



HOME American Rescue Plan
Rental Housing Development
Application Procedures Manual for Gap Financing

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Introduction

The Texas Department of Housing and Community Affairs (TDHCA) was allocated approximately \$132 million in HOME American Rescue Plan (ARP) funds in a one-time allocation from the U.S. Department of Housing and Urban Development (HUD). HOME-ARP is based on HUD's HOME Investment Partnerships Program annual funding infrastructure. HOME-ARP also has significant differences compared to the HOME annual program.

TDHCA is releasing \$48,384,528 ~~46,511,887~~ in HOME-ARP funding for the development of affordable multifamily rental housing including funds for the HOME-ARP eligible portion of the property's capitalized operating cost expenses, and \$3,324,229 in nonprofit capacity building/nonprofit operating funds for eligible costs related to developing the capacity of nonprofit organizations to successfully carry out HOME-ARP eligible activities related to Rental housing. Applicants seeking gap financing under the HOME-ARP 2023-2 NOFA will be accepted from December 9, 2022 through January 31, 2023 (if sufficient funds remain).

Applicants for the 2023-2 HOME-ARP Rental Development NOFA will be required to submit an updated Uniform Multifamily (MF) Application, HOME-ARP Supplemental application and attachments. The availability and use of these funds are subject to the rules with several waivers listed in Appendix A of the HOME-ARP Rental NOFA. The rules and regulations include Texas Administrative Codes, Texas Government Codes, HUD's HOME Investment Partnerships Program Rule (24 CFR Part 92), HUD's Community Planning and Development (CPD) Notice 21-10 and Appendix, Fair Housing, and other federal requirements along with the HOME-ARP Allocation Plan.

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1. ELIGIBLE APPLICANTS

Applications under the HOME-ARP 2023-2 Rental Development NOFA will be accepted starting December 9, 2022, and the first Application Acceptance Date will be January 31, 2023, at 5:00pm Austin Local Time. The first Application Acceptance period will be for Developments that are only requesting HOME-ARP from TDHCA, or are requesting HOME-ARP layered with 2022 or 2023 4% HTCs, 2022 9% HTC, HOME annual, or National Housing Trust Fund (NHTF). NHTF Applicants are only eligible in the event that the per unit subsidy limit for NHTF would be exceeded with additional NHTF. Applications layered with 2020 or 2021 4% or 9% HTCs or 2023 9% HTCs are ineligible to apply during the first Application Acceptance Period.

Applications received on February 1, 2023, until March 1, 2023 will have the second Application Acceptance Date of March 1, 2023, at 5:00pm Austin Local Time. The second Application Acceptance period will be only for 2023 9% HTC Supportive Housing Applicants, if funding is available. Applicants under the second Application Acceptance Date should not use the HOME-ARP Gap Financing Applicants Manual; they should only use the HOME-ARP Supplemental Manual for New Applicants.

A choice-limiting action may not have occurred, except for site acquisition that was completed before the contemplation of federal funds, or except where the Application had prior environmental clearance prior to the choice limiting action under 24 CFR Part 50 or Part 58, and where the prior 24 CFR 50 or 58 “Responsible Entity” agrees in writing by the Application Acceptance Date, to make a determination of supplemental funding or perform a re-evaluation of the original review.

2. HOME-ARP REQUIREMENTS

HOME-ARP is based on HUD’s HOME Investment Partnerships Program, with significant differences as described in HUD CPD Notice 21-10 and Appendix: Waivers and Alternative Requirements for Implementation of the HOME-ARP Program. The Department reserves the right to amend the requirements of the 2023-2 HOME-ARP Rental Development NOFA based on further HUD guidance.

More information and guidance is available online at <https://www.tdhca.state.tx.us/home-arp/index.htm> in the HOME-ARP Handbook. The handbook includes information on layering of HOME-ARP with other funds, rent levels, reserves, and qualifying populations (QPs).

The Texas Administrative Code that applies to HOME-ARP are below.

- 10 TAC Chapter 1 (Administration)
- 10 TAC Chapter 2 (Enforcement)
- 10 TAC Chapter 10 (Uniform Multifamily Rules)
- 10 TAC Chapter 11 (Qualified Allocation Plan)
- 10 TAC Chapter 12 (Multifamily Housing Revenue Bond Rules)
- 10 TAC Chapter 13 (Multifamily Direct Loan Rule)

However, there are several waivers to the rules as listed in the HOME-ARP Rental NOFA. The HOME-ARP Rental NOFA is competitive. Applicant must complete a self-score along with supporting documentation. The scoring criteria is listed in the NOFA.

Items that apply only to 4% or 9% HTC do not apply to HOME-ARP. Therefore, the waivers listed in the NOFA and the list of tabs with exceptions only affect the criteria that would have applied to “All Programs” or “Direct Loan Applications Only.”

Applications will be processed by score and Application Acceptance Date. Applications with an Application Acceptance Date on or before January 31, 2023, will be reviewed and potentially awarded in order of high

score to low score. If funds are remaining after Applications received January 31, 2023 are submitted, Applications with Application Acceptance Dates between ~~January 31~~February 1, and March 1, 2023 will be reviewed and potentially awarded in order of high score to low score. Applicants may have only one active Application per Development at a time under this NOFA or other TDHCA NOFAs.

The minimum request per application for the HOME-ARP Rental is \$500,000, and maximum request per application is \$15,000,000 for the first Application ~~due date~~Acceptance Date and \$7,000,000 for the second Application ~~due date~~Acceptance Date.

There may be a master lease option for TDHCA's HOME-ARP. Applicants that would like to use the master lease option with a nonprofit sponsor listed in HUD CPD Notice 21-10 must request a waiver of 10 TAC §10.613(i) and 10 TAC §13.3(d)(2)(C) regarding the requirement to lease directly to residents. This waiver is not available to Developments with HOME annual funds, Tax Credit Assistance Repayment Funds, National Housing Trust Fund, or a property with HOME Match Units. In addition, Applicants should consider that TDHCA is still in the process of establishing processes and legal documents for the master lease option and a master lease option cannot be expedited. These will be expected to face delays and TDHCA encourages Applicants that need to close in an expedited fashion to seek another solution.

There are programmatic limitations on layering Units when a Development is funded by HOME-ARP and NHTF, or with HOME-ARP and other HOME funding or Tax Credits. Those limitations will be identified during the Department's program and underwriting review of the application. Generally a HOME-ARP Unit cannot be layered on NHTF Units that were committed as part of the proportionality test. In addition, HOME-ARP Units generally cannot be layered with a HOME Unit/HOME match Unit (from any Participating Jurisdiction) or a HOME ARP unit from another Participating Jurisdiction. Regarding layering with HOME annual, there may be limited exceptions where the number of HOME Units was determined because of scoring or for layering with HOME Match if HOME and HOME-ARP Units are greater than 50% of the total Units in the Development and there is more than one HOME Match Unit in the Development.

3. USING THE HOME-ARP RENTAL APPLICATION MANUAL

This manual is intended for gap financing Applicants. Gap financing Applicants are Applicants that already have an award with the Department for multifamily funding (9% Housing Tax Credit, 4% Housing Tax Credit, HOME, NHTF, or other multifamily direct loan funding) and are now submitting an application for HOME-ARP. The purpose of this manual is to provide a brief and general description of tabs in the Application, high level guidance as to the Department's submission requirements and what staff would generally view as acceptable supporting documentation.

All Applicants are required to follow the Multifamily Application Procedures Manual at <https://www.tdhca.state.tx.us/multifamily/apply-for-funds.htm>, as well as the directions for returning Applicants as defined below. At times, the directions in this HOME-ARP manual may add to the directions of the Multifamily Application Procedures Manual. It is recommended that an Applicant read the applicable parts of this Manual before completing or updating the tabs in the Uniform Multifamily Application.

Important – An Applicant should save a version of the existing most-recently submitted active application or most-recently approved Application to resubmit the required tabs identified in this manual.

4. ELECTRONIC APPLICATION

1. Applicants are required to include a full Uniform Multifamily Application. The updated Uniform Multifamily Application should be renamed as <HOME-ARP Development Name>.xls.
2. Applicants are also required to include the HOME-ARP Supplement with attachments available at <https://www.tdhca.state.tx.us/multifamily/special-initiatives.htm>. The HOME-ARP Supplement materials may be downloaded through the corresponding electronic application files. Right-click on <https://www.tdhca.state.tx.us/multifamily/special-initiatives.htm>, select “Save Target As” and choose the storage location on your computer. The Excel file should be named in the following format <HOME-ARP Supplement Development Name>.xls (e.g. HOME-ARP_Supplement Austin_Crossing.xls).

Important – Please do not use GoogleDocs or any other software that may affect the formulas in the excel cells. An unlocked version of the spreadsheet will be considered outside altered application materials not prescribed by TDHCA and will not be accepted. Also, do not transfer tabs from one Excel file to another, even if it is for the same Application.

3. Any cell that is highlighted yellow is available to be manipulated by the applicant. All other cells (unless specifically stated) are for Department use only, have been pre-formatted to automatically calculate information provided, and are locked. Applicants may view any formulas within the cells. Applicants may not add additional columns or rows to the spreadsheets, unless otherwise stated.
4. The electronic Application has been designed so that many of the calculations regarding development cost, and eligible basis will automatically compute once enough information has been entered. If you see a “#VALUE” or “DIV/0” in a cell, then these placeholder values should disappear after actual data is entered in other tabs.

If you have difficulty downloading files from the website, contact HOME-ARP Manager at (512) 475-4227, or Tiara.Hardaway@tdhca.state.tx.us.

5. ADDITIONAL INSTRUCTIONS FOR UNIFORM MF APPLICATION

The following Uniform MF Application tabs have supplemental instructions to incorporate HOME-ARP.

Applicants should use the most-recently approved awarded Application and update the tabs listed in this section. While Applicants are not required to complete a new Uniform MF Application, they must resubmit the entire Uniform MF Application with the updated tabs. Applications will be considered incomplete if the tabs below are not updated. For instruction on how the tab was originally completed, Applicants should refer to the Multifamily Uniform Application Procedures Manual at <https://www.tdhca.state.tx.us/multifamily/apply-for-funds.htm>.

Tab 17 – Development Narrative

There are four questions with additions in this section. Applicants should update the questions below and resubmit the tab with the HOME-ARP Rental Application.

Question 2: Target Population

Include requirements for HOME-ARP under “Development will receive other funding that has a requirement for a preference or limitation with regard to the population(s) served. If so, please explain in the box below.” If including a preference for HOME-ARP, make sure preferences is also listed in Tab 17.

If the Development is also a Supportive Housing Development, include HOME-ARP in the Certification for Supportive Housing under “Other target populations that are served by a federal or state housing program (provide documentation behind this tab).”

Question 4: Development Narrative

Update or include HOME-ARP in the development narrative (Question 4) such as details on how HOME-ARP is incorporated into the Development.

Question 6: Set-aside

Question 6 regarding set-asides for Multifamily Direct Loan funding does not apply to HOME-ARP.

Question 7: Previously Awarded State and Federal Funding

Applicant should include details of previous awards.

Indicate the date of submission at the bottom of the tab.

Tab 30 – Development Cost Schedule

If acquisition has been completed, please note as such in the Scratch Paper/Notes section. These costs are HOME-ARP ineligible.

