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# 2026 Federal Low Income Housing Tax Credit Program for Virginia

## Application For Reservation

### **Deadline for Submission**

#### 9% Competitive Credits

Applications and Fees Must Be Received

No Later Than **12:00 PM** Richmond, VA Time On **March 12, 2026**

#### Tax Exempt Bonds

Applications and Fees Must Be Received

No Later Than **12:00 PM** Richmond, VA Time for one of the available  
4% credit rounds- **January 15, 2026, July 1, 2026** or **October 1, 2026**.

Virginia Housing  
601 South Belvidere Street  
Richmond, Virginia 23220-6500



## INSTRUCTIONS FOR THE VIRGINIA 2026 LIHTC APPLICATION FOR RESERVATION

This application was prepared using Excel, Microsoft Office 365. Please note that using the active Excel workbook does not eliminate the need to submit the required PDF of the signed hardcopy of the application and related documentation. A more detailed explanation of application submission requirements is provided below and in the Application Manual.

**An electronic copy of your completed application is a mandatory submission item.**

### Applications For all credits:

Applicants should submit the application package via Procorem prior to the application deadline, which is **12:00 PM** Richmond Virginia time for each round. Failure to submit an electronic copy of the application by the deadline will cause the application to be disqualified.

### **Please Note:**

**Applicants should submit all application materials in electronic format only via your specific Procorem workcenter.**

There should be **distinct files** which should include the following:

1. **Application For Reservation** – the active Microsoft Excel workbook
2. **A PDF file which includes the following:**
  - **Application For Reservation** – Signed version of hardcopy
  - **All application attachments** (i.e. tab documents, excluding market study and plans & specs)
3. **Market Study** – PDF or Microsoft Word format
4. **Plans** - PDF or other readable electronic format
5. **Specifications** - PDF or other readable electronic format (may be combined into the same file as the plans if necessary)
6. **Unit-By-Unit work write up (rehab only)** - PDF or other readable electronic format

### **IMPORTANT:**

**Virginia Housing only accepts files via our work center sites on Procorem. Contact [TaxCreditApps@virginiahousing.com](mailto:TaxCreditApps@virginiahousing.com) for access to Procorem or for the creation of a new deal workcenter. Do not submit any application materials to any email address unless specifically requested by the Virginia Housing LIHTC Allocation Department staff.**

### Disclaimer:

Virginia Housing assumes no responsibility for any problems incurred in using this spreadsheet or for the accuracy of calculations. Check your application for correctness and completeness before submitting the application to Virginia Housing.

### Entering Data:

Enter numbers or text as appropriate in the blank spaces highlighted in yellow. Cells have been formatted as appropriate for the data expected. All other cells are protected and will not allow changes.

### **Please Note:**

- ▶ **VERY IMPORTANT! : Do not** use the copy/cut/paste functions within this document. Pasting fields will corrupt the application and may result in penalties. You may use links to other cells or other documents but do not paste data from one document or field to another. You may also use the drag function.
- ▶ Some fields provide a dropdown of options to select from, indicated by a down arrow that appears when the cell is selected. Click on the arrow to select a value within the dropdown for these fields.
- ▶ The spreadsheet contains multiple error checks to assist in identifying potential mistakes in the application. These may appear as data is entered but are dependent on values entered later in the application. Do not be concerned with these messages until all data within the application has been entered.
- ▶ Also note that some cells contain error messages such as “#DIV/0!” as you begin. These warnings will disappear as the numbers necessary for the calculation are entered.

### Assistance:

If you have any questions, please contact the Virginia Housing LIHTC Allocation Department. Please note that we cannot release the copy protection password.

### **Virginia Housing LIHTC Allocation Staff Contact Information**

<b>Name</b>	<b>Email</b>	<b>Phone Number</b>
Stephanie Flanders	<a href="mailto:stephanie.flanders@virginiahousing.com">stephanie.flanders@virginiahousing.com</a>	(804) 343-5939
Phil Cunningham	<a href="mailto:phillip.cunningham@virginiahousing.com">phillip.cunningham@virginiahousing.com</a>	(804) 343-5514
Lauren Dillard	<a href="mailto:lauren.dillard@virginiahousing.com">lauren.dillard@virginiahousing.com</a>	(804) 584-4729
Hadia Ali	<a href="mailto:hadia.ali@virginiahousing.com">hadia.ali@virginiahousing.com</a>	(804) 343-5873

**TABLE OF CONTENTS**

Click on any tab label to be directed to location within the application.

<b>TAB</b>	<b>DESCRIPTION</b>
1. <a href="#"><u>Submission Checklist</u></a>	Mandatory Items, Tabs and Descriptions
2. <a href="#"><u>Development Information</u></a>	Development Name and Locality Information
3. <a href="#"><u>Request Info</u></a>	Credit Request Type
4. <a href="#"><u>Owner Information</u></a>	Owner Information and Developer Experience
5. <a href="#"><u>Site and Seller Information</u></a>	Site Control, Identity of Interest and Seller info
6. <a href="#"><u>Team Information</u></a>	Development Team Contact information
7. <a href="#"><u>Rehabilitation Information</u></a>	Acquisition Credits and 10-Year Look Back Info
8. <a href="#"><u>Non Profit</u></a>	Non Profit Involvement, Right of First Refusal
9. <a href="#"><u>Structure</u></a>	Building Structure and Units Description
10. <a href="#"><u>Utilities</u></a>	Utility Allowance
	Building Amenities above Minimum Design Requirements
11. <a href="#"><u>Enhancements</u></a>	
12. <a href="#"><u>Special Housing Needs</u></a>	504 Units, Sect. 8 Waiting List, Rental Subsidy
13. <a href="#"><u>Unit Details</u></a>	Set Aside Selection and Breakdown
14. <a href="#"><u>Budget</u></a>	Operating Expenses
15. <a href="#"><u>Hard Costs</u></a>	Development Budget: Contractor Costs
	Development Budget: Owner's Costs, Developer Fee, Cost Limits
16. <a href="#"><u>Owner's Costs</u></a>	
17. <a href="#"><u>Eligible Basis</u></a>	Eligible Basis Calculation
	Construction, Permanent, Grants and Subsidized Funding Sources
18. <a href="#"><u>Sources of Funds</u></a>	
19. <a href="#"><u>Equity</u></a>	Equity and Syndication Information
20. <a href="#"><u>Gap Calculation</u></a>	Credit Reservation Amount Needed
21. <a href="#"><u>Cash Flow</u></a>	Cash Flow Calculation
22. <a href="#"><u>BINs</u></a>	BIN by BIN Eligible Basis
23. <a href="#"><u>Owner Statement</u></a>	Owner Certifications
24. <a href="#"><u>Architect's Statement</u></a>	Architect's agreement with proposed deal
25. <a href="#"><u>Previous Participation Certification</u></a>	Mandatory form related to principals
26. <a href="#"><u>Scoresheet</u></a>	Self Scoresheet Calculation
27. <a href="#"><u>Development Summary</u></a>	Summary of Key Application Points
28. <a href="#"><u>Efficient Use of Resources (EUR)</u></a>	Calculates Points for Efficient Use of Resources
	For Mixed Construction type Applications only - indicates how costs are distributed across the different construction activities
29. <a href="#"><u>Mixed Construction - Cost Distribution</u></a>	

## 2026 Low-Income Housing Tax Credit Application For Reservation

Please indicate if the following items are included with your application by putting an 'X' in the appropriate boxes. Your assistance in organizing the submission in the following order, and actually using tabs to mark them as shown, will facilitate review of your application. Please note that all mandatory items must be included for the application to be processed. The inclusion of other items may increase the number of points for which you are eligible under Virginia Housing's point system of ranking applications, and may assist Virginia Housing in its determination of the appropriate amount of credits that may be reserved for the development.

- |                                     |  |
|-------------------------------------|--|
| <input checked="" type="checkbox"/> | \$1,000 Application Fee <b>(MANDATORY)</b> - Invoice information will be provided in your Procorem Workcenter                        |
| <input checked="" type="checkbox"/> | Electronic Copy of the Microsoft Excel Based Application <b>(MANDATORY)</b>  |
| <input checked="" type="checkbox"/> | PDF Copy of the <b>Signed</b> Tax Credit Application with Attachments (Tabs A-AB) <b>(MANDATORY)</b>                                 |
| <input checked="" type="checkbox"/> | Electronic Copy of the Market Study <b>(MANDATORY - Application will be disqualified if study is not submitted with application)</b> |
| <input checked="" type="checkbox"/> | Electronic Copy of the Plans <b>(MANDATORY)</b>  |
| <input checked="" type="checkbox"/> | Electronic Copy of the Specifications <b>(MANDATORY)</b>   |
| <input checked="" type="checkbox"/> | Electronic Copy of the Existing Condition questionnaire <b>(MANDATORY if Rehab)</b>  |
| <input checked="" type="checkbox"/> | Electronic Copy of Unit by Unit Matrix and Scope of Work narrative <b>(MANDATORY if Rehab)</b>                                       |
| <input type="checkbox"/>            | Electronic Copy of the Physical Needs Assessment <b>(MANDATORY at reservation for a 4% rehab request)</b>                            |
| <input checked="" type="checkbox"/> | Electronic Copy of Appraisal <b>(MANDATORY if acquisition credits requested)</b>   |
| <input checked="" type="checkbox"/> | Electronic Copy of Environmental Site Assessment (Phase I) <b>(MANDATORY if 4% credits requested)</b>                                |
| <input checked="" type="checkbox"/> | Electronic Copy of Signed Previous Participation Agreement   |
| <input type="checkbox"/>            |  |
| <input checked="" type="checkbox"/> | Tab A: Chart of ownership structure with percentage of interests (see manual for details) <b>(MANDATORY)</b>                         |
| <input checked="" type="checkbox"/> | Tab B: Virginia State Corporation Commission Certification <b>(MANDATORY)</b>  |
| <input checked="" type="checkbox"/> | Tab C: Syndicator's or Investor's Letter of Intent <b>(MANDATORY)</b>  |
| <input type="checkbox"/>            | Tab D: <i>Any supporting documentation related to List of LIHTC Developments or Previous Participation Agreement</i>                 |
| <input checked="" type="checkbox"/> | Tab E: Site Control Documentation & Most Recent Real Estate Tax Assessment <b>(MANDATORY)</b>  |
| <input checked="" type="checkbox"/> | Tab F: Third Party RESNET Rater Certification and Sample HERS certificates <b>(MANDATORY)</b>  |
| <input checked="" type="checkbox"/> | Tab G: Zoning Certification Letter <b>(MANDATORY)</b>  |
| <input checked="" type="checkbox"/> | Tab H: Attorney's Opinion using Virginia Housing template <b>(MANDATORY)</b>   |
| <input type="checkbox"/>            | Tab I: Nonprofit Questionnaire <b>(MANDATORY for points or pool)</b>   |
|                                     | The following documents <b>need not be submitted unless requested</b> by Virginia Housing:   |
|                                     | -Nonprofit Articles of Incorporation      -IRS Documentation of Nonprofit Status   |
|                                     | -Joint Venture Agreement (if applicable)      -For-profit Consulting Agreement (if applicable)                                       |
| <input checked="" type="checkbox"/> | Tab J: Relocation Plan and Unit Delivery Schedule <b>(MANDATORY if Rehab)</b>  |
|                                     | Tab K: Documentation of Development Location:  |
| <input checked="" type="checkbox"/> | K.1 Revitalization Area Certification  |
| <input checked="" type="checkbox"/> | K.2 Surveyor's Certification of Proximity To Public Transportation using Virginia Housing template                                   |
| <input checked="" type="checkbox"/> | Tab L: PHA / Section 8 Notification Letter   |
| <input type="checkbox"/>            | Tab M: <i>(left intentionally blank)</i>   |
| <input type="checkbox"/>            | Tab N: Homeownership Plan  |
| <input checked="" type="checkbox"/> | Tab O: Plan of Development Certification Letter  |
| <input type="checkbox"/>            | Tab P: Zero Energy or Passive House documentation for prior allocation by this developer   |
| <input checked="" type="checkbox"/> | Tab Q: Documentation of Rental Assistance, Tax Abatement and/or existing RD or HUD Property  |
| <input checked="" type="checkbox"/> | Tab R: Documentation of Utility Allowance Calculation  |
| <input type="checkbox"/>            | Tab S: Supportive Housing Certification  |
| <input checked="" type="checkbox"/> | Tab T: Funding Documentation   |
| <input checked="" type="checkbox"/> | Tab U: Acknowledgement by Tenant of the availability of Renter Education provided by Virginia Housing                                |
| <input type="checkbox"/>            | Tab V: Nonprofit or LHA Purchase Option or Right of First Refusal  |
| <input checked="" type="checkbox"/> | Tab W: Internet Safety Plan and Resident Information Form  |
| <input checked="" type="checkbox"/> | Tab X: Marketing Plan for units meeting accessibility requirements of HUD section 504  |
| <input type="checkbox"/>            | Tab Y: Inducement Resolution for Tax Exempt Bonds  |
| <input type="checkbox"/>            | Tab Z: Documentation of team member's Veteran Owned Small Business certification   |
| <input checked="" type="checkbox"/> | Tab AA: Priority Letter from Rural Development   |
| <input type="checkbox"/>            | Tab AB: Ownership's Veteran Owned Small Business Certification   |

