachusetts, or the individual contracted to carry out the AFHMP tasks has successfully carried out similar responsibilities for a minimum of five (5) projects in Massachusetts; and

• Your development team, staff, or other entity has the capacity to address matters relating to limited English language proficiency (LEP). This includes language access planning and providing reasonable language assistance at no cost to the applicant, so that applicants with LEP may meaningfully apply and access the housing opportunity.

Additional Attachments (if applicable)

1.E Organizational Documentation Requirements for Nonprofit Sponsors

If the Sponsor is a non-profit organization, we require the following materials: a. The articles of organization for the organization; b. Evidence of good standing with the Public Charities Division of the Office of the State Attorney General; c. The conflict of interest policy for the organization; d. A disclosure of all related parties, and contracts or other arrangements involved with these related parties, which currently exist or are anticipated in connection with the project; e. A disclosure of all entities that are related to or affiliated with your organization by reason of common control, financial interdependence or other means.

1.F Prior Permitting Experience at Site

Please indicate if you have ever applied for permitting at the subject site, and been declined by the Town. If so, please explain how your proposal has been changed to address the Town's concerns.

1.G Additional Development Team Members

Please included name, organization, address, phone, and email contact information for additional development team members that did not fit in the space provided above.

Section 2: Site Condition and Information

Name of Proposed Project: _____

1.a Site Information

Municipality: _____

Street Address: _____

Zip Code: _____

Cross Street (if applicable): _____

1.b Brief Project Description (200 words or less):

1.c Existing Conditions

Buildable Area Calculations	Acres
Total Site Area	
Wetland Area (per MA DEP)	
Flood/ Hazard Area (per FEMA)	
Endangered Species Habitat (per MESA)	
Conservation/ Article 97 Land	
Protected Agricultural Land	
Other Non-Buildable	
Total Non-Buildable Area	
Total Buildable Site Area	
Total Impervious Areas	
Driveways, Parking, Sidewalks	
Building	
Total Open Areas/ Landscaped	
Undeveloped Open Area	
Landscaped Area	

Existing Utilities and Infrastructure	Yes/No	Description
Wastewater- private wastewater treatment		
Wastewater- public sewer		
Storm Sewer		
Water- public water		
Water- private well		
Natural Gas		
Electricity		
Roadway Access to Site		
Sidewalk Access to Site		
Other:		

1.d Surrounding Land Use and Amenities

Surrounding Land Use / Amenities	Distance from Site (mi.)	Available by Public Transportation?
Shopping facilities		
Schools		
Government Offices		
Multifamily Housing		
Public Safety Facilities		
Office/ Industrial Uses		
Conservation Land		
Recreational Facilities		
Houses of Worship		
Other:		

Please describe the surrounding land use:

1.e Zoning and Current Use

Site zoning district: _____

Please briefly describe known current use or prior use of site:

Single-family home located off a gravel driveway

Zoning Analysis	Zoning Requirements	Proposed Development
Minimum Area (ft.):		
Minimum Frontage(ft.):		
Maximum Gross Floor Area Ratio:		
Minimum Setbacks (ft.):		
Front Yard (ft.):		
Side Yard(ft.):		
Rear Yard (ft.):		
Minimum Lot Width (ft.):		
Maximum Height (ft.):		
Number of Stories:		
Minimum Number of Parking Spaces:		
Ratio of Parking Spaces to Housing Units:		

Please list and describe the local standards and zoning waivers requested. If needed, attach additional sheet (see attachments) :

1

2

3

4

5

6

Required Attachments

2.A Locus Map

Please provide a locus map and aerial photograph which identifies the site within the context of the Project's neighborhood.

2.B Tax Map

Please provide a copy of municipal tax map with subject parcels and parcel ID numbers clearly identified.

2.C Site Photographs

Please provide photographs of surrounding buildings and features that illustrate the physical context of the site. Site photos should include the pictures of the surrounding neighborhood as well.