Applicants will not be eligible for HOME-ARP rental development if there is a decrease in the deferred developer fee and/or increase to the total developer fee or eligible developer fee. The Total Developer Fee and Developer Fee included in Eligible Basis from the amounts in the published Real Estate Analysis report for the awarded HOME-ARP Rental Application must not increase. Applications for HOME-ARP may not reduce the Deferred Developer Fee from the amount included in the most recently published Real Estate Analysis report.

If the Applicant is requesting capitalized operating cost assistance (COCA), the COCA must be entered under Soft Costs in one of the lines shown as “Other (specify).” The Applicant must complete Tab 51. HARP COCA before entering COCA in the Soft Costs. The amount entered on Tab 30 should match the amount requested on Tab 51. As a reminder, COCA is optional.

Indicate the date of submission at the bottom of the tab.

Tab 31 – Financing Narrative and Schedule of Sources

If the Applicant requests optional COCA, the COCA must be entered as Debt. The Applicant must complete Tab 51. HARP COCA before entering COCA on Tab 31. Schedule of Sources. The amount of COCA requested should be entered as a “Permanent Loan.” The interest rate may be 0% deferred forgivable or 0.25% deferred payable, as further described in the NOFA. The COCA will be payable in full or forgiven upon the greater of fifteen years from the project completion, or the term of a HAP Contract layered on the property and reflected in the underwriting report. The Department will require that funds not expended during the Federal Affordability Period be returned to the Department in accordance HUD Notice 21-10, unless the Federal Affordability Period is being extended. If the Applicant selects a deferred

forgivable note and also has Housing Tax Credits awarded to the property, a letter from the equity partner(s) is required before award stating that the partner(s) has considered the tax implications of a deferred forgivable loan.

Make sure to include HOME-ARP in the Schedule of Sources under Financing Participants. HOME-ARP is not included on Tab 17 under Question 5, Funding Request. However, the HOME-ARP funding request is in the HOME-ARP Supplemental Application, and should still be included on Tab 31. The information included must be consistent with the financing narrative, term sheets, and development cost schedule.

The financing narrative and schedule of sources must reflect the increased costs that are the basis for the HOME-ARP application. The narrative should specifically point out what financing has changed since the application was last underwritten.

Indicate the date of submission at the bottom of the tab.

Tab 35 – Supporting Documentation

Tab 35 and certain supporting documentation are required for the HOME-ARP Rental Application. The required supporting documents include:

- Signed construction contracts or signed contractor bids, and schedule of values showing increased costs, and backup documentation – those costs should then be carried throughout the updated tabs.
- Evidence of other cost increases, such as insurance, etc.

If other supporting documentation for Summary Sources and Uses of Funds and Financing Narrative are updated, the Applicant must indicate so in their request for funding to HOME-ARP staff.

Tab 47 – Third Party Reports

Third party reports, if timely submitted with the Rental Application, are not required to be updated or resubmitted for HOME-ARP with two exceptions.

The required supporting documents are:

- Part 50 or Part 58 environmental clearance.
 - HOME-ARP Applicants without previous Part 50 or 58 environmental clearance, must submit their completed ~~Part 50 or Part 58 environmental review clearance~~ clearance ~~30~~ 90 days after the Application Acceptance date.
 - Part 50 or 58 will need a re-evaluation or supplemental funding clearance that reflect HOME-ARP funds from the jurisdiction that performed the original review.
 - HOME-ARP rental applicants that purchased the site before applying for HOME-ARP funding and do not have a previous Part 50 or 58 clearance must not start construction, until a Part 58 clearance has been issued. For more information, contact Tiara Hardaway at Tiara.Hardaway@tdhca.state.tx.us.
- Demonstration of current market demand for proposed project for QPs.
 - Market assessment for QPs is not required. However, the Applicant must demonstrate that unmet need among qualifying populations for the type of housing proposed through gap analysis, Continuum of Care data, public housing and affordable housing waiting lists,

point-in-time surveys, housing inventory count, or other relevant data on the need for permanent housing for the qualifying populations.

- **Scope and Cost Review (only applicable for Rehabilitation or Adaptive Reuse)**
 - If Davis Bacon Labor Standards now apply to the Development, the SCR may now need to reflect updated labor costs of the repairs, replacements and other rehabilitation/construction outlined in the form.
 - Applicants that include Rehabilitation or Adaptive Reuse activities must include a letter from the Original Application Scope and Cost Review provider certifying that the scope of the project has not changed from the Original Application; the Development Cost Schedule must be supported by either:
 - (A) Signed construction contracts or signed contractor bids, or
 - (B) An updated Scope and Cost Review Supplement.

If other third party documentation is updated, including the Market Analysis, Appraisal, or Feasibility Report, the Applicant must indicate so in their request for funding to HOME-ARP staff in Tab 57 of the HOME-ARP supplemental application.

6. TABS WITH POSSIBLE UPDATES

While not always required, there are tabs from the Uniform Multifamily Application that most likely will need to be updated for Applicants applying for HOME-ARP.

Tab 4. Direct Loan Cert. (Required for awardees with only HTC)

Applicants that applied for or received Housing Tax Credits should complete the certifications required behind Tab 4. Please note that these certifications are in addition to the certification required for HOME-ARP in the supplement.

Tab 5. Contact Info

If the Applicant has a change in the contact information for the HOME-ARP Application, complete Tab 5.

Indicate the date of submission at the bottom of the tab.

Tab 7. Site Info Part I (Required for awardees with only HTC)

If awardees only received HTCs and no direct loan funds or have no active applications for direct loan funds, then Question 8, Site & Neighborhood Standards, needs to be completed. Both boxes in this part must be checked if Applicant is undertaking New Construction.

Indicate the date of submission at the bottom of the tab.

Tab 8 – Site Info Part I Supporting Docs (Required for awardees with only HTC)

Only the updated supporting documents referenced in Tab 7 need to be resubmitted in Tab 8, including the supporting documents for the site and neighborhood standards, the evidence of transfer of title (if applicable) and potentially an updated Organizational Chart.

Tab 11 – Site Info Part III

If the Applicant has extended site control, this tab should be updated and submitted with the HOME-ARP Rental application. If the site was purchased, the cost of acquisitions will not be included as part of the project for HOME-ARP funds.

If the applicant purchased the site before applying for HOME-ARP funding and does not have a previous Part 50 or 58 clearance, the application is eligible, but the applicant must not start construction, until a Part 58 clearance has been issued.

Indicate the date of submission at the bottom of the tab.

Tab 12 – Site Info Part III Supporting Docs

Only the updated supporting documents referenced in Tab 11 need to be resubmitted in Tab 12.

Tab 20 – Existing Dev. Info (Required for awardees with only HTC)

Applicants that are HTC awardees only must complete Question 3, Lead Based Paint, on Tab 20.

Indicate the date of submission at the bottom of the tab.

Tab 21 – Occupied Devs

Applicants with only HTC awards may need to complete this section for HOME-ARP and attach the relevant documentation. If the Development is currently occupied, the Uniform Relocation Act (URA) applies and section 104d may also apply.

Tab 25 – Utility Allowances

This tab is only required if there are changes to the utility allowance requested in the rental application. Tab 25 for utility allowances cannot be updated to include the PHA utility allowance for returning Applicants for NHTF awardees unless a Development is all bills paid. Developments layered with HOME or HOME Match cannot update to include the PHA utility allowances.

More information about utility allowances can be found online at <http://www.tdhca.state.tx.us/pmcomp/utility-allowance.htm> and there will be an alternate requirement for HOME-ARP so that it can use the PHA utility allowance if there is no conflict with other funding sources or match provided.

Indicate the date of submission at the bottom of the tab.

Tab 28 – Offsite Cost Breakdown

While not required (and not generally an eligible HOME-ARP cost), Tab 28, Offsite Costs Breakdown, may be needed to support the updated costs in the development cost schedule and to demonstrate total Development cost increases that necessitate HOME-ARP investment.

Indicate the date of submission at the bottom of the tab.

Tab 29 – Site Work Costs Breakdown

While not required, Tab 29, Site Work Costs Breakdown, may be needed to support the updated costs in the development cost schedule and to demonstrate total Development cost increases that necessitate HOME-ARP investment.

Indicate the date of submission at the bottom of the tab.

TAB 35 - Supporting Documentation

Regarding the evidence to support the sources and uses tab, supporting documentation more than one

year old needs to be updated and resubmitted for schedule of sources.

Tab 44 – Experience Certificate (Required for Awardees with only HTC)

Not all the items need to be resubmitted under Tab 44. The two items that need to be updated are:
DUNS Number and System for Award Management (SAM.gov) registration

SAM registration for a Unique Entity Identifier Number (EIN) is required before receiving federal funds. Applicant should select that the evidence was submitted with the HOME-ARP Application or will be submitted upon award.

Davis Bacon Labor Standards.

If 12 or more Units are being requested under HOME-ARP, the first box should be checked.

Indicate the date of submission at the bottom of the tab.

7. HOME-ARP RENTAL SUPPLEMENT

The HOME-ARP Rental Supplement must be submitted with the Application. For more information about HOME-ARP requirements, see the guidance pages at <https://www.tdhca.state.tx.us/home-arp/index.htm>

Tab 49. HOME-ARP Specifics

Questions on this tab gather basic information from the applicant to be able to administer HOME-ARP if awarded, and correlate the most recently approved application.

Enter information in the yellow cells regarding:

- 1. Proposed Development Name.** Enter the development name.
- 2. HOME-ARP QP Referral Method**
 - 2a. Expanded CE Only: If using Coordinated Entry (CE) only, there are a series of questions to ensure that the CE meets the HOME-ARP requirements. The CE must encompass the entire primary market area, include all the QP household types, and expect to refer enough households to fill the HOME-ARP Units. In addition, the CoC lead entity would need to enter into a written agreement with TDHCA regarding the use of preferences. If no agreement can be reached between TDHCA and the CoC lead entity, by time of Contract, then another referral source must be used.
 - 2b. CE and Other Referrals: If using CE and other referral methods, list the CoCs expected to make the referrals and the names of other agencies that would be referring the households.
- 3. Preferences**
 - **Important:** All QPs will be eligible for the Units; the selection of preferences is not a limitation that excludes QPs.
 - Preferences listed in the application and approved by TDHCA will be formalized in the written agreement and in the Land Use Restriction Agreement.
 - Preference for persons referred through Coordinated Entry:
 - The preference “Persons Referred through Coordinated Entry” is not available for any HOME-ARP Units layered with HOME annual or NHTF. If

any HOME-ARP Units are layered with National Housing Trust Fund (NHTF) or HOME annual, then the preference “Persons Referred through Coordinated Entry” is not eligible for any HOME-ARP Units unless the Units are fixed.

- If using the referral method “Expanded CE Only,” the preference “Persons referred through Coordinated Entry” is duplicative and not required. If using CE and Other Referrals, the preference “Persons referred through Coordinated Entry” is not required.
- 3a. Other Preferences. If there is a preference required by another federal funding source, list the preference and attach documentation showing the preference requirement. 3b. Managing Preferences. If the Applicant wishes to apply some preferences to certain Units and not others, provide details on how the preferences will be applied. If more than one preference is selected, the Applicants should state if and describe how the preferences are ranked.