VHDA TRACKING NUMBER

2026-C-61

A. GENERAL INFORMATION ABOUT PROPOSED DEVELOPMENT

Application Date: 3/12/2026

1. Development Name: Powhatan Apartments

2. Address (line 1): 226 Burtonwood Drive  
 Address (line 2):  
 City: Williamsburg State: VA Zip: 23188

3. If complete address is not available, provide longitude and latitude coordinates (x,y) from a location on site that your surveyor deems appropriate. Longitude: 00.00000 Latitude: 00.00000  
 (Only necessary if street address or street intersections are not available.)

4. The Circuit Court Clerk's office in which the deed to the development is or will be recorded:  
 City/County of Williamsburg City

5. The site overlaps one or more jurisdictional boundaries. FALSE  
 If true, what other City/County is the site located in besides response to #4?

6. Development is located in the census tract of: 802.07

7. Development is located in a Qualified Census Tract. FALSE *Note regarding DDA and QCT*

8. Development is located in a Difficult Development Area. FALSE

9. Development is located in a Revitalization Area based on QCT. FALSE

10. Development is located in a Revitalization Area designated by resolution or by the locality. TRUE

11. Development is located in an Opportunity Zone (with a binding commitment for funding). FALSE  
 (If 9, 10 or 11 are True, Action: Provide required form in TAB K1)

12. Development is located in a census tract with a household poverty rate of:

	3%	10%	12%
	FALSE	FALSE	FALSE

13. Development is located in a medium or high-level economic development jurisdiction based on table. TRUE

14. Development is located on land owned by federally or Virginia recognized Tribal Nations. FALSE

Enter only Numeric Values below:

15. Congressional District: 1  
 Planning District: 1  
 State Senate District: 24  
 State House District: 69

16. Development Description: In the space provided below, give a brief description of the proposed development

Powhatan Apartments is a multi-family apartment complex consisting of (5) two-story apartment buildings targeting low-income families in the Town of Williamsburg. The project has vinyl exterior and consists of (48) two-bedroom apartment units. Powhatan Apartments James City LLC plans to expend over \$150,000 per unit in hard costs if awarded Tax Credit.

VHDA TRACKING NUMBER

2026-C-61

A. GENERAL INFORMATION ABOUT PROPOSED DEVELOPMENT

Application Date:

3/12/2026

17. Local Needs and Support

- a. Provide the name and the address of the chief executive officer (City Manager, Town Manager, or County Administrator of the political jurisdiction in which the development will be located:

Chief Executive Officer's Name: Scott Stevens  
 Chief Executive Officer's Title: County Administrator Phone: (757) 253-6603  
 Street Address: 101 Mounts Bay Road  
 City: Williamsburg State: VA Zip: 23185

Name and title of local official you have discussed this project with who could answer questions for the local CEO: Vaughn Poller - Administrator, Neighborhood Development

- b. If the development overlaps another jurisdiction, please fill in the following:

Chief Executive Officer's Name: \_\_\_\_\_  
 Chief Executive Officer's Title: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Street Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Name and title of local official you have discussed this project with who could answer questions for the local CEO: \_\_\_\_\_

**B. RESERVATION REQUEST INFORMATION**

**1. Requesting Credits From:**

a. If requesting 9% Credits, select credit pool:

Preservation

or

b. If requesting Tax Exempt Bond credits, select the round.

[Redacted]

For Tax Exempt Bonds, where are bonds being issued?

[Redacted]

**ACTION:** Provide Inducement Resolution at **TAB Y** (if available)

**2. Type(s) of Allocation/Allocation Year (skip for TE Credits)**

Carryforward Allocation

Definitions of types:

a. **Regular Allocation** means all of the buildings in the development are expected to be placed in service this calendar year, 2026.

b. **Carryforward Allocation** means all of the buildings in the development are expected to be placed in service within two years after the end of this calendar year, 2026, but the owner will have more than 10% basis in development before the end of twelve months following allocation of credits. For those buildings, the owner requests a carryforward allocation of 2026 credits pursuant to Section 42(h)(1)(E).

**3. Select Building Allocation type:**

Acquisition/Rehab

**Note** regarding Type = Acquisition and Rehabilitation: Even if you acquired a building this year and "placed it in service" for the purpose of the acquisition credit, you cannot receive its acquisition 8609 form until the rehab 8609 is issued for that building.

4. Is this an additional allocation for a development that has buildings not yet placed in service? FALSE

**5. Planned Combined 9% and 4% Developments**

a. A site plan has been submitted with this application indicating two developments on the same or contiguous site. One development relates to this 9% allocation request and the remaining development will be a 4% tax exempt bond application. FALSE

If true, provide name of companion development: [Redacted]

a. Has the developer met with Virginia Housing regarding the 4% tax exempt bond deal? FALSE

b. List below the number of units planned for each allocation request. **This stated split of units cannot be changed or 9% Credits will be cancelled.**

Total Units within 9% allocation request? 0

Total Units within 4% Tax Exempt allocation Request? 0

Total Units: 0

% of units in 4% Tax Exempt Allocation Request: 0.00%

**6. Extended Use Restriction**

**Note:** Each recipient of an allocation of credits will be required to record an **Extended Use Agreement** as required by the IRC governing the use of the development for low-income housing for at least 30 years. Applicant waives the right to pursue a Qualified Contract.

**Must Select One:** 50

**Definition of selection:**

Development will be subject to an extended use agreement of 35 additional years after the 15-year compliance period for a total of 50 years.

7. Virginia Housing would like to encourage the efficiency of electronic payments. Indicate if developer commits to submitting any payments due the Authority, including reservation fees and monitoring fees, by electronic payment. TRUE

**Virginia Housing offers the Rental Housing Invoicing Portal to allow easy payments via secure ACH transactions. See Login at top right of our website. An invoice for your application fee along with access information was provided in your development's assigned Procorem work center.**

**C. OWNERSHIP INFORMATION**

NOTE: Virginia Housing may allocate credits only to the tax-paying entity which owns the development at the time of the allocation. The term "Owner" herein refers to that entity. Please fill in the legal name of the owner. The ownership entity must be formed prior to submitting this application. Any transfer, direct or indirect, of partnership interests (except those involving the admission of limited partners) prior to the placed-in-service date of the proposed development shall be prohibited, unless the transfer is consented to by Virginia Housing in its sole discretion. **IMPORTANT: The Owner name listed on this page must exactly match the owner name listed on the Virginia State Corporation Commission Certification.**

**1. Owner Information:**

*Must be an individual or legally formed entity.*

a. Owner Name: Powhatan Apartments James City LLC

Developer Name: TM Associates Development, Inc.

Contact: M/M ▶ Mr. First: Adam MI: J. Last: Stockmaster

Address: 1375 Piccard Drive, STE 375

City: Rockville St. ▶ MD Zip: 20850

Phone: (240) 428-7799 Ext. 102 Fax:

Email address: astockmaster@tmamgroup.com

Federal I.D. No.  (If not available, obtain prior to Carryover Allocation.)

Select type of entity: ▶ limited liability company Formation State: ▶ Virginia

Additional Contact: Please Provide Name, Email and Phone number.  
Donald Nuzzio dnuzzio@tmamgroup.com, Matt Barila mbarila@tmamgroup.com

- ACTION:**
- a. Provide Certification from Virginia State Corporation Commission (**Mandatory TAB B**)
  - b. Complete the Principals' Previous Participation Certification tabs within this spreadsheet. Include signed in Application PDF, along with ROFR, if applicable.

b. FALSE Indicate if at least one principal listed within Org Chart has a Veteran-Owned Small Business Certification and has at least 25% ownership interest in the controlling general partner or managing member as defined in the manual.

**ACTION:** If true, provide Virginia Housing Veteran Owned Small Business Certification (**TAB AB**)

c. FALSE Indicate True if the owner meets the following statement:

**An applicant with a principal that, within three years prior to the current application, beginning with deals awarded in 2025, received an IRS Form 8609 for placing a separate 9% development in service without returning credits to or requesting additional credits from the issuing housing finance agency, will be permitted to increase the amount of developer's fee included in the development's eligible basis by 10%.**

If True above, what property placed in service?