2.D Site Plan

Site plan showing topography, existing building and proposed building footprints and paved areas for the Project, lot lines, existing and proposed roads and streets, wetlands and buffer zones, flood zones if any, or any other environmental constraints. This should include parcel map with neighboring lots with buildings shown and 1 full size site plan and at least 1 11"x 17" plan.

2.E Building Design

Drawings showing exterior elevations of the proposed buildings, illustrative rendering, typical floor plans, and unit plans.

Building designs should include 1 full size rendering and at least 3 11" x 17" plans.

2.F Project Narrative

Narrative description by the project architect describing the site and the project's approach to the massing of the building(s), the project's relationship to adjacent properties, and the proposed exterior building materials; this narrative must be supplemented by supporting visual information, such as the aerial geographical information available from Mass GIS, which provides visual evidence about the massing of existing structures surrounding the subject parcel. Project narrative must be either signed by the Project Architect or printed on Project Architect's letterhead.

2.G Tabular Zoning Analysis

Please provide a tabular zoning analysis of the site.

Additional Attachments (if applicable)

2.H Environmental Site Assessment

Any environmental site assessments that have been performed.

Section 3: Project Information

Name of Proposed Project: _____

Project Type: New Construction Rehabilitation Both

Age Restricted? Yes No If Yes, 55+, 60+ or 62+? _____

Dwelling Units per Acre: _____

Total Number of Dwelling Units: _____ Total Number of Affordable Units: _____

Total Number of Market Rate Units: _____ Total Affordable at _____% AMI: _____

Percentage of units with 3 or more bedrooms: _____ Total Affordable at _____% AMI: _____

Number of Handicap Accessible Units: _____ Total Affordable at _____% AMI: _____

Market Rate Accessible Units: _____ Total Affordable at _____% AMI: _____

Affordable Accessible Units: _____

Unit Mix: Affordable Units

Unit Type	Studio	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Number of Units:					
Number of Bathrooms:					
Square Feet per Unit:					

Unit Mix: Market Rate Units

Unit Type	Studio	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Number of Units:					
Number of Bathrooms:					
Square Feet per Unit:					

Section 4: Site Control

Name of Proposed Project: _____

1.a State regulations require a sponsor applying for a PEL to demonstrate site control. Please identify the form of control which the Sponsor has for the site of the Project.

Direct ownership by Sponsor

Ownership by affiliate

If so, please Identify the affiliate:

Offer to Purchase

Purchase and Sale Agreement

Other

Please describe:

We have executed a purchase and sale agreement with the current land owner.

Required Attachments

4.A Evidence of Site Control

Copies of all applicable, fully executed documents (deed, ground lease, purchase and sale agreement, option agreement, land disposition agreements, agreements to purchase easements) showing evidence of site control, including any required easements, along with copies of all amendments and extensions.

Section 5: Project Financials

Name of Proposed Project: _____

1.a Appraisal or Market Study

Have you engaged an appraisal or market study of the property? Yes No

NOTE: MHP is required under state regulations to engage, independently, an appraisal which values the property assuming the development rights in existence under current zoning prior to the issuance of a Comprehensive Permit. This appraisal will be subject to MHP's review and approval. If an appraisal has already been done, it may assist MHP or its appraiser in completing the required appraisal.

Please note that if the project is 20 units or less in size, MHP may waive this requirement if the Applicant provides a written request by the Chief Elected Official of the town or city in which the project is located. In substitution for the as-is appraisal MHP would require documentation supporting the acquisition cost; such documentation may be in the form of either a local tax assessment, a limited appraisal, or an opinion of value from a licensed real estate broker.

Required Attachments

5.A Market Rental Comparables

Please provide MHP with a listing of market rents being achieved in properties comparable to the Project.