4. Attachments

- **HOME-ARP Certification (Required).**
 - Applicants should ensure that the appropriate HOME-ARP Certification is attached: Gap Financing (not the New Applicant Certification).
 - The Application Certification must be signed by the Applicant or person with authority to execute documents on the Applicant’s behalf and must be dated.
 - A specific acknowledgement exists for the Previous Participation form indicating that this form has not changed from the last time it was submitted to the Department, unless submitted with the HOME-ARP Rental application. In addition, the results of the Previous Participation Review, even if there is no change, may be different from the previous review. The Uniform Previous Participation Form for Multifamily and Ownership Transfers, with instructions, is available online at <https://www.tdhca.state.tx.us/pmcomp/forms.htm>.
 - The HOME-ARP Certification does not list every item required for the HOME-ARP Rental application. Additional documentation other than what is listed on this certification will be required according to this manual. This documentation includes, but is not limited to, the HOME-ARP Rental supplemental application, signed construction contracts or signed contractor bids showing increased costs, and any part of the most recently-approved application that has changed.
 - No hard copy of either certification is required, only a LEGIBLE scanned copy within the PDF file. The Applicant must, however, retain the originals and provide them to the Department on request.
 - A copy of the HOME-ARP Rental certification to execute is available online at <https://www.tdhca.state.tx.us/multifamily/special-initiatives.htm>.
 - The MF Certifications previously submitted with the most recently approved application also apply to HOME-ARP funds.
- **Direct Loan Unit Calculator (Required).**
 - Calculator is available online at <https://www.tdhca.state.tx.us/multifamily/apply-for-funds.htm>. Applicant

must submit a direct loan unit calculator tool, with Step 1 – Development Cost Schedule and Direct Loan Request Info, and Step 2 – Rent Schedule Info completed. **If Applicant has conducted acquisition or started construction, those costs cannot be included in the total development cost.** Please note the amount reflected on the calculator should represent HOME-ARP funds only.

- IMPORTANT: Requests for COCA must be reflected in Table 1. If the Applicant accurately updated Tab 30. Development Cost Schedule, then the COCA would already be included in the Total Development Cost from the Development Cost Schedule.
- Step 3 – Actual Max Per Unit Subsidy would only need to be completed if the Development was also requesting other MFDL funding from the Department (HOME ARP is not considered a federal funding source for NHTF subsidy layering purposes).
- Step 4 – Scoring Max Per Unit Subsidy would not need to be completed.
- **Preference required under another funding source (if applicable)**
- **Settlement Statement (if applicable)**

5. Additional Funding Sources

If applying for gap financing for development, list other funding sources that have either been applied and/or awaiting award.

6. Nonprofit Capacity Building (optional)

- Nonprofits organizations as part of the organizational structure for the Development may be eligible for nonprofit capacity building funds.
- The Development team may enter an amount requested for nonprofit capacity building each year for the first three years after award. The total amount of nonprofit capacity building funds combined with the optional request for nonprofit operating cost assistance funds should not exceed \$75,000 yearly.
- Per the NOFA: A nonprofit applicant must describe their approach to implementing the Capacity Building Assistance. A narrative must answer the questions: How will funds be used? How does the use of the funds in that way build capacity specific to HOME-ARP QPs?
- The narrative must also describe the uses of capacity building for each of the eligible capacity building activities, as listed in HUD CPD Notice 21-10:
 - A. Payroll. Salaries for new hires including wages and other employee compensation and benefits.
 - B. Training. Employee training or other staff development that enhances an employee's skill set and expertise.
 - C. Equipment. Computer software or programs that improve organizational processes, upgrades to materials, and supplies under \$5,000 combined over contract period (e.g., 1-3 years).
 - D. Technical Assistance/Consultants. Contracts for technical assistance or for consultants with expertise related to the HOME-ARP qualifying populations.

6a. Nonprofit Operating Cost Assistance (optional)

- Nonprofit organizations as part of the organizational structure for the

Development may be eligible for a grant of nonprofit operating cost assistance funds.

- The Development team may enter an amount requested for nonprofit operating cost assistance each year for the first three years after award. The total amount of nonprofit operating cost assistance funds combined with the optional request for nonprofit capacity building funds should not exceed \$75,000 yearly.
- Per the NOFA: The Nonprofit Operating Assistance will be available only to Supportive Housing Developers as defined in [10 TAC §11.1\(d\)\(126\)](#) or Qualified Nonprofits, as defined in [10 TAC §11.1\(d\)\(108\)](#). An Applicant will describe the need for Operating Cost Assistance. A narrative must answer the questions: How will funds be used? How does the use of the funds in that way support the nonprofit to build the rental development? The narrative must also describe the uses of nonprofit operating cost assistance for each of the eligible activities, as listed in HUD CPD Notice 21-10.
 - A. Payroll. Employee salaries, wages and other employee compensation and benefits.
 - B. Training. Employee education, training and travel.
 - C. Equipment. Equipment, materials, and supplies under \$5,000 combined over contract period (e.g., 1-3 years).
 - D. Operating/overhead. Rent, utilities, communication costs, taxes, and insurance.

7. Total HOME-ARP Request

- The total amount entered into Tab 49a, HARP Funding Request; Tab 49 Section 6b Total Nonprofit Capacity Building and Operating Cost Assistance; and Tab 52, COCA, will auto-populate the total HOME-ARP request. Total cannot exceed \$15,000,000.

Tab 49a. HARP Funding Request

- Construction Loans. The Applicant should complete the table based on the Applicants funding request. Only one type of loan should be selected.
 - **Construction to Permanent Loans:** All HOME-ARP Applicants structured as construction-to-permanent loans will reflect an interest rate of 0% during construction and as low as 0.25% for the permanent term (0.0% for Supportive Housing not layered with FHA that elects deferred forgivable loan structure). If the Debt Coverage Ratio is less than the minimum 1.15, staff will not make adjustments to the interest rate and financing structure in accordance with 10 TAC §11.302.
 - ~~If COCA is awarded, a second note will be issued for all applicants, and may be deferred forgivable at 0.0% interest or have the balance deferred payable at as low as 0.25%, as selected by the applicant in the application and approved by underwriting. ~~or deferred payable at as low as 0.25%. The second note will be for the greater of fifteen years from project completion, or once the funds are fully drawn down or the remaining funds returned to the Department, but no later than the LURA term.~~ COCA funds will be placed in a separate account; interest on that account may have to be returned to the Department annually (pending further HUD clarification). The second note will be payable in full or forgiven upon the greater of fifteen years from the project completion, or the term of a HAP Contract layered on the property and reflected in the underwriting report. The Department will require that funds not expended during the Federal Affordability Period be returned to the Department in accordance HUD Notice 21-10, unless the Federal~~

Affordability Period is being extended. If the Applicant selects a deferred forgivable note and also has Housing Tax Credits awarded to the property, a letter from the equity partner(s) is required before award stating that the partner(s) has considered the tax implications of a deferred forgivable loan.

- **Construction-Only Loans.** All Direct Loan requests structured as construction only loans, may request an interest rate as low as 0% with the principal amount of the HOME-ARP loan due upon the end of the construction loan term.
- **Loan Structure.** The term of the loan and the amortization period (not to exceed 40 years) will match any superior debt. Funds may be requested as fully amortizing, subject to FHA's definition of surplus cash and repayable annually out of 75% surplus cash, or deferred forgivable, as specified below.
 - Fully Amortizing – Available to all Applicants, Loans will be structured with regular principal and interest payments sufficient to fully repay the loan within the loan term. Interest will be as low as 0.25%.
 - ~~FHA-Insured – Currently Federal Housing Administration (FHA) layered transactions are ineligible for HOME-ARP. If these loans become eligible, interest will be as low as 0.25%. Federal Housing Administration (FHA) layered transactions are subject to FHA's definition of surplus cash and repayable annually out of 75% of surplus cash. FHA layered transactions layered with COCA are not eligible. Interest will be as low as 0.25%.~~
 - Deferred forgivable – Only available for Supportive Housing not layered with FHA. The Loan is only forgiven at the later of: (1) the end of the loan term, or (2) the end of the federal affordability period (e.g., at minimum the loan term must be 15 years ~~and six months~~). If Applicant selects a deferred forgivable loan and also has Housing Tax Credits awarded to the property, a letter from the equity partner(s) is required at Application stating that the partner(s) has considered the tax implications of a deferred forgivable loan. ~~If COCA is awarded, a second note will be issued for the greater of fifteen years from project completion, or once the funds are fully drawn down or the remaining funds returned to the Department, but no later than the LURA term.~~ Interest will be 0.0% for deferred forgivable loans.

Tab 49b. Rent Schedule 1-15

- The Rent Schedule is based off of the Rent Schedule already submitted for the last time the Development was underwritten. Only add HOME-ARP to the existing rent schedule and make adjustments as needed.
 - The number of low income Units and the associated rent restrictions cannot change from the last time the Development was underwritten, without contemporaneously submitting an Application amendment to Asset Management.
 - The resubmitted rent schedule cannot make changes to any Tax-Exempt Bond

Units (if applicable) or to the MFDL Units.

- The QP and HH/60% or HH/80% units must be proportionally distributed among similar Units at the Development (e.g. the HH/60% and HH/80% Units cannot all be 3 bedrooms while the QP Units are only 1-bedrooms). A similar Unit is the same bedroom/bath, similar features, and no more than 120 square feet difference.
- The rent for the QP Units are underwritten as zero in years 1-15.

Tip – Applicants may copy and paste individual columns from Tab 24 in the Uniform Application so that each drop down does not have to be selected individually.

- If a Development chooses to build optional low-income Units for HOME-ARP, up to 10% of the low income Units can be High HOME 80% Units. The remaining low-income Units must be High HOME 60% Units, per 24 CFR §92.216, Income Targeting.

Important – At least 10% of the QP Units must be available to all QPs. This means that at least 10% of the QP Units must be either not layered or layered on units that are have income requirements of 50% AMI or above. Said another way, at least 10% of the QP Units cannot be layered on Units with an AMI restriction of 30% since the limit of 30% AMI does not allow all QPs to be eligible to occupy the Unit (e.g., some QPs can have incomes up to 50% AMI).

- Example: Applicant is planning on 11 QP Units that are not layered, and 12 QP Units that are layered. Because the QP pay 30% of their income toward rent, these are underwritten at zero rent. For the layered Units, the most restrictive (e.g., QP Unit) is reflected in the “rent collected/unit” column.

selected in column B on their own row so the number of match units is correctly reflected in column G.

Rent Designations (select from Drop down menu)														Carryforward	
HTC Units	MFDL HOME Units	MFDL NHTF Units	HOME-ARP	Other/ Subsidy Units	# of Units	# of Bed-rooms	# of Baths	Unit Size (Net Rentable Sq. Ft.)	Total Net Rentable Sq. Ft.	Program Rent Limit	Tenant Paid Utility Allow.	Rent Collected /Unit	Total Monthly Rent for year of application	Rent Year in year 16	
					(A)			(B)	(A) x (B)			(E)	(A) x (E)	Total Monthly rent x 1.02 ¹⁵	
			TC 60%		11	1	1.0	500	5,500	555	55	500	5,500	\$ 7,402	
			TC 80%		12	2	1.0	700	8,400	665	65	600	7,200	\$ 9,690	
TC 50%					13	1	1.0	500	6,500	775	75	70	910	\$ 1,225	
TC 80%					14	2	1.0	700	9,800	885	85	800	11,200	\$ 15,074	

Tab 50. Rent Schedule 16-40

- Tab 50. Rent Schedule 16-40 is for rents expected in year 16 (after the HOME-ARP federal affordability period ends if there is no Housing Assistance Payment contract layered on the project). These forms show up to 40 years to assist with underwriting criteria, but the rents will last as long as the LURA and the state affordability period.
- The HOME-ARP federal affordability period is 15 years, or the expiration of a layered Housing Assistance Payment (HAP) contract. The rent limits for the HOME-ARP Units may be increased after the Federal Affordability Period (which on this form is after 15 years), though must remain affordable throughout the state affordability period. If the Applicant has a HAP contract layered on the project, the rents reflected on Tab 50 will take affect after the greater of 15 years or the end of the HAP contract.
- Layering HOME-ARP post year 15 is allowed with the same guidelines as Tab 24, Rent schedule. However, there will be no Units at zero rent collected, since QP units’

restrictions cease.