**D. SITE CONTROL**

**NOTE:** Site control by the Owner identified herein is a mandatory precondition of review of this application. Documentary evidence in the form of either a deed, option, purchase contract or lease for a term longer than the period of time the property will be subject to occupancy restrictions must be included herewith. (For 9% Competitive Credits - An option or contract must extend beyond the application deadline by a minimum of four months.)

**Warning:** Site control by an entity other than the Owner, even if it is a closely related party, is not sufficient. Anticipated future transfers to the Owner are not sufficient. The Owner, as identified previously, must have site control at the time this Application is submitted.

**NOTE:** If the Owner receives a reservation of credits, the property must be titled in the name of or leased by (pursuant to a long-term lease) the Owner before the allocation of credits is made.

Contact Virginia Housing before submitting this application if there are any questions about this requirement.

**1. Type of Site Control by Owner:**

Applicant controls site by (select one):

Select Type:  Purchase Contract

Expiration Date: 12/31/2027

In the Option or Purchase contract - Any contract for the acquisition of a site with an existing residential property may not require an empty building as a condition of such contract, unless relocation assistance is provided to displaced households, if any, at such level required by Virginia Housing. See QAP for further details.

**ACTION:** Provide documentation and most recent real estate tax assessment - **Mandatory TAB E**

FALSE

There is more than one site for development and more than one form of site control.

(If **True**, provide documentation for each site specifying number of existing buildings on the site (if any), type of control of each site, and applicable expiration date of stated site control. A site control document is required for each site (**Tab E**.)

**2. Timing of Acquisition by Owner:**

Only one of the following statement should be True.

a. FALSE Owner already controls site by either deed or long-term lease.

b. TRUE Owner is to acquire property by deed (or lease for period no shorter than period property will be subject to occupancy restrictions) no later than 12/31/2027.

c. FALSE There is more than one site for development and more than one expected date of acquisition by Owner.

(If c is **True**, provide documentation for each site specifying number of existing buildings on the site, if any, and expected date of acquisition of each site by Owner (**Tab E**.)

**D. SITE CONTROL**

**3. Seller Information:**

Name: Powhatan Limited Partnership

Address: 1375 Piccard Drive, STE 375

City: Rockville St.: Maryland Zip: 20850

Contact Person: Robert Margolis Phone: (240) 683-0300

There is an identity of interest between the seller and the owner/applicant FALSE

If above statement is **TRUE**, complete the following:

Principal(s) involved (e.g. general partners, controlling shareholders, etc.)

<u>Names</u>	<u>Phone</u>	<u>Type Ownership</u>	<u>% Ownership</u>

**E. DEVELOPMENT TEAM INFORMATION**

**Complete the following as applicable to your development team.**

► Indicate Veteran Owned Small Business designation (as defined in the manual) to each team member (if applicable). You can mark True for 3 members to receive the full 10 points.

**ACTION:** Provide copy of certification from Commonwealth of Virginia, if applicable - **TAB Z**

1. Tax Attorney:	Allison T. Domson, Esq.	This is a Related Entity.	FALSE
Firm Name:	Williams Mullen		
Address:	200 South 10th Street, STE 1600	Veteran Owned Small Bus?	FALSE
City, State, Zip	Richmond, VA 23219		
Email:	adomson@williamsmullen.com	Phone:	(804) 420-6915
2. Tax Accountant:	Todd Fentress	This is a Related Entity.	FALSE
Firm Name:	Tidwell Group		
Address:	4249 Easton Way, TE 210	Veteran Owned Small Bus?	FALSE
City, State, Zip	Columbus, OH 43219		
Email:	todd.fentress@tidwellgroup.com	Phone:	(614) 528-1441
3. Consultant:		This is a Related Entity.	FALSE
Firm Name:			
Address:		Veteran Owned Small Bus?	FALSE
City, State, Zip		Role:	
Email:		Phone:	
4. Management Entity:	Ari D. Severe	This is a Related Entity.	TRUE
Firm Name:	TM Associates Management, Inc.		
Address:	1375 Piccard Drive, STE 375	Veteran Owned Small Bus?	FALSE
City, State, Zip	Rockville, MD 20850		
Email:	asevere@tmamgroup.com	Phone:	240-683-0300
5. Contractor:	Justin Denton	This is a Related Entity.	FALSE
Firm Name:	Morgan Keller Construction		
Address:	710 Thomas Johnson Dr #200	Veteran Owned Small Bus?	FALSE
City, State, Zip	Frederick, MD 21702		
Email:	jdenton@morgankeller.com	Phone:	(301) 663-0626
6. Architect:	Marc Feinstein	This is a Related Entity.	FALSE
Firm Name:	Miner Feinstein Architects		
Address:	241 E 4th St, Unit 207	Veteran Owned Small Bus?	FALSE
City, State, Zip	Frederick, MD 21701		
Email:	marc@mfarchitects.net	Phone:	(301) 760-7988

**E. DEVELOPMENT TEAM INFORMATION**

7. Real Estate Attorney:	Allison T. Domson, Esq.	This is a Related Entity.	FALSE
Firm Name:	Williams Mullen		
Address:	200 South 10th Street, STE 1600	Veteran Owned Small Bus?	FALSE
City, State, Zip	Richmond, VA 23219		
Email:	adomson@williamsmullen.com	Phone:	(804) 420-6915
8. Mortgage Banker:		This is a Related Entity.	FALSE
Firm Name:			
Address:		Veteran Owned Small Bus?	FALSE
City, State, Zip			
Email:		Phone:	
9. Other 1:		This is a Related Entity.	FALSE
Firm Name:			
Address:		Veteran Owned Small Bus?	FALSE
City, State, Zip		Role:	
Email:		Phone:	
10. Other 2:		This is a Related Entity.	FALSE
Firm Name:			
Address:		Veteran Owned Small Bus?	FALSE
City, State, Zip		Role:	
Email:		Phone:	
11. Other 3:		This is a Related Entity.	FALSE
Firm Name:			
Address:		Veteran Owned Small Bus?	FALSE
City, State, Zip		Role:	
Email:		Phone:	
12. Other 4:		This is a Related Entity.	FALSE
Firm Name:			
Address:		Veteran Owned Small Bus?	FALSE
City, State, Zip		Role:	
Email:		Phone:	
13. Other 5:		This is a Related Entity.	FALSE
Firm Name:			
Address:		Veteran Owned Small Bus?	FALSE
City, State, Zip		Role:	
Email:		Phone:	

**F. REHAB INFORMATION**

**1. Acquisition Credit Information**

a. Credits are being requested for existing buildings being acquired for development. TRUE

**Action:** If true, provide an electronic copy of the Existing Condition Questionnaire, Unit by Unit Matrix and Appraisal.

b. This development has received a previous allocation of credits TRUE  
 If so, when was the most recent year that this development received credits? 2002  
 If this is a preservation deal,  
 what date did this development enter its Extended Use Agreement period? 1/1/2017

c. The development has been provided an acknowledgement letter from Rural Development regarding its preservation priority? TRUE

d. This development is an existing RD or HUD S8/236 development. TRUE  
**Action:** (If True, provide required form in **TAB Q**)

Note: If there is an identity of interest between the applicant and the seller in this proposal, and the applicant is seeking points in this category, then the applicant must either waive their rights to the developer's fee or other fees associated with acquisition, or obtain a waiver of this requirement from Virginia Housing prior to application submission to receive these points.

i. Applicant agrees to waive all rights to any developer's fee or other fees associated with acquisition. FALSE

ii. Applicant has obtained a waiver of this requirement from Virginia Housing prior to the application submission deadline. FALSE

**2. Ten-Year Rule For Acquisition Credits**

a. All buildings satisfy the 10-year look-back rule of IRC Section 42 (d)(2)(B), including the 10% basis/\$15,000 rehab costs (\$10,000 for Tax Exempt Bonds) per unit requirement. TRUE

b. All buildings qualify for an exception to the 10-year rule under IRC Section 42(d)(2)(D)(i), FALSE

i. Subsection (I) FALSE

ii. Subsection (II) FALSE

iii. Subsection (III) FALSE

iv. Subsection (IV) FALSE

v. Subsection (V) FALSE

c. The 10-year rule in IRC Section 42 (d)(2)(B) for all buildings does not apply pursuant to IRC Section 42(d)(6). TRUE

d. There are different circumstances for different buildings. FALSE  
**Action:** (If True, provide an explanation for each building in Tab K)

**F. REHAB INFORMATION**

---

**3. Rehabilitation Credit Information**

- a. Credits are being requested for rehabilitation expenditures. TRUE
- b. **Minimum Expenditure Requirements**
- i. All buildings in the development satisfy the rehab costs per unit requirement of IRS Section 42(e)(3)(A)(ii). TRUE
- ii. All buildings in the development qualify for the IRC Section 42(e)(3)(B) exception to the 10% basis requirement (4% credit only) FALSE
- iii. All buildings in the development qualify for the IRC Section 42(f)(5)(B)(ii)(II) exception. FALSE
- iv. There are different circumstances for different buildings. FALSE  
**Action:** (If True, provide an explanation for each building in Tab K)

**G. NONPROFIT INVOLVEMENT**

**Applications for 9% Credits** - Section 1 must be completed in order to compete in the Non Profit tax credit pool.

**All Applicants** - Section 2 must be completed to obtain points for nonprofit involvement.

1. **Tax Credit Nonprofit Pool Applicants:** To qualify for the nonprofit pool, an organization (described in IRC Section 501(c)(3) or 501(c)(4) and exempt from taxation under IRC Section 501(a)) should answer the following questions as TRUE:

- FALSE a. Be authorized to do business in Virginia.
- FALSE b. Be substantially based or active in the community of the development.
- FALSE c. Materially participate in the development and operation of the development throughout the compliance period (i.e., regular, continuous and substantial involvement) in the operation of the development throughout the Compliance Period.
- FALSE d. Own, either directly or through a partnership or limited liability company, 100% of the general partnership or managing member interest.
- FALSE e. Not be affiliated with or controlled by a for-profit organization.
- FALSE f. Not have been formed for the principal purpose of competition in the Non Profit Pool.
- FALSE g. Not have any staff member, officer or member of the board of directors materially participate, directly or indirectly, in the proposed development as a for profit entity.

2. **All Applicants:** To qualify for points under the ranking system, the nonprofit's involvement need not necessarily satisfy all of the requirements for participation in the nonprofit tax credit pool.

A. Nonprofit Involvement (All Applicants)

FALSE There is nonprofit involvement in this development. (If false, skip to #3.)

**Action:** If there is nonprofit involvement, provide completed Non Profit Questionnaire (**Mandatory TAB I**).

B. Type of involvement:

FALSE Nonprofit meets eligibility requirement for points only, not pool.

or

FALSE Nonprofit meets eligibility requirements for nonprofit pool and points.