5.B Development Budget

Please provide a detailed development budget showing the following: 1.) Sources of funds: first mortgage permanent loan, subsidy funds if any (please itemize each), equity from borrower or limited partners. If the construction-period financing has been identified, please indicate the intended construction lender and sources of funds expected during construction. 2.)Uses of funds: land acquisition, construction costs (broken down between sitework and building costs), and soft costs (identifying in detail the professional costs paid to third parties, the reserves proposed if any, the legal and closing costs, the financing costs, and the overhead and fees to be paid to the developer).

5.C Operating Budget

Please provide an operating budget, showing, upon completion, sources of operating revenue (broken down by rental income from each unit type, plus income from other sources), and operating costs (showing management fees, administrative costs, repair and maintenance costs, utility costs, taxes and insurance costs, and contributions to reserves if any

Additional Attachments (if applicable)

5.D Appraisal or Market Study

If you have engaged an appraisal or market study of the property, please provide it.

Section 6: Municipal Actions

Name of Proposed Project: _____

1.a Contact with Municipality

Have you contacted the Municipality regarding the proposed Project? Yes No

Please list the names and titles of employees or board members of the Municipality you have contacted:

Name	Title, phone number
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Please describe below the contact you have had to date with the Municipality regarding this project:

Please describe any actions you are aware of which the municipality has taken to promote the development of affordable housing.

Additional Attachments (if applicable)

6.A Additional Support for Proposed Project

Please attach any letters of support from the Town for the proposed Project

Section 7: Sustainable Development

Name of Proposed Project: _____

Please describe below any aspects of the Project which are in keeping with the ten Massachusetts Sustainable Development Principles

[Sustainable Development Principles](#)

DEVELOPER SELF-ASSESSMENT

(for consistency with the Sustainable Development Principles)

Method 1:

Check "X" Below

Yes No NA

Redevelop First

If Rehabilitation:

Check "X" below if applicable

- Rehabilitation/Redevelopment/Improvements to Structure
- Rehabilitation/Redevelopment/Improvements to Infrastructure

If New Construction:

- Contributes to revitalization of town center or neighborhood
- Walkable to:
 - (a) transit
 - (b) downtown or village center
 - (c) school
 - (d) library
 - (e) retail, services or employment center
- Located in municipally-approved growth center

Explanation **(Required)**

Optional - Demonstration of Municipal Support:

Check "X" below if applicable

- Letter of Support from the Chief Elected Official of the municipality*
- Housing development involves municipal funding
- Housing development involves land owned or donated by the municipality

*Other acceptable evidence: Zoning variance issued by ZBA for project; Minutes from Board of Selectman meeting showing that the project was discussed, approved, etc.

Explanation (Required)

Method 2: Development meets a minimum of **five (5)** of the Commonwealth's *Sustainable Development Principles*, as shown in the next section below.

If the development involves strong **municipal support** (evidence of such support must be submitted as an attachment), the development need only meet **four (4)** of the *Sustainable Development Principles*. However, one (1) of the Principles met must be **Protect Land and Ecosystems**.

Please explain at the end of each category how the development follows the relevant *Sustainable Development Principle(s)* and explain how the development demonstrates each of the checked "X" statements listed under the *Sustainable Development Principle(s)*.

Check "X" Below
Yes No NA

(1) Concentrate Development and Mix Uses

Support the revitalization of city and town centers and neighborhoods by promoting development that is compact, conserves land, protects historic resources, and integrates uses. Encourage remediation and reuse of existing sites, structures, and infrastructure rather than new construction in undeveloped areas. Create pedestrian friendly districts and neighborhoods that mix commercial, civic, cultural, educational, and recreational activities with open spaces and homes.