- For the HOME-ARP LURA, the rent levels post year 15 must be the same as other TDHCA programs on the Development whether the Units are layered or not. For example, the rent post year 15 can be HOME annual, 4% or 9% HTC, NHTF, Neighborhood Stabilization Plan (NSP), Tax Credit Assistance Program (TCAP) or other TDHCA funding source. The rent levels post year 15 cannot be restricted only to an external funding source or external affordable housing program.
- Guidance on rent levels (including rent levels during the state affordability period) is available at <https://www.tdhca.state.tx.us/home-arp/index.htm>.

Tip – Applicants may copy and paste individual columns from Tab 49b in the HOME-ARP Supplemental Application so that each drop down does not have to be selected individually.

Important – At least 20% of the Units must be for households at 60% or below AMI, and all Units must be for households at 80% or below AMI.

- The HOME-ARP Units must be indicated in HOME-ARP column, as well as the other layered sources. However, in years 16-40, the rent collected on the Unit will be the amount of the most restrictive layered source.
- Once the rent is entered by the Applicant in Rent Collected/Unit, the HOME-ARP Supplemental Application will automatically calculate the expected rent in 15 years with 2% inflation per year.
- If the HOME-ARP Unit was not layered in years 1-15, the Applicant will need to indicate what rent level from the other program will be charged.
 - Example:
 - the HOME-ARP Unit was not layered in years 1-15
 - the Development was layered with HTC Units, and
 - the Applicant wishes to have HTC rents on the HOME-ARP Units in the state affordability period.
 - the Applicant will indicate the rents to be charged in the corresponding rent designations in the HOME-ARP column.

selected in column B on their own row so the number of match units is correctly reflected in column G.														
Rent Designations (select from Drop down menu)														
Carryforward														
HTC Units	MFDL HOME Units	MFDL NHTF Units	HOME-ARP	Other/ Subsidy Units	# of Units	# of Bed-rooms	# of Baths	Unit Size (Net Rentable Sq. Ft.)	Total Net Rentable Sq. Ft.	Program Rent Limit	Tenant Paid Utility Allow.	Rent Collected /Unit	Total Monthly Rent for year of application	Rent Year in year 16
					(A)			(B)	(A) x (B)			(E)	(A) x (E)	Total Monthly rent x 1.02^15
			TC 60%		11	1	1.0	500	5,500	555	55	500	5,500	\$ 7,402
			TC 80%		12	2	1.0	700	8,400	665	65	600	7,200	\$ 9,690
TC 50%					13	1	1.0	500	6,500	775	75	70	910	\$ 1,225
TC 80%					14	2	1.0	700	9,800	885	85	800	11,200	\$ 15,074

Tab 51. HARP COCA

- Step 1:
 - **Step 1 is for all HOME-ARP Applicants regardless of whether the Applicant is requesting COCA.**
 - Step 1 should reflect what is on Tab 26 Annual Operating Expenses of the Uniform Multifamily Application. These amounts will populate into the pro formas in the supplemental application.

Tip – Applicants may copy and paste individual columns from Tab 26. Annual Operating Expenses in the

Uniform Application. However, the entire column of annual operating expenses cannot be copied at one time due to merged fields in the itemized budget.

- There are certain items eligible for COCA that may not be reflected on Tab 26, and could be added as “other” with a description on Tab 26 if the Applicant wishes to request these operating costs be reflected in the COCA. These are:
 - Other General Administration Costs:
 - Bank charges;
 - Internet; and
 - Other administrative costs that are reasonable and customary.
 - Payroll, Tax and Employee Benefits:
 - Resident Services Coordinator (pro-rated)
 - Employee compensation for employees assigned to building
 - Benefits for employees assigned to building
 - Education for employees assigned to building
 - Training for employees assigned to building
 - Travel for employees assigned to building
- Step 2:
 - Step 2 is only for Applicants requesting COCA.
 - A. HOME-ARP Units
 - This table automatically calculates total Units and total HOME-ARP Units from Tab 49b, Rent Schedule 1-15.
 - B. Units Mix
 - This table automatically calculates HOME-ARP QP Units and HH/60% and HH/80% Units from Tab 49b, Rent Schedule 1-15. Only HOME-ARP QP Units are eligible for COCA.
 - C. HOME-ARP Units for COCA
 - Applicant should complete this table based on how many QP Units are expected to have project-based rental assistance and/or operating assistance other than COCA. The percentage calculated in Table C is the total percent of Units that are eligible for HOME-ARP.
 - D. Square Footage Calculation
 - Applicant should complete the table using figures from Tab 22 in the Uniform Multifamily Application.
- Step 3:
 - Step 3 is only for Applicants requesting COCA.
 - Any HOME-ARP ineligible costs will be subtracted in Step 3. Most of these ineligible costs will populate from the operating expenses in Step 1 and will be automatically subtracted, but some ineligible costs may need to be submitted by the Applicant.
 - First a percentage of ineligible square footage is applied to the annual operating expenses, and subtracted from the total to account for the proportionality of ineligible costs. These were calculated in Step 2(D) and include but are not limited to:
 - detached leasing office;
 - detached garages;
 - commercial spaces; or
 - spaces not intended for tenants and their guests.

Important -- Replacement reserves and lease up reserves are not eligible for HOME-ARP, and should be removed under “Other ineligible costs” in Step 5.

- In addition, certain costs in the Operating Expenses are not eligible for HOME-ARP capitalized operating reserve, such as repairs and maintenance on a pool (or other ineligible HOME-ARP costs), cable TV, supportive services, and compliance fees. These costs are automatically subtracted, and there is additional space to add other ineligible costs as applicable. 10 TAC §13.3(e) lists ineligible costs for Multifamily Direct Loan funds, and which will also be ineligible for HOME-ARP, except for §13.3(e)(12) regarding reserve accounts. These costs include, but are not limited to:

- (1) Offsite costs;
- (2) Stored Materials;
- (3) Site Amenities, such as swimming pools and decking, landscaping, playgrounds, and athletic courts;
- (4) The purchase of equipment required for construction;
- (5) Furnishings and Furniture, Fixtures and Equipment (FF&E) required for the Development;
- (6) Detached Community Buildings;
- (7) Carports and/or parking garages, unless attached as a feature of the Unit;
- (8) Commercial Space costs;
- (9) Personal Property Taxes;
- (10) TDHCA fees;
- (11) Syndication and organizational costs;
- * (12) Reserve Accounts, except Initial Operating Deficit Reserve Accounts;
- (13) Delinquent fees, taxes, or charges;
- (14) Costs incurred more than 24 months prior to the effective date of the Direct Loan Contract, unless the Application is awarded TCAP RF, and if specifically allowed by the Board;
- (15) Costs that have been allocated to or paid by another fund source (except for soft costs that are attributable to the entire project as specifically identified in the applicable federal rule, or for TCAP RF if specifically allowed by the NOFA), including but not limited to, contingency, including soft cost contingency, and general partner loans and advances;
- (16) Deferred Developer Fee;
- (17) Texas Bond Review Board (BRB) fees;
- (18) Community Facility spaces that are not for the exclusive use of tenants and their guests;
- (19) The portion of soft costs that are allocated to support ineligible hard costs; and
- (20) Other costs limited by Award or NOFA, or as established by the Board;
- (21) Interest on Construction Loans; and
- (22) Acquisition that occurred before the Application Acceptance Date and environmental clearance for HOME and NSP projects. For NHTF, acquisition that occurred prior to Contract signing.

*COCA is a reserve account allowed for HOME-ARP that is not an initial operating deficit reserve account.

- Step 4:
 - The amount of COCA for year 1 is calculated by multiplying the percentage of QP Units eligible to receive COCA by the eligible annual operating costs.
 - Step 4 also calculates the total amount over 15 years, with inflation of 3% per year.
 - **Applicant must enter the total amount of COCA requested with the application in Year 1: COCA Requested.**
 - The total amount of COCA requested over the 15 years will be automatically calculated after the Year 1: COCA request is entered.

Tab 51a. Pro Forma 1-15

- The pro forma should largely self-populate, unless there are other expenses or income not included in Tabs 49b, Rent Schedule 1-15 or Tab 51 HARP COCA, Step 1 for the operating expenses. Any other items not included should be entered under “Other (Describe)” with a description.
- If COCA was requested in Tab 51, the amount indicated by the Applicant for the first year will automatically be entered under Income. COCA will automatically grow 3% growth in the pro forma.
- Any deferred developer’s fee must be the same amount or more as reflected in the latest REA report, and still must be shown to be able to be fully repaid by year 15.
- This pro forma should be signed.

Tab 52. Pro Forma 16-40

- The pro forma should largely self-populate, unless there are other expenses or income not included in Tabs 50, HARP Rent Schedule 16-40 or Tab 51 HARP COCA, Step 1. All income and expenses are adjusted for 2% growth (income) or 3% growth (expenses) each year from 1-15 and reflected in Year 16. Then the growth will still be 2% or 3% respectively and shown in each column. Any items not included should in Tabs 50 or 51 be entered under “Other (Describe)” with a description.
- If COCA was requested in Tab 51, the amount over 15 years would have expired in year 16, and will not be reflected on the 16-40 Pro Forma.
- Any deferred developer’s fee must be the same amount or more as reflected in the latest REA report, and still must be shown to be able to be fully repaid by year 15, so should not be reflected on the 16-40 Pro Forma.
- If (1) the project is layered with a Housing Assistance Payment (HAP) Contract, and (2) not all the HOME-ARP units are covered under the HAP contract: then an additional pro forma will be needed. HOME-ARP rental projects paired with a Housing Assistance Payment (HAP) contract will retain the HOME-ARP requirements for the greater of 15 years or the term of the HAP contract per HUD Notice 21-10. **Because each HAP contract may have a different term, the pro forma in Tab 52 will not reflect the extension for the units without HAP.** A QP Unit without HAP support or other project based rental assistance will continue to pay 30% of their income toward rent and will be underwritten as zero income until the end of the HAP contract. HOME ARP LI Units will continue using the HOME income and rent limitations until the end of the HAP Contract. **An applicant without HAP on each HOME-ARP unit must attach an additional pro forma behind Tab 52 showing how long the HOME-ARP requirements last past year 15.**

Tab 53. HOME-ARP Scoring

- Applicant should select the scoring items for which the Project is requesting points. When selecting points, the boxes should be checked in Column B and the points claimed will

automatically populate be entered into Column D.