C. Identity of Nonprofit (All nonprofit applicants):

The nonprofit organization involved in this development is: ▶

Name:

Contact Person:

Street Address:

City:  State: ▶  Zip:

Phone:  Contact Email:

D. Percentage of Nonprofit Ownership (All nonprofit applicants):

Specify the nonprofit entity's percentage ownership of the general partnership interest:

**G. NONPROFIT INVOLVEMENT**

**3. Nonprofit/Local Housing Authority Purchase Option/Right of First Refusal**

A. FALSE After the mandatory 15-year compliance period, a qualified nonprofit or local housing authority will have the option to purchase or the right of first refusal to acquire the development for a price not to exceed the outstanding debt and exit taxes. Such debt must be limited to the original mortgage(s) unless any refinancing is approved by the nonprofit. See manual for more specifics.

**Action:** Provide Option or Right of First Refusal in recordable form using Virginia Housing's template. **(TAB V)**  
 Provide Nonprofit Questionnaire (if applicable) **(TAB I)**

**Name of qualified nonprofit:** \_\_\_\_\_

**or indicate true if Local Housing Authority** FALSE  
**Name of Local Housing Authority** \_\_\_\_\_

B. FALSE A qualified nonprofit or local housing authority submits a homeownership plan committing to sell the units in the development after the mandatory 15-year compliance period to tenants whose incomes shall not exceed the applicable income limit at the time of their initial occupancy.

**Do not select if extended compliance is selected on Request Info Tab**

**Action:** Provide Homeownership Plan **(TAB N)** and contact Virginia Housing for a Pre-Application Meeting

**NOTE:** Applicant is required to waive the right to pursue a Qualified Contract.

**H. STRUCTURE AND UNITS INFORMATION**

**1. General Information**

a. Total number of <b>all</b> units in development	<u>48</u>	bedrooms	<u>96</u>
Total number of <b>rental</b> units in development	<u>48</u>	bedrooms	<u>96</u>
Number of low-income rental units	<u>48</u>	bedrooms	<u>96</u>
Percentage of rental units designated low-income	<u>100.00%</u>		
b. Number of new units:	<u>0</u>	bedrooms	<u>0</u>
Number of adaptive reuse units:	<u>0</u>	bedrooms	<u>0</u>
Number of rehab units:	<u>48</u>	bedrooms	<u>96</u>
c. If any, indicate number of planned exempt units (included in total of all units in development)			<u>0</u>
d. Total Floor Area For The Entire Development			<u>39,627.00</u> (Sq. ft.)
e. Unheated Floor Area (i.e. Breezeways, Balconies, Storage)			<u>1,707.00</u> (Sq. ft.)
f. Nonresidential Commercial Floor Area (Not eligible for funding)			<u>1,800.00</u>
g. Total Usable Residential Heated Area			<u>36,120.00</u> (Sq. ft.)
h. Percentage of Net Rentable Square Feet Deemed To Be <b>New Rental Space</b>			<u>0.00%</u>
i. Exact area of site in acres	<u>4.107</u>		
j. Locality has approved a final site plan or plan of development. If <b>True</b> , Provide required documentation ( <b>TAB O</b> ).		<u>TRUE</u>	
k. Requirement as of 2016: Site must be properly zoned for proposed development. <b>ACTION:</b> Provide required zoning documentation ( <b>MANDATORY TAB G</b> )			
l. Development is eligible for Historic Rehab credits		<u>FALSE</u>	

**Definition:**

The structure is historic, by virtue of being listed individually in the National Register of Historic Places, or due to its location in a registered historic district and certified by the Secretary of the Interior as being of historical significance to the district, and the rehabilitation will be completed in such a manner as to be eligible for historic rehabilitation tax credits.

**H. STRUCTURE AND UNITS INFORMATION**

**2. UNIT MIX**

a. Specify the **average size and number per unit type:**

*LIHTC Units can not be greater than Total Rental Units*

Note: Average sq foot should include the prorata of common space.

Unit Type	Average Sq Foot		# of LIHTC Units	Total Rental Units
1 Story Eff - Elderly	0.00	SF	0	0
1 Story 1BR - Elderly	0.00	SF	0	0
1 Story 2BR - Elderly	0.00	SF	0	0
Eff - Elderly	0.00	SF	0	0
1BR Elderly	0.00	SF	0	0
2BR Elderly	0.00	SF	0	0
Eff - Garden	0.00	SF	0	0
1BR Garden	0.00	SF	0	0
2BR Garden	725.00	SF	48	48
3BR Garden	0.00	SF	0	0
4BR Garden	0.00	SF	0	0
2+ Story 2BR Townhouse	0.00	SF	0	0
2+ Story 3BR Townhouse	0.00	SF	0	0
2+ Story 4BR Townhouse	0.00	SF	0	0
			48	48

Note: Please be sure to enter the values in the appropriate unit category. If not, errors will occur on the self scoresheet.

**3. Structures**

- a. Number of Buildings (containing rental units) 5
- b. Age of Structure: 45 years
- c. Maximum Number of stories: 2

d. The development is a scattered site development. FALSE

e. Commercial Area Intended Use: N/A

f. Development consists primarily of : (Only One Option Below Can Be True)

- i. Low Rise Building(s) - (1-5 stories with any structural elements made of wood) TRUE
- ii. Mid Rise Building(s) - (5-7 stories with no structural elements made of wood) FALSE
- iii. High Rise Building(s) - (8 or more stories with no structural elements made of wood) FALSE

g. Indicate **True** for all development's structural features that apply:

- i. Row House/Townhouse FALSE
- ii. Garden Apartments TRUE
- iii. Slab on Grade TRUE
- iv. Crawl space FALSE
- v. Detached Single-family FALSE
- vi. Detached Two-family FALSE
- vii. Basement FALSE

h. Development contains an elevator(s). FALSE  
 If true, # of Elevators. 0  
 Elevator Type (if known)

**H. STRUCTURE AND UNITS INFORMATION**

- i. Roof Type ▶ Pitched
- j. Construction Type ▶ Frame
- k. Primary Exterior Finish ▶ Vinyl

**4. Site Amenities (indicate all proposed)**

a. Business Center	<u>FALSE</u>	f. Limited Access	<u>FALSE</u>
b. Covered Parking	<u>FALSE</u>	g. Playground	<u>TRUE</u>
c. Exercise Room	<u>FALSE</u>	h. Pool	<u>FALSE</u>
d. Gated access to Site	<u>FALSE</u>	i. Rental Office	<u>TRUE</u>
e. Laundry facilities	<u>TRUE</u>	j. Sports Activity Ct.	<u>FALSE</u>
		k. Other:	<u>Community Room</u>

l. Describe Community Facilities: Outdoor Gazeboo, Rental Office, Community Room, and Laundry facilities.

m. Number of Proposed Parking Spaces 60  
 Parking is shared with another entity FALSE

n. Development located within 1/2 mile of an existing commuter rail, light rail or subway station or 1/4 mile from existing or proffered public bus stop. TRUE  
 If **True**, Provide required documentation (TAB K2).

**5. Plans and Specifications**

- a. **Minimum submission requirements for all properties (new construction, rehabilitation and adaptive reuse):**
  - i. A location map with development clearly defined.
  - ii. Sketch plan of the site showing overall dimensions of all building(s), major site elements (e.g., parking lots and location of existing utilities, and water, sewer, electric, gas in the streets adjacent to the site). Contour lines and elevations are not required.
  - iii. Sketch plans of all building(s) reflecting overall dimensions of:
    - a. Typical floor plan(s) showing apartment types and placement
    - b. Ground floor plan(s) showing common areas
    - c. Sketch floor plan(s) of typical dwelling unit(s)
    - d. Typical wall section(s) showing footing, foundation, wall and floor structure  
 Notes must indicate basic materials in structure, floor and exterior finish.
- b. The following are due at reservation for Tax Exempt 4% Applications and at allocation for 9% Applications.
  - i. Phase I environmental assessment.
  - ii. Physical needs assessment for any rehab only development.
- c. **All Tax Exempt 4% Applications must submit plans and specifications complete at least through Design Development (DD) phase for all design disciplines.** Reference the separate Minimum Design and Construction Requirements document for a full list of submission requirements for New Construction and Rehabilitation projects.

**NOTE:** All developments must meet Virginia Housing's **Minimum Design and Construction Requirements**. By signing and submitting the Application for Reservation of LIHTC, the applicant certifies that the proposed project budget, plans & specifications and work write-ups incorporate all necessary elements to fulfill these requirements.

**J. ENHANCEMENTS**

Each development must meet the following baseline energy performance standard applicable to the development's construction category.

- a. **New Construction:** must obtain EnergyStar certification.
- b. **Rehabilitation:** renovation must result in at least a 30% performance increase or score an 80 or lower on the HERS Index.
- c. **Adaptive Reuse:** must score a 95 or lower on the HERS Index.

Certification and HERS Index score must be verified by a third-party, independent, non-affiliated, certified RESNET home energy rater. The HERS report should be completed for the whole development and not an individual unit.

Indicate **True** for the following items that apply to the proposed development:

**ACTION:** Provide RESNET rater certification of Development Plans **(TAB F)**

**ACTION:** Provide Internet Safety Plan and Resident Information Form **(Tab W)** if corresponding options selected below.

**REQUIRED:**

**1. For any development, upon completion of construction/rehabilitation:**

- TRUE a. A community/meeting room with a minimum of 749 square feet is provided with free WIFI access restricted to residents only.
- 50.00% b1. Percentage of brick covering the exterior walls.
- 50.00% b2. Percentage of Fiber Cement Board or other similar low-maintenance material approved by the Authority covering exterior walls. Community buildings are to be included in percentage calculations.
- TRUE c. All kitchen light fixtures are LED and meet MDCR lighting guidelines.
- TRUE d. Cooking surfaces are equipped with fire suppression features as defined in the manual
- TRUE e. Full bath fans are wired to primary light with delayed timer or has continuous exhaust by ERV/DOAS.
- or
- FALSE f. Full bath fans are equipped with a humidistat.
- TRUE g. All faucets, toilets and showerheads in each bathroom are WaterSense labeled products.
- TRUE h. Rehab Only: Each unit is provided with the necessary infrastructure for high-speed internet/broadband service where it does not already exist.
- TRUE i. Each unit is provided free individual high-speed internet access.  
*(Must have a minimum 20Mbps upload/ 100Mbps download speed per manual.)*
- TRUE j. Every kitchen, living room and bedroom contains, at minimum, one USB charging port.
- FALSE k. Rehab only: Each unit has dedicated space, drain and electrical hook-ups to accept a permanently installed dehumidification system.
- or
- TRUE l. All Construction types: each unit is equipped with a permanent dehumidification system.
- TRUE m. All interior doors within units are solid core.
- FALSE n. Installation of a renewable energy electric system in accordance with manufacturer's specifications and all applicable provisions of the National Electrical Code - Provide documentation at **Tab F**.
- FALSE o. New construction only: Each unit to have balcony or patio with a minimum depth of 5 feet clear from face of building and a minimum size of 30 square feet.