Check "X" below if applicable

- Higher density than surrounding area
- Mixes uses or adds new uses to an existing neighborhood
- Includes multi-family housing
- Utilizes existing water/sewer infrastructure
- Compact and/or clustered so as to preserve undeveloped land
- Reuse existing sites, structures, or infrastructure
- Pedestrian friendly
- Other (discuss below)

Explanation (Required)

Check "X" Below
Yes No NA

(2) Advance Equity & Make Efficient Decisions

Promote equitable sharing of the benefits and burdens of development. Provide technical and strategic support for inclusive community planning and decision making to ensure social, economic, and environmental justice. Ensure that the interests of future generations are not compromised by today's decisions. Promote development in accordance with smart growth and environmental stewardship.

Check "X" below if applicable

- Concerted public participation effort (beyond the minimally required public hearings)
- Streamlined permitting process, such as 40B or 40R
- Universal Design and/or visitability
- Creates affordable housing in middle to upper income area and/or meets regional need
- Creates affordable housing in high poverty area
- Promotes diversity and social equity and improves the neighborhood
- Includes environmental cleanup and/or neighborhood improvement in an Environmental Justice Community
- Other (discuss below)

Explanation **(Required)**

Check "X" Below

Yes No NA

(3) Protect Land and Ecosystems

Protect and restore environmentally sensitive lands, natural resources, agricultural lands, critical habitats, wetlands and water resources, and cultural and historic landscapes. Increase the quantity, quality and accessibility of open spaces and recreational opportunities.

Check "X" below if applicable

- Creation or preservation of open space or passive recreational facilities
- Protection of sensitive land, including prime agricultural land, critical habitats, and wetlands
- Environmental remediation or clean up
- Responds to state or federal mandate
- Eliminates or reduces neighborhood blight
- Addresses public health and safety risk
- Cultural or Historic landscape/existing neighborhood enhancement
- Other (discuss below)

Explanation **(Required)**

Check "X" Below

Yes No NA

(4) Use Natural Resources Wisely

Construct and promote developments, buildings, and infrastructure that conserve natural resources by reducing waste and pollution through efficient use of land, energy, water, and materials.

Check "X" below if applicable

- Uses alternative technologies for water and/or wastewater treatment
- Uses low impact development (LID) or other innovative techniques
- Other (discuss below)

Explanation **(Required)**

Check "X" Below

Yes No NA

(5) Expand Housing Opportunities

Support the construction and rehabilitation of homes to meet the needs of people of all abilities, income levels and household types. Build homes near jobs, transit, and where services are available. Foster the development of housing, particularly multifamily and single-family homes, in a way that is compatible with a community's character and vision and with providing new housing choices for people of all means.

Check "X" below if applicable

- Includes rental units, including for low/mod households
- Includes homeownership units, including for low/mod households
- Includes housing options for special needs and disabled population
- Expands the term of affordability
- Homes are near jobs, transit, and other services
- Other (discuss below)

Explanation **(Required)**

Check "X" Below

Yes No NA

(6) Provide Transportation Choice

Maintain and expand transportation options that maximize mobility, reduce congestion, conserve fuel and improve air quality. Prioritize rail, bus, boat, rapid and surface transit, shared-vehicle and shared-ride services, bicycling, and walking. Invest strategically in existing and new passenger and freight transportation infrastructure that supports sound economic development consistent with smart growth objectives.

Check "X" below if applicable

- Walkable to public transportation
- Reduces dependence on private automobiles (e.g., provides previously unavailable shared transportation, such as Zip Car or shuttle buses)
- Increased bike & ped access
- For rural areas, located in close proximity (i.e., approximately one mile) to a transportation corridor that provides access to employment centers, retail/commercial centers, civic or cultural destinations
- Other (discuss below)

Explanation (Required)

Check "X" Below

Yes No NA

(7) Increase Job and Business Opportunities

Attract businesses and jobs to locations near housing, infrastructure, and transportation options. Promote economic development in industry clusters. Expand access to education, training, and entrepreneurial opportunities. Support growth of local businesses, including sustainable natural resource-based businesses, such as agriculture, forestry, clean energy technology, and fisheries.