- The Applicant should indicate at the top of Sections A, B and C, how many total points they are claiming, not exceeding the maximum point values for each section.
- Section D will auto-calculate based on the amounts entered into Sections 1-3.
- Section E is a reminder to submit attachments as required for the points claimed. Each attachment should be labeled according to the number of the scoring item.

Tab 53a. HOME-ARP Rental Tabs

- Applicant should indicate which of the Uniform Multifamily Application tabs have been updated for the HOME-ARP Rental Application. Boxes that are checked on Tab 53a indicate that the information in the tab from the most-recently approved application has been updated and submitted with the HOME-ARP Rental Application for review.
- Applicants that have both an award and active application should complete Tab 53a for the most recently approved application.
- Applicants are encouraged to change only what is essential to the HOME-ARP Rental application. Changes that affect their previous award may not be allowed.

Important – Applicants are encouraged to review “Appendix A: Uniform Multifamily Application Tabs with Additional Instructions or Updates and HOME-ARP Supplement” to determine which tabs they should update depending on their type of existing award.

- Tabs with required updates are:
 - Tab 17 – Development Narrative
 - Tab 30 - Development Cost Schedule
 - Tab 31 - Financing Narrative and Schedule of Sources
 - Tab 35 - Supporting documentation
 - Tab 47 - Third Party Reports.
- Tabs with possible updates are:
 - Tab 5 – Contact Info
 - Tab 7 – Site Info Part I (Required for HTC-only awardees)
 - Tab 8 – Supporting Documents (Required for HTC-only awardees)
 - Tab 11 – Site Info Part II
 - Tab 12 – Site Info Part III
 - Tab 20 – Existing Dev. Info (Required for HTC-only awardees)
 - Tab 21 – Occupied developments (possible update for HTC-only awardees)
 - Tab 25 – Utility Allowances (only if all-bills paid)
 - Tab 28 – Offsite Cost Breakdown
 - Tab 29 – Site Work Costs Breakdown
 - Tab 44 – Experience Certificate (Required for HTC-only awardees)
- Information that should not be changed:
 - Tab 6a Competitive HTC only Self Score
 - Tab 6b MFDL Only or MFDL Layered with HTC Self Score
 - Tab 14 – Elected Officials
 - Tab 15 – Neighborhood Organizations
 - Third Party Report - Primary Market Area
 - Tab 48 Tie Breakers


8. INSTRUCTIONS FOR CONVERTING THE EXCEL FILE TO PDF

Both the updated Uniform Multifamily Application and the HOME-ARP Supplemental Application should be submitted to constitute an entire HOME-ARP Application. The HOME-ARP Supplemental Application PDF may be combined into the Uniform Multifamily Application PDF, as the tab numbers are sequential.

Once the Excel Application file is complete and you are ready to convert the file to PDF, follow these instructions. **Be sure to check all of the Page Breaks in the Excel files before you convert to PDF.**

Applicants are reminded that both the Excel and PDF files must be submitted in order for the Application to be considered complete. The Excel file must be converted to PDF, Applications submitted as a scanned copy of the Excel file will be rejected as materially deficient.

Excel 2007 Users:

Click the **Microsoft Office Button** , point to the arrow next to **Save As**, and then click **PDF or XPS**.

1. In the **File Name** list, type or select a name for the workbook.
2. In the **Save as type** list, click **PDF**.
3. If you want to open the file immediately after saving it, select the **Open file after publishing** check box. This check box is available only if you have a PDF reader installed on your computer.
4. Next to **Optimize for**, do one of the following, depending on whether file size or print quality is more important to you:
 - If the workbook requires high print quality, click **Standard (publishing online and printing)**.
 - If the print quality is less important than file size, click **Minimum size (publishing online)**.
5. Click **Options**. Under **Publish What** select **Entire Workbook** and click **OK**.
6. Click **Publish**.

Excel 1997-2003 Users:

1. With the Excel file open go to the Adobe PDF drop-down box from the task bar (if using Excel 2007 click on "Acrobat" tab in the task bar)
2. Select "Convert to Adobe PDF" from the drop-down list (Excel 2007- select "Create PDF")
3. The Adobe PDFMaker box will appear. On the left hand side of the box all of the sheets within the Excel file will be listed and you will be prompted to select the sheets you would like to convert to PDF. Once the sheets you want to convert are selected click on the "Add Sheets" button to move those sheets over to the right-handed side of the Adobe PDFMaker box, this will list the sheets selected to be converted to PDF. Make sure the sheets are in order.
4. Once all sheets you have selected appear on the right-hand side under "Sheets in PDF" click on the "Convert to PDF" button.
5. You will be prompted to create a name and save the PDF file. The PDF file should be named in the following format -- <Application #_Development Name>.pdf (e.g. 18001_Austin_Crossing.pdf). If an Application number has not been previously assigned then the file should be named as follows

--

<Development Name>.pdf (e.g. Austin_Crossing.pdf)

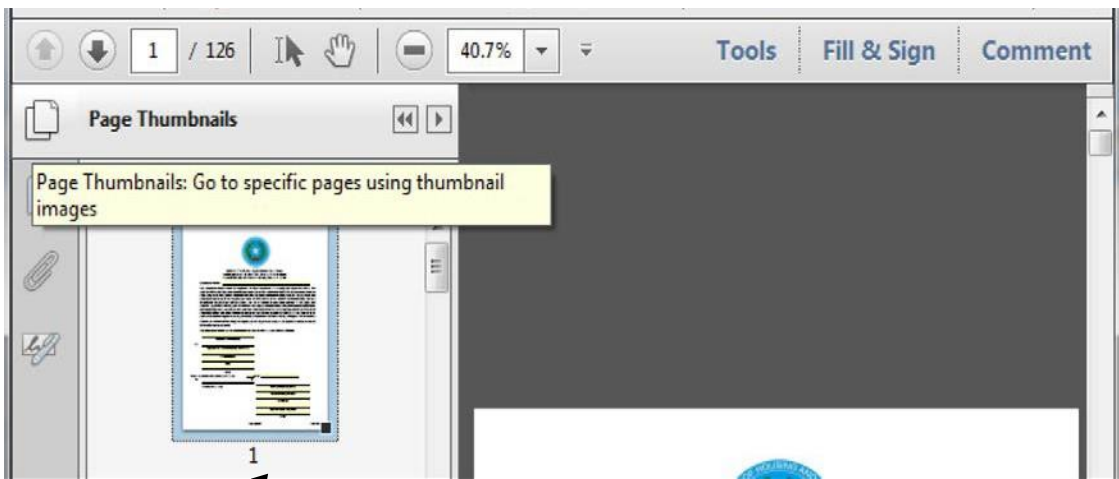
6. A pop-up box will appear that asks “Do you want to proceed without creating tags?” Click Yes.

Inserting Documents into the PDF.

No hard copy is required, only a LEGIBLE scanned copy within the final PDF file.

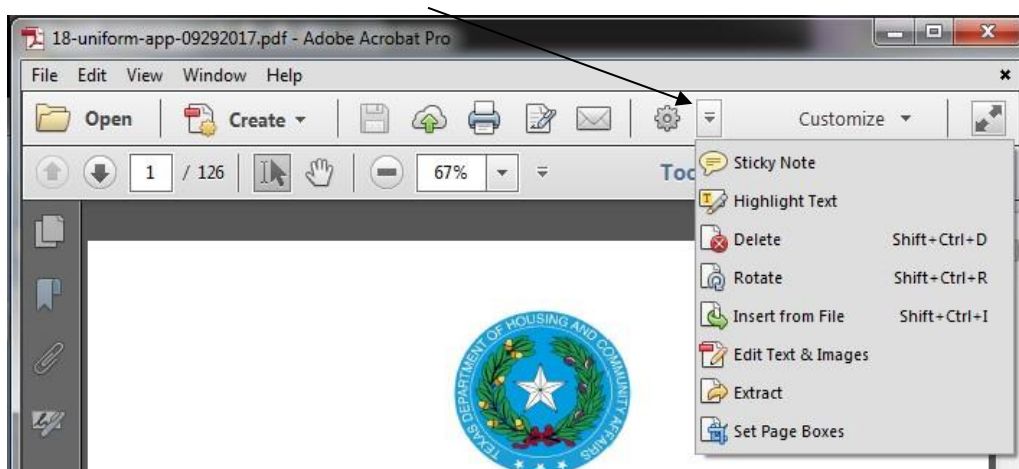
If there are documents to be submitted as part of the Application, include those documents in the pdf Application.

1. Convert the Excel application to pdf per the instructions above.
 2. Once you have collected all required executed documents, scan them as individual files and name them (“app-cert.pdf”, “owner-cert.pdf”, etc.).
 3. Insert the scanned forms into the pdf application in the order required. For instance, you will need to insert the signed Applicant Certification form. You can either:
- Click the “thumbnails” button, then drag and drop the pdf form before or after the existing form (thendelete the un-signed form):



Drag document to here. A line will appear showing where the document will be placed. You can also use this feature to put documents in the correct order.

- Or, use the “insert from file” option.



Select "Insert from File", navigate to document to be inserted and select it. In the dialog box, selected appropriate page number and indicate whether the document is to be inserted before or after that page. Click okay.

Do not submit a scanned copy of the Excel or PDF file. Scanned copies will be rejected as materially deficient.

The Application submitted should be the pdf file created from converting the Excel file (into which additional application documentation has been inserted), as well as the Excel file itself. A scanned Application cannot be reviewed, nor can an Excel file, both will be rejected.

Creating Bookmarks

Once the file has been converted to PDF and all executed forms have been inserted into their appropriate locations within the file, the Applicant will need to create Bookmarks. Bookmarks may or may not have already been created as part of the conversion process. The locations may need to be designated for the rest. To correctly set the Bookmark locations, open the PDF file in Adobe Acrobat. Click on the Bookmark icon located on the left-hand side of the Adobe Acrobat screen, or go to the task bar and select these options in the following order: **View**
→ Navigation Panels → Bookmarks.

If a Bookmark has already been created for each tab within the Excel file, re-set the bookmarks to the correct locations. To re-set the location for the Bookmarks, go to the first page of each separately labeled form/exhibit, right-click on the corresponding Bookmark for the form/exhibit, select **Set Destination** and a pop-up box will appear ask: "Are you sure you want to set the destination of the selected bookmark to the current location?" Select **Yes**.

If Bookmarks were not already created within the Excel file, they will need to be created. Go to **Document**
→ **Add Bookmark**. Right-click on the first Bookmark and re-name it for the appropriate form or exhibit. Set the location of the Bookmark by going to the first page of each form or exhibit, right click on the corresponding Bookmark and select **Set Destination**. A pop-up box will appear asking: "Are you sure you want to set the destination of the selected bookmark to the current location?" Select **Yes**.

Tabs within the Excel Application workbook have been color coded to distinguish between "Parts" of the Application consistent with this manual. Additionally, beside each bulleted item a label to use for purposes of bookmarking the final PDF Application file is included in parentheses.

If there are extra blank pages of any exhibit after conversion of the Excel file to PDF, they must be deleted in order to limit the size of the Application file. To delete any extra, unnecessary pages identify the page number(s) to be deleted. On the Adobe Acrobat Task Bar click on Document and select Delete Pages from the drop down list. A box will appear prompting a selection of the page(s) to be deleted. Enter the page numbers to be deleted and hit OK. If a page is deleted, the Applicant is responsible for ensuring it was done correctly and did not inadvertently delete pages that should have been retained.