J. ENHANCEMENTS

For all developments exclusively serving elderly tenants upon completion of construction/rehabilitation:

- FALSE a. All cooking ranges have front controls.
- FALSE b. Bathrooms have an independent or supplemental heat source.
- FALSE c. All entrance doors have two eye viewers, one at 42" inches and the other at standard height.
- FALSE d. Each unit has a shelf or ledge outside the primary entry door located in an interior hallway.

2. Green Certification

- a. Applicant agrees to meet the base line energy performance standard applicable to the development's construction category as listed above.

The applicant will also obtain one of the following:

- |                                |   |                                |  |
|--------------------------------|---|--------------------------------|--|
| <input type="checkbox"/> FALSE | Earthcraft Gold or higher certification | <input type="checkbox"/> TRUE  | National Green Building Standard (NGBS) certification of Silver or higher. |
| <input type="checkbox"/> FALSE | LEED Certification                      | <input type="checkbox"/> FALSE | Enterprise Green Communities (EGC) Certification                           |

If Green Certification is selected, no points will be awarded for g. Watersense Bathroom fixtures above.

Action: If seeking any points associated Green certification, provide appropriate documentation at TAB F.

- b. Applicant will pursue one of the following certifications to be awarded points on a future development application. (Failure to reach this goal will not result in a penalty.)

- |                                |                                     |                                |                         |
|--------------------------------|-------------------------------------|--------------------------------|-------------------------|
| <input type="checkbox"/> FALSE | Zero Energy Ready Home Requirements | <input type="checkbox"/> FALSE | Passive House Standards |
|--------------------------------|-------------------------------------|--------------------------------|-------------------------|

- FALSE Applicant wishes to claim points from a prior allocation that has received certification for Zero Energy Ready or Passive House Standards. Provide certification at Tab P. See Manual for details and requirements.

3. Universal Design - Units Meeting Universal Design Standards (units must be shown on Plans)

- TRUE a. Architect of record certifies that units will be constructed to meet Virginia Housing's Universal Design Standards.
- 5 b. Number of Rental Units constructed to meet Virginia Housing's Universal Design standards:  
10% of Total Rental Units

No Market Units listed on Structure 1a.

- 4.  FALSE Market-rate units' amenities are substantially equivalent to those of the low income units.

If not, please explain:

Architect of Record initial here that the above information is accurate per certification statement within this application.

**I. UTILITIES**

1. Utilities Types:

- a. Heating Type Electric Forced Air
- b. Cooking Type Electric
- c. AC Type Central Air
- d. Hot Water Type Electric

2. Indicate True if the following services will be included in Rent:

- |                     |              |                |              |
|---------------------|--------------|----------------|--------------|
| Water?              | <u>FALSE</u> | Heat?          | <u>TRUE</u>  |
| Hot Water?          | <u>TRUE</u>  | AC?            | <u>TRUE</u>  |
| Lighting/ Electric? | <u>TRUE</u>  | Sewer?         | <u>FALSE</u> |
| Cooking?            | <u>TRUE</u>  | Trash Removal? | <u>FALSE</u> |

Utilities	Enter Allowances by Bedroom Size				
	0-BR	1-BR	2-BR	3-BR	4-BR
Heating	0	0	26	0	0
Air Conditioning	0	0	25	0	0
Cooking	0	0	16	0	0
Lighting	0	0	16	0	0
Hot Water	0	0	16	0	0
Water	0	0	0	0	0
Sewer	0	0	0	0	0
Trash	0	0	0	0	0
Total utility allowance for costs paid by tenant	\$0	\$0	\$99	\$0	\$0

3. The following sources were used for Utility Allowance Calculation (Provide documentation **TAB R**).

- a. FALSE HUD
- b. FALSE Utility Company (Estimate)
- c. FALSE Utility Company (Actual Survey)
- d. FALSE Local PHA
- e. TRUE Other: Green Consultant - Lorax

**Warning:** The Virginia Housing housing choice voucher program utility schedule shown on VirginiaHousing.com should not be used unless directed to do so by the local housing authority.

**K. SPECIAL HOUSING NEEDS**

**NOTE:** Any Applicant commits to providing first preference to members of targeted populations having state rental assistance and will not impose any eligibility requirements or lease terms for such individuals that are more restrictive than its standard requirements and terms, the terms of the MOU establishing the target population, or the eligibility requirements for the state rental assistance.

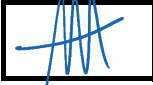
1. **Accessibility:** Indicate **True** for the following point category, as appropriate.

**Action:** Provide appropriate documentation (**Tab X**)

**TRUE**

Any development in which ten percent (10%) of the total units (i) conform to HUD regulations interpreting the accessibility requirements of section 504 of the Rehabilitation Act and (ii) are actively marketed to persons with disabilities as defined in the Fair Housing Act in accordance with a plan submitted as part of the application for credits.

**All common space must also conform to HUD regulations interpreting the accessibility requirements of section 504 of the Rehabilitation Act.**



**Architect of Record initial here that the above information is accurate per certification statement within this application.**

2. **Special Housing Needs/Leasing Preference:**

a. If not general population, select applicable special population:

**FALSE**

Elderly (as defined by the United States Fair Housing Act.)

**FALSE**

Persons with Disabilities (must meet the requirements of the Federal Americans with Disabilities Act) - Accessible Supportive Housing Pool only

**FALSE**

Supportive Housing (as described in the Tax Credit Manual)

**FALSE**

If Supportive Housing is True: Will the supportive housing consist of units designated for tenants that are homeless or at risk of homelessness?

**Action:** Provide Permanent Supportive Housing Certification (**Tab S**)

b. The development has existing tenants and a relocation plan has been developed.

**TRUE**

(If **True**, Virginia Housing policy requires that the impact of economic and/or physical displacement on those tenants be minimized, in which Owners agree to abide by the Authority's Relocation Guidelines for LIHTC properties as described in the manual.)

**Action:** Provide Relocation Plan, Budget and Unit Delivery Schedule (**Mandatory if tenants are displaced - Tab J**)

**K. SPECIAL HOUSING NEEDS**

**3. Leasing Preferences**

a. Will leasing preference be given to applicants on a public housing waiting list and/or Section 8 waiting list? select: Yes

Organization which holds waiting list: Virginia Housing

Contact person: Cassandra Dixon Barksdale

Title: Program Administrator

Phone Number: (434) 572-9556

**Action:** Provide required notification documentation **(TAB L)**

b. Leasing preference will be given to individuals and families with children. FALSE  
(Less than or equal to 20% of the units must have of 1 or less bedrooms).

c. Specify the number of low-income units that will serve individuals and families with children by providing three or more bedrooms: 0  
% of total Low Income Units 0%

**NOTE:** Development must utilize a **Virginia Housing Certified Management Agent**. Proof of management certification must be provided before 8609s are issued.

[Download Current CMA List from VirginiaHousing.com](#)

**Action:** Provide documentation of tenant disclosure regarding Virginia Housing Rental Education **(Mandatory - Tab U)**

**4. Target Population Leasing Preference**

Unless prohibited by an applicable federal subsidy program, each applicant shall commit to provide a leasing preference to individuals (i) in a target population identified in a memorandum of understanding between the Authority and one or more participating agencies of the Commonwealth, (ii) having a voucher or other binding commitment for rental assistance from the Commonwealth, and (iii) referred to the development by a referring agent approved by the Authority. The leasing preference shall not be applied to more than ten percent (10%) of the total units in the development at any given time. The applicant may not impose tenant selection criteria or leasing terms with respect to individuals receiving this preference that are more restrictive than the applicant’s tenant selection criteria or leasing terms applicable to prospective tenants in the development that do not receive this preference, the eligibility criteria for the rental assistance from the Commonwealth, or any eligibility criteria contained in a memorandum of understanding between the Authority and one or more participating agencies of the Commonwealth.

**Primary Contact for Target Population leasing preference.** The agency will contact as needed.

First Name: Ari

Last Name: Severe

Phone Number: (240) 683-0300 Email: asevere@tmamgroup.com

**K. SPECIAL HOUSING NEEDS**

**5. Rental Assistance**

a. Some of the low-income units do or will receive rental assistance..... TRUE

b. Indicate True if rental assistance will be available from the following

- FALSE Rental Assistance Demonstration (RAD) or other PHA conversion to project based rental assistance.
- FALSE Section 8 New Construction Substantial Rehabilitation
- FALSE Section 8 Moderate Rehabilitation
- FALSE Section 811 Certificates
- FALSE Section 8 Project Based Assistance
- TRUE RD 515 Rental Assistance
- FALSE Section 8 Vouchers  
\*Administering Organization: \_\_\_\_\_
- FALSE State Assistance  
\*Administering Organization: \_\_\_\_\_
- FALSE Other: \_\_\_\_\_

c. The Project Based vouchers above are applicable to the 30% units seeking points.

FALSE

i. If True above, how many of the 30% units will not have project based vouchers? 0

d. Number of units receiving assistance:	<u>46</u>
How many years in rental assistance contract?	<u>1.00</u>
Expiration date of contract:	<u>12/31/2026</u>
There is an Option to Renew.	<u>TRUE</u>

**Action:** Contract or other agreement provided **(TAB Q)**.

**6. Public Housing Revitalization**

Is this development replacing or revitalizing Public Housing Units? FALSE

If so, how many existing Public Housing units? 0

**L. UNIT DETAILS**

**1. Set-Aside Election:**

**UNITS SELECTED IN INCOME AND RENT DETERMINE POINTS FOR THE BONUS POINT CATEGORY**

Note: In order to qualify for any tax credits, a development must meet one of three minimum threshold occupancy tests. Either (i) at least 20% of the units must be rent-restricted and occupied by persons whose incomes are 50% or less of the area median income adjusted for family size (this is called the 20/50 test), (ii) at least 40% of the units must be rent-restricted and occupied by persons whose incomes are 60% or less of the area median income adjusted for family size (this is called the 40/60 test), or (iii) 40% or more of the units are both rent-restricted and occupied by persons whose income does not exceed the imputed income limitation designated in 10% increments between 20% to 80% of the AMI, and the average of the imputed income limitations collectively does not exceed 60% of the AMI (this is called the Average Income Test (AIT)). All occupancy tests are described in Section 42 of the IRC. Rent-and income-restricted units are known as low-income units. If you have more low-income units than required, you qualify for more credits. If you serve lower incomes than required, you receive more points under the ranking system.