Check "X" below if applicable

- Permanent jobs
- Permanent jobs for low- or moderate-income persons
- Jobs near housing, service or transit
- Housing near an employment center
- Expand access to education, training, or entrepreneurial opportunities
- Support local businesses
- Support natural resource-based businesses
- Re-uses or recycles materials from a local or regional industry's waste stream
- Support manufacture of resource-efficient materials, such as recycled or low-toxicity materials
- Support businesses that utilize locally produced resources such as locally harvested wood or agricultural products
- Other (discuss below)



Explanation **(Required)**

Check "X" Below

Yes No NA

(8) Promote Clean Energy

Maximize energy efficiency and renewable energy opportunities. Support energy conservation strategies, local clean power generation, distributed generation technologies, and innovative industries. Reduce greenhouse gas emissions and consumption of fossil fuels.

Check "X" below if applicable

- Energy Star or equivalent*
- Uses renewable energy source, recycled and/or non-/low-toxic materials, exceeds the state energy code, is configured to optimize solar access, and/or otherwise results in waste reduction and conservation of resources
- Other (discuss below)

* All units are required by MassHousing to be Energy Star Efficient. Please include in your explanation a description of how the development will meet Energy Star criteria.

Explanation **(Required)**

Check "X" Below

Yes No NA

(9) Plan Regionally

Support the development and implementation of local and regional, state and interstate plans that have broad public support and are consistent with these principles. Foster development projects, land and water conservation, transportation and housing that have a regional or multi-community benefit. Consider the long-term costs and benefits to the Commonwealth.

Check "X" below if applicable

- Consistent with a municipally supported regional plan
- Addresses barriers identified in a Regional Analysis of Impediments to Fair Housing
- Measurable public benefit beyond the applicant community
- Other (discuss below)

Explanation **(Required)**

Additional Attachments (if applicable)**7.A Additional Support for Sustainable Development Principles**

Please provide any additional information for Project aspects which are in keeping with the ten Massachusetts Sustainable Development Principles which are not included in the space provided.

Section 8: Application Fee

For each Site Approval Application, please submit this form along with a check made out to :

**Massachusetts Housing Partnership
160 Federal Street
Boston, MA 02110**

1.a MHP Project Eligibility Processing fee

Developer Type:	For-profit	Non-profit
	\$2,000	\$1,500

1.b MHP 40B Technical Assistance Fund

Project Name: _____

Developer Name: _____

Municipality: _____

Number of Units: _____ x _____ per unit Subtotal _____

Base Fee amount: For-profit Developers- \$2,500 Public Agency, CDC, Non-profit Developers _____

Total 40B Technical Assistance fund Fee: _____

Required Attachments**8.A Application and 40B technical Assistance Fund fees**

Please remit payment of fees upon submitting this application.

Appendix 1. Attachment Checklist

Please use this checklist below to help ensure a complete application. Missing or incomplete applications may cause unnecessary delays in the processing of site approval. Thank you for your attention.

Required Attachments

- 1.A. Experience of Sponsor**
- 1.B. Outline of Development Team**
- 1.C. Financial Disclosure Forms**
- 1.D. Fair Housing Experience**
- 2.A Locus Map**
- 2.B Tax Map**
- 2.C Site Photographs**
- 2.D Site Plan**
- 2.E Building Designs**
- 2.F Project Narrative**
- 2.G Tabular Zoning Analysis**
- 4.A Evidence of Site Control**
- 5.A Market Rental Comparables**
- 5.B Operating Budget**
- 5.C Development Budget**
- 8.A MHP Application and 40B Technical Assistance Fee**

Additional Attachments (if applicable)

- 1.E. Documentation Requirements for Nonprofit Sponsors**
- 1.F. Prior Permitting Experience at Site**
- 2.H Environmental Site Assessment**
- 5.D Appraisal or Market Study**
- 6.A Letter of Support from Community**
- 7.A Additional Support for Sustainable Development Principals**