The PDF formatted file must be checked for the following prior to submission:

- ✓ All tabs and/or volumes must be correctly bookmarked
- ✓ Files should average less than 100 kilobytes per page

- ✓ Files must be readable with free PDF file viewers including Adobe Reader and be compatible with Adobe Reader 5.0 and above
- ✓ Files should be saved so that “Fast Web View” (or page at a time downloading) is enabled
- ✓ Text within the PDF file should be searchable using the “Find” command in the PDF viewer

For questions on using or difficulties with the Microsoft Excel based Application, contact Tiara Hardaway at Tiara.Hardaway@tdhca.state.tx.us. In some instances a file may have small variations in bookmarks, file sizes, or readability that are not explicitly cited as requirements in the rule. Staff will use a reasonableness standard in determining when such deviations rise to the level of necessitating termination or other remedy.

10. APPLICATION ASSEMBLY INSTRUCTIONS

Prior to submitting the Application, a fully executed 2023 Electronic Application Filing Agreement should have already been submitted to Tiara Hardaway at Tiara.Hardaway@tdhca.state.tx.us. The Electronic Application Filing Agreement should be submitted at least five (5) days before the anticipated application submission date. Under the section “Select Program(s) for Application,” Applicant should select “Other” and type “HOME-ARP.”

Applicants are reminded that both the Excel and PDF files must be submitted in order for the Application to be considered complete. The Excel file must be converted to PDF, Applications submitted as a scanned copy of the Excel file will be rejected as materially deficient.

For each Application, the Applicant must ensure execution of all necessary forms and supporting documentation, and place them in the appropriate order according to this manual. The submitted Application should be the Excel file as well as the PDF created from the Excel file (with added documents). Do not print and scan the Excel file. Do not print and scan the PDF file. Convert the Excel form to a PDF, and then insert scanned pages only as indicated below. Scanned copies of the Application are difficult to read, are not searchable, raise questions regarding accuracy and will not be accepted.

All Application materials must be submitted via the Department’s secure web transfer server.

11. APPLICATION DELIVERY INSTRUCTIONS

Applications are accepted only through the Serv-U portal. Physical delivery of Applications will not be accepted. There are no application fees for HOME-ARP.

The Applicant is solely responsible for proper delivery of the Application.

Organizations interested in applying for the HOME American Rescue Plan (ARP) funds must complete the following steps to submit their applications/deficiencies/forms/reports electronically (applications are **NOT** accepted via mail, CD, or email):

The *Electronic Filing Agreement* should be submitted 5 business days prior to the anticipated application or pre-application submission date. Use this same system to upload all deficiency responses and subsequent forms/reports. Always notify the TDHCA staff member awaiting the submission.

Submitting an *Electronic Filing Agreement*

The *Electronic Filing Agreement* is available on the TDHCA website at:

<https://www.tdhca.state.tx.us/multifamily/apply-for-funds.htm>. Email the completed and signed form to Tiara Hardaway at Tiara.Hardaway@tdhca.state.tx.us five (5) days before the expected application submission date. A Login ID will be created.

Instructions to complete setup of the Serv-U HTTPs account will be emailed to the Owner and Consultant or 2nd Contact(s) listed on the *Electronic Filing Agreement*.

Note: Only the Owner will receive temporary passwords and have authority to create new passwords.

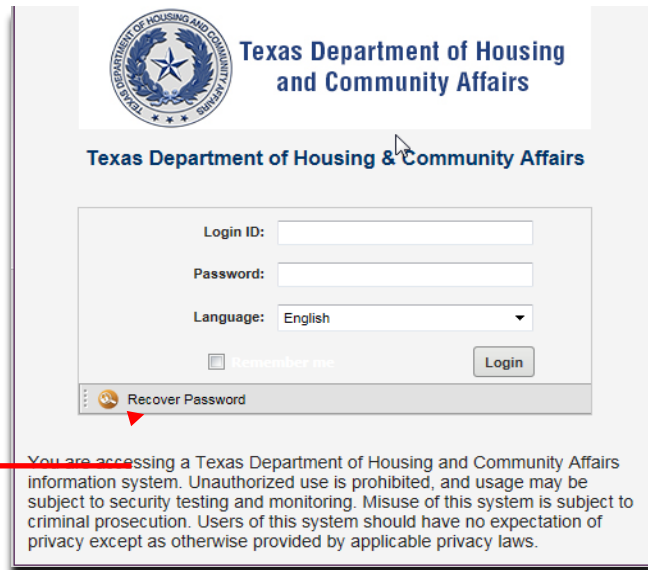
Log into the TDHCA HOME-ARP Serv-U HTTPs system with the Login ID assigned to the application. Detailed instructions are included in the sections below.

Important:

We strongly recommend uploading the application file(s) well before the submission deadline so any problems that arise can be addressed prior to the submission deadline.

Recovering your Password for the TDHCA MF Serv-U HTTPs System

To log into the TDHCA HOME-ARP Serv-U HTTPs System, first find the **Login ID** that was emailed to you (may need to check your SPAM or JUNK email folder). After you have your username go to the following website <https://transfer.tdhca.state.tx.us>. and click on **Recover Password**. (See Figure 2—1).

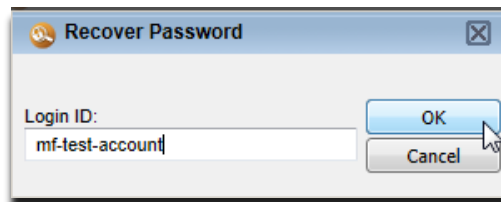


Recover Password

You are accessing a Texas Department of Housing and Community Affairs information system. Unauthorized use is prohibited, and usage may be subject to security testing and monitoring. Misuse of this system is subject to criminal prosecution. Users of this system should have no expectation of privacy except as otherwise provided by applicable privacy laws.

Figure 2—1

Enter your username in the **Login ID** box on the Recover Password screen and click **OK**. A new password will be emailed to the Owner's email address. (See Figure 2—2 and 2—3).



Recover Password

Login ID: mf-test-account

OK

Cancel

Figure 2—2

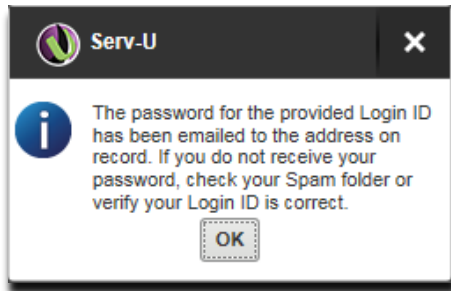


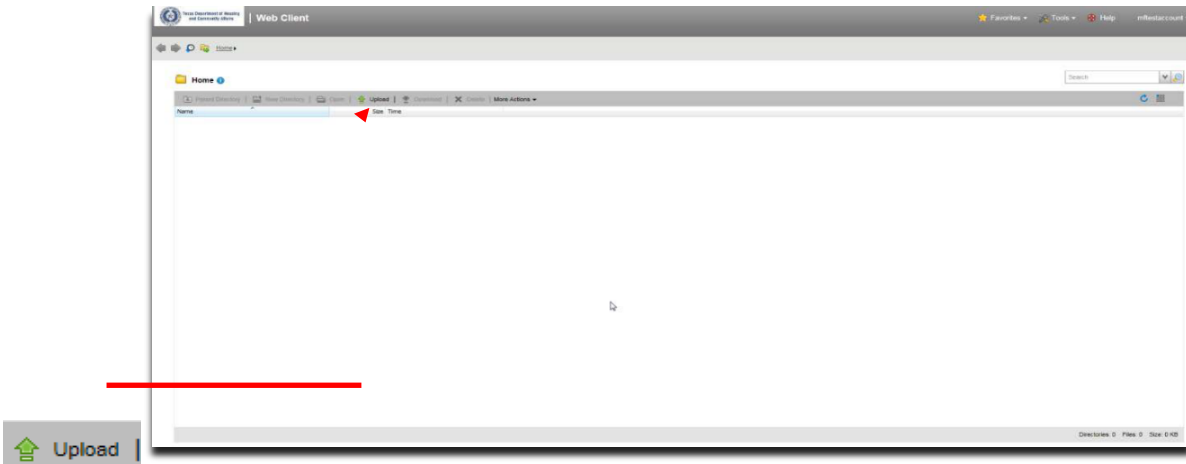
Figure 2—3
Logging into the TDHCA HARP Serv-U HTTPs System

To log into the TDHCA HOME-ARP Serv-U HTTPs System, go to the following website (<https://transfer.tdhca.state.tx.us>). and enter your username in the **Login ID** box and your temporary password into the **Password** box. Click the **Login** button to log into the system. (See Figure 3—1).

Figure 3—1
You will be prompted to **CHANGE PASSWORD**. The New Password must *be at least 8 characters and contain numbers, upper and lower case letters*. NO SYMBOLS will be accepted.

Uploading all application documents, including all attachments

Once you have logged into your account, you can view any information that has been uploaded to your account. To upload an application document, click the **Upload** button located at the top left of the screen (See Figure 4—1).Figure 4—1



Clicking the **Upload** button will pop up the **Upload Window**. Click the **Browse** button to navigate to the location where you saved the application documents (Figure 4—2). In this example, a test document is saved on the hard drive at the following location: c:\Users\lcline\Desktop\.

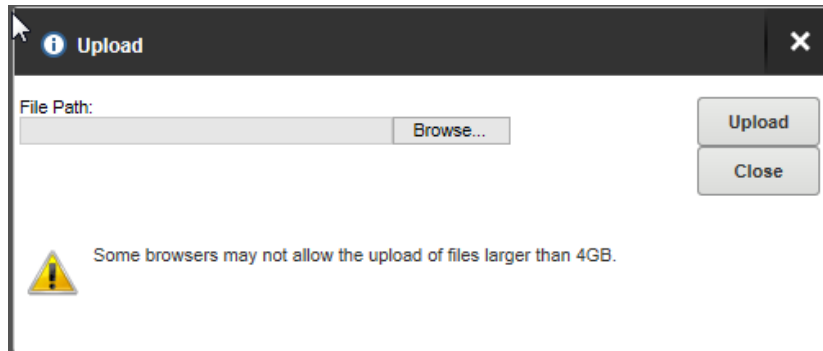


Figure 4—2

After you click the **Browse** button, navigate to the location where you saved your file(s) on your computer hard drive, flash drive or desktop. Once you have successfully navigated to the file, click on the file and then the location of the file will be placed into the **File Path** box. Now click the **Upload** button to upload the file to TDHCA (Figure 4—3).

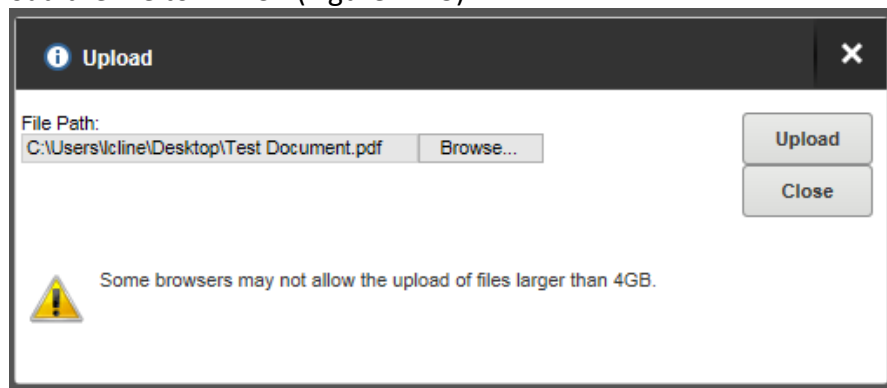


Figure 4—3

If you have more than one file to upload, you can repeat the last two steps of browsing for a file and uploading additional files. After you complete the upload process, click on the **Close** button to review the file or files that have been uploaded to TDHCA (Figure 4— 4).