**a. Units Provided Per Household Type:**

Income Levels		
# of Units	% of Units	
0	0.00%	20% Area Median
0	0.00%	30% Area Median
8	16.67%	40% Area Median
16	33.33%	50% Area Median
24	50.00%	60% Area Median
0	0.00%	70% Area Median
0	0.00%	80% Area Median
0	0.00%	Market Units
48	100.00%	<b>Total</b>

Rent Levels		
# of Units	% of Units	
0	0.00%	20% Area Median
0	0.00%	30% Area Median
8	16.67%	40% Area Median
16	33.33%	50% Area Median
24	50.00%	60% Area Median
0	0.00%	70% Area Median
0	0.00%	80% Area Median
0	0.00%	Market Units
48	100.00%	<b>Total</b>

b. Indicate that you are electing to receive points for the following deeper targets shown in the chart above and those targets will be reflected in the set-aside requirements within the Extended Use Agreement.

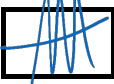
20-30% Levels  FALSE      40% Levels  TRUE      50% levels  TRUE

c. The development plans to utilize average income testing.....  FALSE

**2. Unit Mix Grid**

**FOR YOUR CONVENIENCE, COPY AND PASTE IS ALLOWED WITHIN UNIT MIX GRID**

In the following grid, add a row for each unique unit type planned within the development. Enter the appropriate data for both tax credit and market rate units.

 Architect of Record initial here that the information below is accurate per certification statement within this application.

	Unit Type (Select One)	Rent Target (Select One)	Number of Units	# of Units 504 compliant	Net Rentable Square Feet	Monthly Rent Per Unit	Total Monthly Rent
Mix 1	2 BR - 1 Bath	60% AMI	2		723.00	\$1,339.00	\$2,678
Mix 2	2 BR - 1 Bath	40% AMI	8	4	723.00	\$1,550.00	\$12,400
Mix 3	2 BR - 1 Bath	50% AMI	16	1	723.00	\$1,550.00	\$24,800
Mix 4	2 BR - 1 Bath	60% AMI	22		723.00	\$1,550.00	\$34,100
Mix 5							\$0
Mix 6							\$0
Mix 7							\$0
Mix 8							\$0
Mix 9							\$0
Mix 10							\$0

L. UNIT DETAILS

Mix 11									\$0
Mix 12									\$0
Mix 13									\$0
Mix 14									\$0
Mix 15									\$0
Mix 16									\$0
Mix 17									\$0
Mix 18									\$0
Mix 19									\$0
Mix 20									\$0
Mix 21									\$0
Mix 22									\$0
Mix 23									\$0
Mix 24									\$0
Mix 25									\$0
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Mix 61									\$0
Mix 62									\$0
Mix 63									\$0
Mix 64									\$0
Mix 65									\$0
Mix 66									\$0
Mix 67									\$0

**L. UNIT DETAILS**

Mix 68								\$0
Mix 69								\$0
Mix 70								\$0
Mix 71								\$0
Mix 72								\$0
Mix 73								\$0
Mix 74								\$0
Mix 75								\$0
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Mix 77								\$0
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Mix 79								\$0
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Mix 82								\$0
Mix 83								\$0
Mix 84								\$0
Mix 85								\$0
Mix 86								\$0
Mix 87								\$0
Mix 88								\$0
Mix 89								\$0
Mix 90								\$0
Mix 91								\$0
Mix 92								\$0
Mix 93								\$0
Mix 94								\$0
Mix 95								\$0
Mix 96								\$0
Mix 97								\$0
Mix 98								\$0
Mix 99								\$0
Mix 100								\$0
<b>TOTALS</b>			48	5				\$73,978

<b>Total Units</b>	<b>48</b>	<b>Net Rentable SF:</b>	<b>TC Units</b>	<b>34,704.00</b>
			<b>MKT Units</b>	<b>0.00</b>
			<b>Total NR SF:</b>	<b>34,704.00</b>

<b>Floor Space Fraction (to 7 decimals)</b>	<b>100.00000%</b>
---	-------------------

**M. OPERATING EXPENSES**

**Administrative:**

Use Whole Numbers Only!

1. Advertising/Marketing			\$1,250
2. Office Salaries			\$0
3. Office Supplies			\$5,000
4. Office/Model Apartment	(type _____ )		\$0
5. Management Fee			\$55,175
<u>6.66%</u> of EGI	<u>\$1,149.48</u>	Per Unit	
6. Manager Salaries			\$61,212
7. Staff Unit (s)	(type _____ )		\$0
8. Legal			\$0
9. Auditing			\$7,750
10. Bookkeeping/Accounting Fees			\$0
11. Telephone & Answering Service			\$5,969
12. Tax Credit Monitoring Fee			\$0
13. Miscellaneous Administrative			\$10,200
<b>Total Administrative</b>			<b>\$146,556</b>

**Utilities**

14. Fuel Oil			\$0
15. Electricity			\$7,024
16. Water			\$24,250
17. Gas			\$0
18. Sewer			\$21,601
<b>Total Utility</b>			<b>\$52,875</b>

**Operating:**

19. Janitor/Cleaning Payroll			\$0
20. Janitor/Cleaning Supplies			\$0
21. Janitor/Cleaning Contract			\$0
22. Exterminating			\$5,376
23. Trash Removal			\$9,491
24. Security Payroll/Contract			\$0
25. Grounds Payroll			\$0
26. Grounds Supplies			\$0
27. Grounds Contract			\$9,500
28. Maintenance/Repairs Payroll			\$51,500
29. Repairs/Material			\$4,800
30. Repairs Contract			\$4,800
31. Elevator Maintenance/Contract			\$0
32. Heating/Cooling Repairs & Maintenance			\$750
33. Pool Maintenance/Contract/Staff			\$0
34. Snow Removal			\$900
35. Decorating/Payroll/Contract			\$1,250
36. Decorating Supplies			\$0
37. Miscellaneous			\$0
<b>Totals Operating &amp; Maintenance</b>			<b>\$88,367</b>

**M. OPERATING EXPENSES**

**Taxes & Insurance**

38. Real Estate Taxes		\$25,943
39. Payroll Taxes		\$10,690
40. Miscellaneous Taxes/Licenses/Permits		\$267
41. Property & Liability Insurance	\$600 per unit	\$28,800
42. Fidelity Bond		\$275
43. Workman's Compensation		\$1,898
44. Health Insurance & Employee Benefits		\$11,144
45. Other Insurance		\$0
<b>Total Taxes &amp; Insurance</b>		<b>\$79,017</b>

**Total Operating Expense**

**\$366,815**

**Total Operating Expenses Per Unit**

**\$7,642**

**C. Total Operating Expenses as % of EGI**

**44.25%**

**Replacement Reserves (Total # Units X \$300 or \$250 New Const./Elderly Minimum)**

**\$25,200**

**Total Expenses**

**\$392,015**

**N. PROJECT BUDGET - HARD COSTS**

**Cost/Basis/Maximum Allowable Credit**

Complete cost column and basis column(s) as appropriate

To select exclusion of allowable line items from Total Development Costs used in Cost limit calculations, select X in yellow box to the left.

Note: Attorney must opine, among other things, as to correctness of the inclusion of each cost item in eligible basis, type of credit and numerical calculations included in Project Budget.

		Amount of Cost up to 100% Includable in Eligible Basis--Use Applicable Column(s):		
		"30% Present Value Credit"		(D)
		(A) Cost	(B) Acquisition	(C) Rehab/ New Construction
<b>Must Use Whole Numbers Only!</b>				
<b>1. Contractor Cost</b>				
a. Unit Structures (New)	0	0	0	0
b. Unit Structures (Rehab)	6,823,815	0	0	6,823,815
c. Non Residential Structures	0	0	0	0
d. Commercial Space Costs	0	0	0	0
<input type="checkbox"/> e. Structured Parking Garage	0	0	0	0
<b>Total Structure</b>	6,823,815	0	0	6,823,815
f. Earthwork	0	0	0	0
g. Site Utilities	0	0	0	0
<input type="checkbox"/> h. Renewable Energy	0	0	0	0
i. Roads & Walks	0	0	0	0
j. Site Improvements	480,000	0	0	480,000
k. Lawns & Planting	0	0	0	0
l. Engineering	0	0	0	0
m. Off-Site Improvements	0	0	0	0
n. Site Environmental Mitigation	0	0	0	0
o. Demolition	0	0	0	0
p. Site Work	0	0	0	0
q. Hard Cost Contingency	0	0	0	0
<b>Total Land Improvements</b>	480,000	0	0	480,000
<b>Total Structure and Land</b>	7,303,815	0	0	7,303,815
r. General Requirements	282,065	0	0	282,065
s. Builder's Overhead ( 1.3% Contract)	94,022	0	0	94,022
t. Builder's Profit ( 3.9% Contract)	282,065	0	0	282,065
u. Bonds	72,162	0	0	72,162
v. Building Permits	96,216	0	0	96,216
w. Special Construction	0	0	0	0
x. Special Equipment	0	0	0	0
y. Other 1: <input type="checkbox"/>	0	0	0	0
z. Other 2: <input type="checkbox"/>	0	0	0	0
aa. Other 3: <input type="checkbox"/>	0	0	0	0
<b>Contractor Costs</b>	<b>\$8,130,345</b>	<b>\$0</b>	<b>\$0</b>	<b>\$8,130,345</b>

**Construction cost per unit: \$169,382.19**

**MAXIMUM COMBINED GR, OVERHEAD & PROFIT =**

**\$1,022,534**

**ACTUAL COMBINED GR, OVERHEAD & PROFIT =**

**\$658,152**

**O. PROJECT BUDGET - OWNER COSTS**

To select exclusion of allowable line items from Total Development Costs used in Cost limit calculations, select X in yellow box to the left.

Item	(A) Cost	Amount of Cost up to 100% Includable in Eligible Basis--Use Applicable Column(s):		
		"30% Present Value Credit"		(D)
		(B) Acquisition	(C) Rehab/ New Construction	"70 % Present Value Credit"
<b>2. Owner Costs</b>				
a. Building Permit	0	0	0	0
b. Architecture/Engineering Design Fee \$5,313 /Unit)	255,000	0	0	255,000
c. Architecture Supervision Fee \$625 /Unit)	30,000	0	0	30,000
d. Tap Fees	0	0	0	0
e. Environmental	12,500	11,334	0	0
f. Soil Borings	0	0	0	0
g. Green Building (Earthcraft, LEED, etc.)	50,000	0	0	50,000
h. Appraisal	12,500	0	0	12,500
i. Market Study	12,500	6,801	0	0
j. Site Engineering / Survey	15,000	13,601	0	0
k. Construction/Development Mgt	0	0	0	0
l. Structural/Mechanical Study	0	0	0	0
m. Construction Loan Origination Fee	80,551	0	0	80,551
n. Construction Interest ( 0.0% for 0 months)	561,986	0	0	0
o. Taxes During Construction	0	0	0	0
p. Insurance During Construction	38,486	0	0	38,486
q. Permanent Loan Fee ( 0.0% )	164,100			
r. Other Permanent Loan Fees	0			
s. Letter of Credit	0	0	0	0
t. Cost Certification Fee	30,000	4,600	0	25,000
u. Accounting	0	0	0	0
v. Title and Recording	65,000	42,617	0	18,000
w. Legal Fees for Closing	105,000	9,067	0	95,055
x. Mortgage Banker	85,000	0	0	0
y. Tax Credit Fee	67,500			
z. Tenant Relocation	192,000			
aa. Fixtures, Furnitures and Equipment	40,000	0	0	40,000
ab. Organization Costs	0			
ac. Operating Reserve	385,608			
ad. Soft Costs Contingency	72,000			
ae. Security	0	0	0	0
af. Utilities	0	0	0	0
ag. Supportive Service Reserves	0			

**O. PROJECT BUDGET - OWNER COSTS**

(1) Other* specify: Termite	10,000	0	0	10,000
(2) Other* specify: CNA	12,500	0	0	12,500
(3) Other* specify: Perm Legal	45,000	0	0	0
(4) Other* specify: Lease-Up Reserve	60,000	0	0	0
(5) Other* specify:		0	0	
(6) Other* specify:		0	0	
(7) Other* specify:	0	0	0	0
(8) Other* specify:	0	0	0	0
(9) Other* specify:	0	0	0	0
<b>Owner Costs Subtotal (Sum 2A..2(10))</b>	<b>\$2,402,231</b>	<b>\$88,020</b>	<b>\$0</b>	<b>\$667,092</b>
<b>Subtotal 1 + 2</b> (Owner + Contractor Costs)	<b>\$10,532,576</b>	<b>\$88,020</b>	<b>\$0</b>	<b>\$8,797,437</b>
<b>3. Developer's Fees</b>	<b>1,599,006</b>	<b>0</b>	<b>0</b>	<b>1,599,006</b>
<b>4. Owner's Acquisition Costs</b>				
Land	360,000			
Existing Improvements	3,720,000	3,740,538		
Subtotal 4:	\$4,080,000	\$3,740,538		
<b>5. Total Development Costs</b>				
Subtotal 1+2+3+4:	\$16,211,582	\$3,828,558	\$0	\$10,396,443

If this application seeks rehab credits only, in which there is no acquisition and **no change in ownership**, enter the greater of appraised value or tax assessment value here:

(Provide documentation at **Tab E**)

\$0	Land
\$0	Building

**Maximum Developer Fee:**

**\$1,599,006**

Proposed Development's Cost per Sq Foot  
Applicable Cost Limit by Square Foot:

\$306 **Meets Limits**  
\$417

Proposed Development's Cost per Unit  
Applicable Cost Limit per Unit:

\$252,741 **Meets Limits**  
\$504,522

**P. ELIGIBLE BASIS CALCULATION**

Item	Amount of Cost up to 100% Includable in Eligible Basis--Use Applicable Column(s):			
	(A) Cost	"30 % Present Value Credit"		(D) "70 % Present Value Credit"
		(B) Acquisition	(C) Rehab/ New Construction	
<b>1. Total Development Costs</b>	16,211,582	3,828,558	0	10,396,443
<b>2. Reductions in Eligible Basis</b>				
a. Amount of federal grant(s) used to finance qualifying development costs		0	0	0
b. Amount of nonqualified, nonrecourse financing		0	0	0
c. Costs of nonqualifying units of higher quality (or excess portion thereof)		0	0	0
d. Historic Tax Credit (residential portion)		0	0	0
<b>3. Total Eligible Basis (1 - 2 above)</b>		3,828,558	0	10,396,443
<b>4. Adjustment(s) to Eligible Basis (For non-acquisition costs in eligible basis)</b>				
a. For QCT or DDA (Eligible Basis x 30%) <i>State Designated Basis Boosts:</i>			0	0
b. For Revitalization or Supportive Housing (Eligible Basis x 30%)			0	3,118,933
c. For Green Certification (Eligible Basis x 10%)				0
<b>Total Adjusted Eligible basis</b>			0	13,515,376
<b>5. Applicable Fraction</b>		100.00000%	100.00000%	100.00000%
<b>6. Total Qualified Basis</b> (Eligible Basis x Applicable Fraction)		3,828,558	0	13,515,376
<b>7. Applicable Percentage</b>		4.00%	4.00%	9.00%
<b>8. Maximum Allowable Credit under IRC §42</b> (Qualified Basis x Applicable Percentage)		\$153,142	\$0	\$1,216,384
(Must be same as BIN total and equal to or less than credit amount allowed)		\$1,369,526 Combined 30% & 70% P. V. Credit		

**Q. SOURCES OF FUNDS**

**Action:** Provide Documentation for all Funding Sources at **Tab T**

**1. Construction Financing:** List individually the sources of construction financing, including any such loans financed through grant sources:

Source of Funds	Date of Application	Date of Commitment	Amount of Funds	Name of Contact Person
1. Enterprise			\$2,660,345	Ugonna Oniovokuko
2. RD 538			\$5,470,000	Bob Morton
3.				
Total Construction Funding:			\$8,130,345	

**2. Permanent Financing:** List individually the sources of all permanent financing in order of lien position:

Source of Funds	Date of Application	Date of Commitment	<i>(Whole Numbers only)</i>		Interest Rate of Loan	Amortization Period IN YEARS	Term of Loan (years)
			Amount of Funds	Annual Debt Service Cost			
1. USDA RD			\$257,115	\$6,537	1.00%	50	30
2. VHTF			\$2,000,000		0.00%	30	30
3. RD 538			\$5,470,000	\$372,664	6.25%	40	40
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							
13.							
14.							
15.							
16.							
17.							
18.							
19.							
20.							
Total Permanent Funding:			\$7,727,115	\$379,201			

**Q. SOURCES OF FUNDS**

**3. Grants:** List all grants provided for the development:

	Source of Funds	Date of Application	Date of Commitment	Amount of Funds	Name of Contact Person
1.					
2.					
3.					
4.					
5.					
6.					
Total Permanent Grants:				\$0	

**4. Subsidized Funding**

	Source of Funds	Date of Commitment	Amount of Funds
1.			\$0
2.			
3.			
4.			
5.			
Total Subsidized Funding			\$0

**5. Recap of Federal, State, and Local Funds**

Portions of the sources of funds described above for the development are financed directly or indirectly with Federal, State, or Local Government Funds. **FALSE**

If above is **True**, then list the amount of money involved by all appropriate types.

Below-Market Loans

a.	Tax Exempt Bonds	\$0
b.	RD 515	\$257,115
c.	Section 221(d)(3)	\$0
d.	Section 312	\$0
e.	Section 236	\$0
f.	Virginia Housing REACH Funds	\$0
g.	HOME Funds	\$0
h.	Choice Neighborhood	\$0
i.	National Housing Trust Fund	\$0
j.	Virginia Housing Trust Fund	\$2,000,000
k.	Other:	\$0
l.	Other:	\$0

Market-Rate Loans

a.	Taxable Bonds	\$0
b.	Section 220	\$0
c.	Section 221(d)(3)	\$0
d.	Section 221(d)(4)	\$0
e.	Section 236	\$0
f.	Section 223(f)	\$0
g.	Other:	\$0

**Q. SOURCES OF FUNDS**

Grants\*

a.	CDBG	\$0
b.	UDAG	\$0

Grants

c.	State	
d.	Local	
e.	Other:	

\*This means grants to the partnership. If you received a loan financed by a locality which received one of the listed grants, please list it in the appropriate loan column as "other" and describe the applicable grant program which funded it.

**6. For Transactions Using Tax-Exempt Bonds Seeking 4% Credits:**

For purposes of the Bond Cliff Test, and based only on the data entered to this application, the portion of the aggregate basis of buildings and land financed with tax-exempt funds is: N/A

7. Some of the development's financing has credit enhancements. FALSE

If **True**, list which financing and describe the credit enhancement:


**8. Other Subsidies** **Action:** Provide documentation (**Tab Q**)

- a. FALSE Real Estate Tax Abatement on the increase in the value of the development.
- b. FALSE **New** project based subsidy from HUD or Rural Development or any other binding federal project based subsidy  
0 Number of New PBV Vouchers
- c. FALSE Other

9. A HUD approval for transfer of physical asset is required. FALSE

**R. EQUITY**

**1. Equity**

a. Portion of Syndication Proceeds Attributable to Historic Tax Credit			
Amount of Federal historic credits	\$0	x Equity \$	\$0.000 = \$0
Amount of Virginia historic credits	\$0	x Equity \$	\$0.000 = \$0
b. Housing Opportunity Tax Credit Request (paired with 4% credit requests only)			
i. Requested Annual HOTC Credits	\$0		
ii. 10 Year HOTC Credit Amount	\$0		
iii. Equity Dollars Per Credit	\$0.000		
iv. Percent of ownership entity (repeated from 3b)	99.99000%		
v. HOTC Credit Net	\$0		
c. Equity that Sponsor will Fund:			
i. Cash Investment	\$0		
ii. Contributed Land/Building	\$0		
iii. Deferred Developer Fee	\$694,467	(Note: Deferred Developer Fee cannot be negative.)	
v. Other:	\$0		
<b>ACTION:</b> If Deferred Developer Fee is greater than 50% of overall Developer Fee, provide a cash flow statement showing payoff within 15 years at <b>TAB A.</b>			
<b>Equity Total</b>	<u>\$694,467</u>		

**2. Equity Gap Calculation**

a. Total Development Cost	\$16,211,582
b. Total of Permanent Funding, Grants and Equity	- \$8,421,582
c. Equity Gap	\$7,790,000
d. Developer Equity	- \$779
e. Equity gap to be funded with low-income tax credit proceeds	\$7,789,221

**3. Syndication Information (If Applicable)**

a. Actual or Anticipated Name of Syndicator:	▶ Virginia Community Development Corporation (VCDC)		
Contact Person:	Steve Bleile	Phone:	(804) 482-6231
Street Address:	115 South 15th Street, Suite 501		
City:	Richmond	State:	Virginia
		Zip:	23219

b. Syndication Equity	
i. Anticipated Annual Credits	\$950,000.00
ii. Equity Dollars Per Credit (e.g., \$0.85 per dollar of credit)	\$0.820
iii. Percent of ownership entity (e.g., 99% or 99.9%)	99.99000%
iv. Syndication costs not included in Total Development Costs (e.g., advisory fees)	\$0
v. Net credit amount anticipated by user of credits	\$949,905
vi. Total to be paid by anticipated users of credit (e.g., limited partners)	\$7,789,221

**Action:** Provide Syndicator's or Investor's signed Letter of Intent (Mandatory at Tab C)

<b>4. Net Syndication Amount</b>	<u>\$7,789,221</u>
Which will be used to pay for Total Development Costs	
<b>5. Net Equity Factor</b>	<u>82.0000000000%</u>

**S. DETERMINATION OF RESERVATION AMOUNT NEEDED**

The following calculation of the amount of credits needed is substantially the same as the calculation which will be made by Virginia Housing to determine, as required by the IRC, the amount of credits which may be allocated for the development. However, Virginia Housing at all times retains the right to substitute such information and assumptions as are determined by Virginia Housing to be reasonable for the information and assumptions provided herein as to costs (including development fees, profits, etc.), sources for funding, expected equity, etc. Accordingly, if the development is selected by Virginia Housing for a reservation of credits, the amount of such reservation may differ significantly from the amount you compute below.