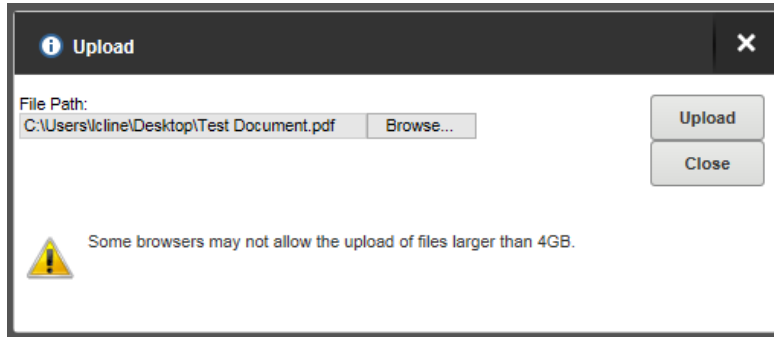


Figure 4—4

The upload process is now complete and you will be able to view the files that you uploaded to TDHCA. You will be able to see the name of the file under the **Name** heading, the size of the file under the **Size** heading, and the time the file was received under the **Time** heading. After uploading multiple files, you will be able to sort the documents by each of these headings (Figure 4—5).

Name	Size	Time
Financing with Tax Exempt Bonds.pdf	829.65 KB	11/2/2016 11:00:42 AM
Ignore.pdf	29.79 KB	11/2/2016 10:58:42 AM
Stamp.pdf	35.39 KB	11/2/2016 10:57:50 AM
Test Document.pdf	129.98 KB	11/30/2016 9:39:37 AM

Figure 4—5

Important Note Regarding Document Uploads

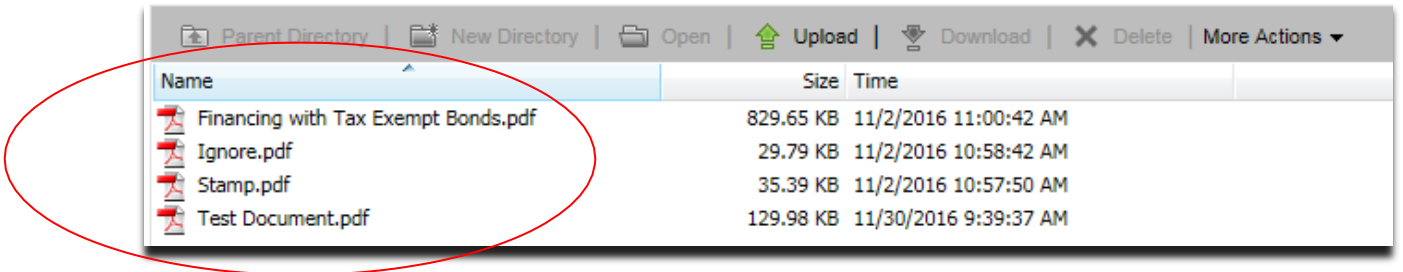
If a document is uploaded by mistake, please give the replacement file a different name and upload it. You will need to email Tiara Hardaway at Tiara.Hardaway@tdhca.state.tx to have the mistaken document removed.

Review documents

The screen print in Figure 5-1 shows the main screen that will be available when you are logged into the TDHCA U-Serv HTTPs System. In this screen you can view all of the documents that have

been uploaded to the system. As noted above, the window will show the names of files, sizes of files, and the time the files were received.

Files can be sorted by each of the previously mentioned headings (Name, Size, and Time). Any files that you see when you are looking at this screen are in the system and have been uploaded to TDHCA. These are the files that TDHCA staff will access. Applicants should ensure that uploaded documents open properly when they are selected and that they contain all of the information that the applicant intended to send.



Name	Size	Time
Financing with Tax Exempt Bonds.pdf	829.65 KB	11/2/2016 11:00:42 AM
Ignore.pdf	29.79 KB	11/2/2016 10:58:42 AM
Stamp.pdf	35.39 KB	11/2/2016 10:57:50 AM
Test Document.pdf	129.98 KB	11/30/2016 9:39:37 AM

Figure 5-1

Important Note Regarding Submission Time

Submission Time

The time displayed on the screen shows the time the file completed the download process and the entire file was received by TDHCA, it does not indicate the time that the file submission began.

NOTE: The upload time of each file will depend on the file size, the speed of the internet connection, and the number of users accessing the server at a given time. Applicants that wait until close to the submission deadline to upload their documents may not meet the deadline. Applications are **NOT** accepted via email or any other delivery mechanism.

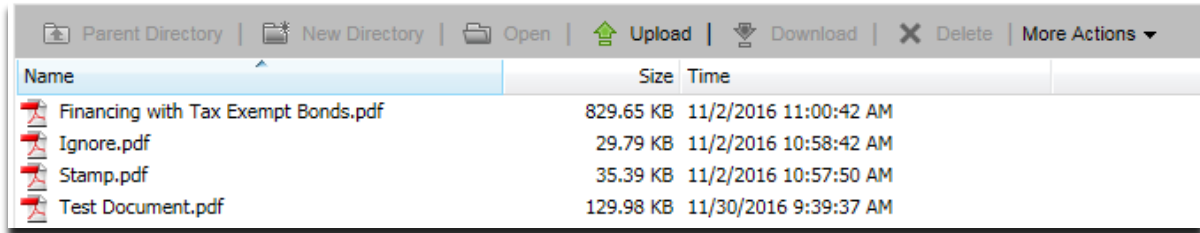
Saving Screen Print as submission confirmation

In the main screen, make sure that all of the submitted documents are clearly visible. Next, press the print screen button on your keyboard. This will take a copy of your screen and save it to your clipboard. Next open Microsoft Word, Wordpad, or your preferred document editing software. After the software is open, use the paste button to place the print screen into the document. Serv-U HTTPs does **not** automatically notify HOME-ARP staff when a file has been uploaded. It is the applicant's responsibility to contact HOME-ARP staff and make them aware that the file(s) have been uploaded. It is the applicant's responsibility to confirm that files have uploaded correctly. Right click the uploaded file and choose to 'view' the file to verify it opens properly.

General Information about the system: description of information displayed and function of buttons

Main Screen

When you are logged into the system you will see the screen in Figure 7—1. This is the main screen of the TDHCA Serv-U HTTPs System. This screen displays the files that you have uploaded to TDHCA and information about the files and system.



Name	Size	Time
Financing with Tax Exempt Bonds.pdf	829.65 KB	11/2/2016 11:00:42 AM
Ignore.pdf	29.79 KB	11/2/2016 10:58:42 AM
Stamp.pdf	35.39 KB	11/2/2016 10:57:50 AM
Test Document.pdf	129.98 KB	11/30/2016 9:39:37 AM

Figure 7—1

Refresh Button

The Blue arrow is the refresh button. It will refresh all the information displayed on the screen. (See Figure 7—2).

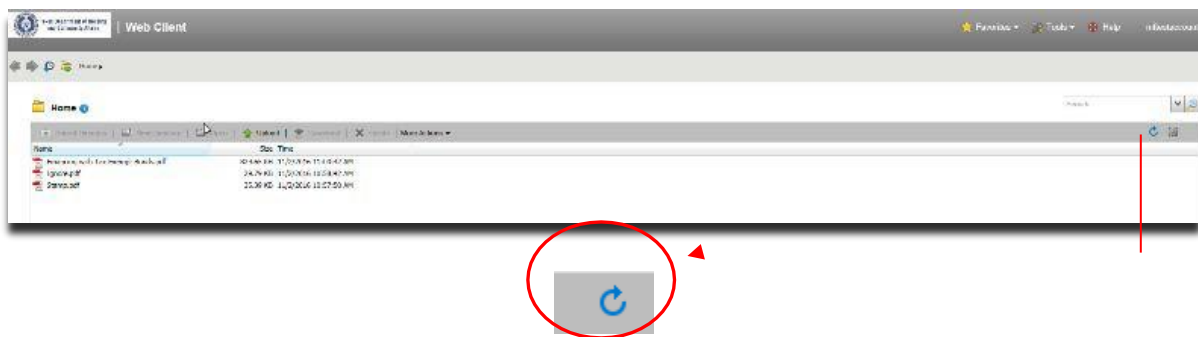


Figure 7—2

Log In Name

The system will show the username of the logged in account in the top right corner. (Figure 7—3).

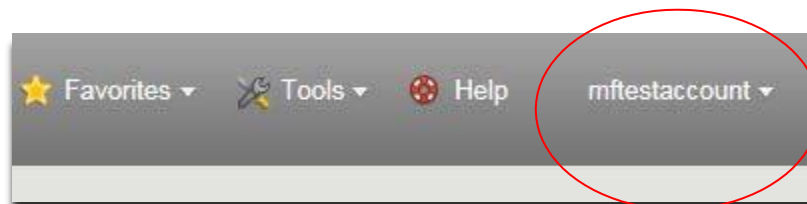

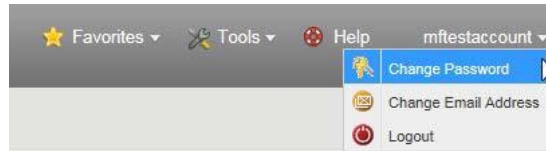


Figure 7—3

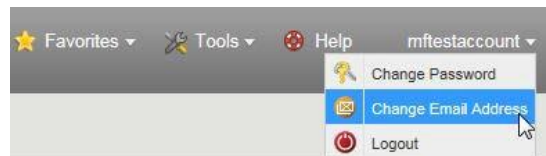
Useful Buttons


In the section below we have included an overview of some of the buttons you may find useful.

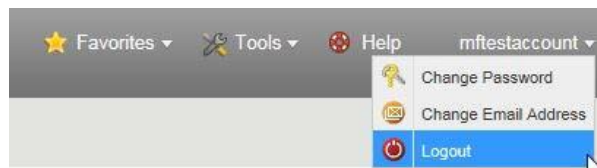
-  **Change View** -- Allows the user to change the view of uploaded items from thumbnail view to details view and vice versa.
- Change Password** -- Allows the logged-in user to change the password of the account if the user has been granted such permission.



- Change Email** -- Allows the logged-in user to change the email address for the account if the user has been granted such permission.



-  **Help** – Gives access to the help menu.
- Logout** – Allows user to logout of the system after you have completed your upload.



Menu Bar

At the bottom of the Window there is another menu bar with several useful functions and information that you will be able to use while logged into the system (Figure 7—4). The buttons are explained below:

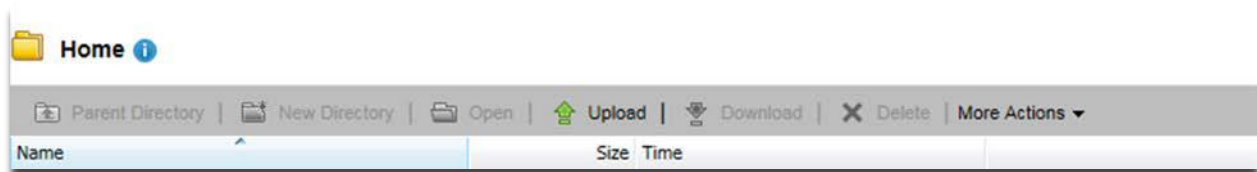

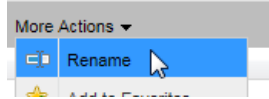



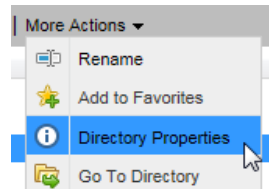
Figure 7—4

-  **Upload** | **Upload** – “Upload” begins the upload process.

-  **Download** – *Only visible when you have a file selected in the main window.*
Click “Download” to download the file that you have selected.
- **Rename** -- You will not be able to rename files once they have been uploaded to TDHCA.



-  **Delete** – You will not be able to delete files once they have been uploaded to TDHCA.
- **Directory Properties** – Displays the properties of the folder.



- At the bottom right of the screen, the system will list the number of directories, files, and the size of all your files.

Directories: 0 Files: 2 Size: 36.22 KB

12. SUPPLEMENTAL INFORMATION

Requests for Waiver and Staff Determinations

The Department will accept requests for waivers and staff determinations prior to the HOME-ARP Rental NOFA’s first Application Acceptance Date. Requests should be submitted directly to the appropriate staff below and when possible submitted electronically, either through the Serv-U system (with an email to the appropriate staff member), or by email attachment. Hard copies will not be accepted.

Requests for waivers are appropriate when an Applicant violates a rule and/or proposes a development that violates a rule, and as such they must be specific to an actual proposed Development (or Application). Requests must establish that the need for the waiver is not within the control of the Applicant or is due to an overwhelming need and how, by granting the waiver it better serves the policies and purposes articulated in Chapter 2306 of the Tex. Gov’t Code. Applicants should familiarize themselves with §11.207 of the QAP and are encouraged to contact staff to discuss the request before submission. Waivers for Multifamily Direct Loan and HOME-ARP are also limited by 10 TAC §13.1(c). Waivers that would not require an amendment to the HOME-ARP Action Plan, amendment of the NOFA, or a regulatory waiver from HUD, that were already requested and approved for the Development will continue to be applied to the application.

Where the requirements of the QAP or Chapter 13 do not readily align with the activities proposed in an Application, an Applicant may request and Department staff may provide a determination to an Applicant explaining how staff will review an Application in relation to the applicable rules. In no instance will staff provide a determination regarding a scoring item. Any such request must be received by the Department prior to submission of the HOME-ARP Application. Staff may, in its sole discretion, provide the request to the Board for it to make the determination. For example, if an applicant proposes a scattered site development that involves different census tracts that would score differently on the Opportunity Index, that applicant may request a staff determination prior to application submission in order to ascertain how staff will apply the rule and ultimately award points. Similarly, an applicant proposing a combination of rehabilitation and adaptive reuse may request a staff determination as to how to classify the activity. Applicants should familiarize themselves with §11.1(k) of the QAP.

Appeals

An Applicant or Development Owner may appeal decisions made by the Department pursuant to 10 TAC §1.7, as applicable. Matters that can be appealed are described in the Rule.

Applicants must file a written Appeal of a staff decision with the Executive Director not later than the seventh calendar day after notice has been provided to the Appealing Party of the staff decision. Posting of materials or logs on the Department's website is considered "notice". The written appeal must specifically identify the grounds for the Appeal.

The Executive Director will respond in writing not later than the fourteenth day after the date of receipt of the Appeal. If the Applicant is not satisfied with the Executive Director's response, they may appeal in writing directly to the Board within seven days after the date of the Executive Director's response. The Appeal must be received by the Department at least fourteen days prior to the next scheduled Board meeting. Appeals received after the fourteenth calendar day prior to the Board meeting will generally be scheduled at the next subsequent Board meeting.

If the Applicant receives additional information after the Executive Director has denied the Appeal, but prior to the posting of the Appeal for Board consideration, the new information must be provided to the Executive Director for further consideration or the Board will not consider it. New information will cause the appeal deadlines to begin again.

The Board will hear public comment on the Appeal under its Public Comment Procedures in 10 TAC §1.10. While public comment will be heard, persons making public comment are not parties to the Appeal and no rights accrue to them as a result of the Appeal process.

Applicable appeals not submitted in accordance with 10 TAC §1.7 will not be considered, unless the Executive Director or Board, in the exercise of its discretion, determines there is good cause to consider the appeal.

All written appeals should be submitted to the HOME-ARP Director. Appeals may be uploaded

to the Serv-U file for the Application, in all instances the Applicant must email notification of the Appeal to Naomi Cantu at naomi.cantu@tdhca.state.tx.us.

Public Access to Applications

The Department will allow the public to view any Applications that have been submitted to the Department in an electronic format. An Applicant may request, via an open records request, an electric or paper copy between the hours of 8:00 a.m. and 5:00 p.m. (Austin local time) Monday through Friday. There may be an associated cost with requesting this information.

Appendix A: Uniform Multifamily Application Tabs with Additional Instructions or Updates and HOME-ARP Supplement

Applicants may use the chart below to determine which tabs should be updated for the HOME-ARP Supplemental Application.

Tab #	Applicants with existing awards	Applicants with MFDL awards only	Applicants with HTC awards only
1 App. Cover	n/a	n/a	n/a
1a. Certifications	n/a	n/a	n/a
1b. 4% HTC-Bond Filing	n/a	n/a	n/a
2. Cert. of Dev. Owner	n/a	n/a	n/a
3 Appl. Elig. Cert.	n/a	n/a	n/a
4. MF Direct Loan Cert.	n/a	MFDL certification required for applicants with only HTC.	
5. Contact Info	Update if applicable: Contact info.	Update if applicable: Contact info.	
6a. Competitive HTC Self Score	n/a	n/a	
6b. MFDL Self Score	n/a	n/a	
7. Site Info Part I	n/a	Required update: Question 8, Site and Neighborhood Standards.	
8. Supporting Docs	n/a	Required update: Site and Neighborhood Standards.	
9. Site Info Part II	n/a	n/a	
10. Supporting Docs II	n/a	n/a	
11. Site Info Part III	Update if applicable: If extended site control, update needed.	Update if applicable: If extended site control, update needed.	
12. Supporting Docs III	Update if applicable: If extended site control, supporting docs needed.	Update if applicable: If extended site control, supporting docs needed.	
13. Multi Site Info	n/a	n/a	
14. Elected Officials	n/a	n/a	

Tab #	Applicants with existing awards	with MFDL	Applicants with HTC awards only
15. Neighborhood Orgs.	n/a		n/a
16. Cert. of Notifications	n/a		n/a
17. Dev. Narrative	Required update: Target Population, Development Narrative, Previously Awarded State and Federal Funds (as applicable)		Required update: Target Population, Development Narrative, Previously Awarded State and Federal Funds (as applicable)
18. Development Activities I	n/a		n/a
19. Dev. Activities II	n/a		n/a
19a. Income and Rent Levels	n/a		n/a
20. Existing Dev. Info	n/a		Required update: Lead Based Paint.
21. Occupied Devs.	n/a		Update if applicable: If occupied development, tab is needed.
22. Architectural Drawings	n/a		n/a
23. BldgUnit Config	n/a		n/a
23a. Mobility Units	n/a		n/a
23b. HV Units	n/a		n/a
23c. Parking	n/a		n/a
23d. Architect Certification	n/a		n/a
24. Rent Schedule	n/a		n/a
24a. Average Income Calc.	n/a		n/a
25. Utility Allowance	Update if applicable: utility allowance only allowed to be updated if Development was		Update if applicable: utility allowance only allowed to be updated if Development was originally all bills paid.

Tab #	Applicants with existing awards	with MFDL Applicants with HTC awards only
	originally all bills paid.	
26. Annual Operating Expenses	n/a	n/a
27. Pro Forma	n/a	n/a
28. Off-site Cost	Update if applicable: Off site costs may need to be updated to support development cost schedule.	Update if applicable: Off site costs may need to be updated to support development cost schedule.
29. Site Work Cost	Update if applicable: Update to be consistent with site work costs breakdown.	Update if applicable: Update to be consistent with site work costs breakdown.
30. Development Cost Schedule	Required update: If acquisition occurred = HOME-ARP ineligible. Reserve narratives required (if applicable). No increase in developer fee/decrease in deferred developer fee.	Required update: If acquisition occurred = HOME-ARP ineligible. Reserve narratives required (if applicable). No increase in developer fee/decrease in deferred developer fee.
31. Schedule of Sources	Required update: Include HOME-ARP as a funding source. Update to reflect increased costs.	Required update: Include HOME-ARP as a funding source. Update to reflect increased costs.
32. MF. Direct Loan - Fin.Cap	n/a	n/a
33. Match Funds	n/a	n/a
34. Financing Sourcing	n/a	n/a

Tab #	Applicants with existing awards	with MFDL Applicants with HTC awards only
35. Supporting Docs	Required update: Pro forma years 1-15 are in the HOME-ARP supplement. Signed construction contracts/contractor bids or schedule of values. Evidence of other cost increases.	Required update: Pro forma years 1-15 are in the HOME-ARP supplement. Signed construction contracts/contractor bids or schedule of values. Evidence of other cost increases.
36. Sponsor Characteristics	n/a	n/a
37. Org Charts	n/a	n/a
38. List Orgs and Principals	n/a	n/a
39. Previous Participation	n/a	n/a
40. Nonprofit Participation	n/a	n/a
41. Nonprofit Supporting Docs.	n/a	n/a
42. Dev. Team	n/a	n/a
44. Experience	n/a	Required update: Evidence of SAM.gov registration for the Unique Entity Number (UEIN) registration is required.
45. Credit Limit Docs.	n/a	n/a
46. Community Input	n/a	n/a
47. Third Party	Required update: Part 50/58 environmental review due in 3090 days from application submission. Add current market demand for QPs. Scope and Cost Review update (if applicable)	Required update: Part 50/58 environmental review due in 3090 days from application submission. Add current market demand for QPs. Scope and Cost Review update (if applicable)

Tab #	Applicants with existing awards	Applicants with MFDL awards	Applicants with HTC awards only
48. Tie-breakers	n/a		n/a
49. HOME-ARP Specifics	Required		Required
50. Rent Schedule 1-15	Required		Required
51. Rent Sched. 16-40	Required		Required
52. Operating and COCA	Required for Annual Operating Expenses. COCA is optional.		Required for Annual Operating Expenses. COCA is optional.
53. Pro Forma 1-15	Required		Required
54. Pro Forma 16-40	Required. <u>An attached pro forma is required if the project is layered with a HAP Contract and if the HAP Contract does not cover all HOME-ARP Units.</u>		Required. <u>An attached pro forma is required if the project is layered with a HAP Contract and if the HAP Contract does not cover all HOME-ARP Units.</u>
55. HOME-ARP Scoring	Required		Required
56. HOME-ARP Funding Request	Required for construction. Nonprofit capacity building and nonprofit operating costs are optional.		Required for construction. Nonprofit capacity building and nonprofit operating costs are optional.
57. HOME-ARP Tabs	Required		Required