1. Total Development Costs		<u>\$16,211,582</u>
2. Less Total of Permanent Funding, Grants and Equity	-	<u>\$8,421,582</u>
3. Equals Equity Gap		<u>\$7,790,000</u>
4. Divided by Net Equity Factor (Percent of 10-year credit expected to be raised as equity investment)		<u>82.0000000000%</u>
5. Equals Ten-Year Credit Amount Needed to Fund Gap		<u>\$9,500,000</u>
Divided by ten years		<u>10</u>
6. Equals Annual Tax Credit Required to Fund the Equity Gap		<u>\$950,000</u>
7. Maximum Allowable Credit Amount (from Eligible Basis Calculation)		<u>\$1,369,526</u>
8. Requested Credit Amount	For 30% PV Credit:	<u>\$0</u>
	For 70% PV Credit:	<u>\$950,000</u>
Credit per LI Units	<u>\$19,791.6667</u>	
Credit per LI Bedroom	<u>\$9,895.8333</u>	
	<b>Combined 30% &amp; 70% PV Credit Requested</b>	<b>\$950,000</b>

9. **Action:** Provide Attorney’s Opinion using Virginia Housing template (**Mandatory Tab H**)

**T. CASH FLOW**

**1. Revenue**

Indicate the estimated monthly income for the **Low-Income Units** (based on Unit Details tab):

Total Monthly Rental Income for LIHTC Units		\$73,978
Plus Other Income Source (list):	NSF and Late Charges	\$295
Equals Total Monthly Income:		\$74,273
Twelve Months		x12
Equals Annual Gross Potential Income		\$891,276
Less Vacancy Allowance	7.0%	\$62,389
<b>Equals Annual Effective Gross Income (EGI) - Low Income Units</b>		<b>\$828,887</b>

**2. Indicate the estimated monthly income for the Market Rate Units** (based on Unit Details tab):

Total Monthly Income for Market Rate Units:		\$0
Plus Other Income Source (list):		\$0
Equals Total Monthly Income:		\$0
Twelve Months		x12
Equals Annual Gross Potential Income		\$0
Less Vacancy Allowance	7.0%	\$0
<b>Equals Annual Effective Gross Income (EGI) - Market Rate Units</b>		<b>\$0</b>

**Action:** Provide documentation in support of Operating Budget (**TAB R**)

**3. Cash Flow (First Year)**

a.	Annual EGI Low-Income Units	\$828,887
b.	Annual EGI Market Units	\$0
c.	Total Effective Gross Income	\$828,887
d.	Total Expenses	\$392,015
e.	Net Operating Income	\$436,872
f.	Total Annual Debt Service	\$379,201
g.	Cash Flow Available for Distribution	\$57,671

T. CASH FLOW

4. Projections for Financial Feasibility - 15 Year Projections of Cash Flow

	Stabilized Year 1	Year 2	Year 3	Year 4	Year 5
Eff. Gross Income	828,887	845,464	862,374	879,621	897,214
Less Oper. Expenses	392,015	403,775	415,889	428,365	441,216
Net Income	436,872	441,689	446,485	451,256	455,997
Less Debt Service	379,201	379,201	379,201	379,201	379,201
Cash Flow	57,671	62,488	67,284	72,055	76,796
Debt Coverage Ratio	1.15	1.16	1.18	1.19	1.20

	Year 6	Year 7	Year 8	Year 9	Year 10
Eff. Gross Income	915,158	933,461	952,130	971,173	990,596
Less Oper. Expenses	454,453	468,086	482,129	496,593	511,491
Net Income	460,705	465,375	470,001	474,580	479,106
Less Debt Service	379,201	379,201	379,201	379,201	379,201
Cash Flow	81,504	86,174	90,800	95,379	99,905
Debt Coverage Ratio	1.21	1.23	1.24	1.25	1.26

	Year 11	Year 12	Year 13	Year 14	Year 15
Eff. Gross Income	1,010,408	1,030,616	1,051,229	1,072,253	1,093,698
Less Oper. Expenses	526,835	542,640	558,920	575,687	592,958
Net Income	483,573	487,976	492,309	496,566	500,741
Less Debt Service	379,201	379,201	379,201	379,201	379,201
Cash Flow	104,372	108,775	113,108	117,365	121,540
Debt Coverage Ratio	1.28	1.29	1.30	1.31	1.32

Estimated Annual Percentage Increase in Revenue 2.00% (Must be < 2%)  
 Estimated Annual Percentage Increase in Expenses 3.00% (Must be > 3%)

**U. Building-by-Building Information**

**Must Complete**

Qualified basis must be determined on a building-by building basis. Complete the section below. Building street addresses are required by the IRS (must have them by the time of allocation request).

Number of BINS: 5

**FOR YOUR CONVENIENCE, COPY AND PASTE IS ALLOWED WITHIN BUILDING GRID**

Bldg #	BIN if known	NUMBER OF		Please help us with the process: DO NOT use the CUT feature DO NOT SKIP LINES BETWEEN BUILDINGS					30% Present Value Credit for Acquisition				30% Present Value Credit for Rehab / New Construction				70% Present Value Credit				
		TAX CREDIT UNITS	MARKET RATE UNITS						Estimate Qualified Basis	Actual or Anticipated In-Service Date	Applicable Percentage	Credit Amount	Estimate Qualified Basis	Actual or Anticipated In-Service Date	Applicable Percentage	Credit Amount	Estimate Qualified Basis	Actual or Anticipated In-Service Date	Applicable Percentage	Credit Amount	
		Street Address 1	Street Address 2	City	State	Zip															
1.	VA0003002	9	0	210 A-D & 212 A-D Burton Woods		Williamsburg	VA	23188	\$765,712	10/31/27	4.00%	\$30,628					\$0	\$2,703,076	07/31/28	9.00%	\$243,277
2.	VA0003003	9	0	210 A-D & 212 A-D Burton Woods		Williamsburg	VA	23188	\$765,712	10/31/27	4.00%	\$30,628					\$0	\$2,703,075	07/31/28	9.00%	\$243,277
3.	VA0003001	10	0	210 A-D & 212 A-D Burton Woods		Williamsburg	VA	23188	\$765,712	10/31/27	4.00%	\$30,628					\$0	\$2,703,075	07/31/28	9.00%	\$243,277
4.	VA0003005	10	0	210 A-D & 212 A-D Burton Woods		Williamsburg	VA	23188	\$765,711	10/31/27	4.00%	\$30,628					\$0	\$2,703,075	07/31/28	9.00%	\$243,277
5.	VA0003004	10	0	210 A-D & 212 A-D Burton Woods		Williamsburg	VA	23188	\$765,711	10/31/27	4.00%	\$30,628					\$0	\$2,703,075	07/31/28	9.00%	\$243,277
6.												\$0					\$0				\$0
7.												\$0					\$0				\$0
8.												\$0					\$0				\$0
9.												\$0					\$0				\$0
10.												\$0					\$0				\$0
11.												\$0					\$0				\$0
12.												\$0					\$0				\$0
13.												\$0					\$0				\$0
14.												\$0					\$0				\$0
15.												\$0					\$0				\$0
16.												\$0					\$0				\$0
17.												\$0					\$0				\$0
18.												\$0					\$0				\$0
19.												\$0					\$0				\$0
20.												\$0					\$0				\$0
21.												\$0					\$0				\$0
22.												\$0					\$0				\$0
23.												\$0					\$0				\$0
24.												\$0					\$0				\$0
25.												\$0					\$0				\$0
26.												\$0					\$0				\$0
27.												\$0					\$0				\$0
28.												\$0					\$0				\$0
29.												\$0					\$0				\$0
30.												\$0					\$0				\$0
31.												\$0					\$0				\$0
32.												\$0					\$0				\$0
33.												\$0					\$0				\$0
34.												\$0					\$0				\$0
35.												\$0					\$0				\$0

48 0 If development has more than 35 buildings, contact Virginia Housing.

Totals from all buildings

\$3,828,558

\$153,142

\$0

\$0

\$13,515,376

\$1,216,384

Number of BINS: 5

**V. STATEMENT OF OWNER**

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The undersigned hereby acknowledges the following:


1. that, to the best of its knowledge and belief, all factual information provided herein or in connection herewith is true and correct, and all estimates are reasonable.
2. that it will at all times indemnify and hold harmless Virginia Housing and its assigns against all losses, costs, damages, Virginia Housing's expenses, and liabilities of any nature directly or indirectly resulting from, arising out of, or relating to Virginia Housing's acceptance, consideration, approval, or disapproval of this reservation request and the issuance or nonissuance of an allocation of credits, grants and/or loan funds in connection herewith.
3. that points will be assigned only for representations made herein for which satisfactory documentation is submitted herewith and that no revised representations may be made in connection with this application once the deadline for applications has passed.
4. that this application form, provided by Virginia Housing to applicants for tax credits, including all sections herein relative to basis, credit calculations, and determination of the amount of the credit necessary to make the development financially feasible, is provided only for the convenience of Virginia Housing in reviewing reservation requests; that completion hereof in no way guarantees eligibility for the credits or ensures that the amount of credits applied for has been computed in accordance with IRC requirements; and that any notations herein describing IRC requirements are offered only as general guides and not as legal authority.
5. that the undersigned is responsible for ensuring that the proposed development will be comprised of qualified low-income buildings and that it will in all respects satisfy all applicable requirements of federal tax law and any other requirements imposed upon it by Virginia Housing prior to allocation, should one be issued.
6. that the undersigned commits to providing first preference to members of targeted populations having state rental assistance and will not impose any eligibility requirements or lease terms terms for such individuals that are more restrictive than its standard requirements and terms, the terms of the MOU establishing the target population, or the eligibility requirements for the state rental assistance.
7. that, for the purposes of reviewing this application, Virginia Housing is entitled to rely upon representations of the undersigned as to the inclusion of costs in eligible basis and as to all of the figures and calculations relative to the determination of qualified basis for the development as a whole and/or each building therein individually as well as the amounts and types of credit applicable thereof, but that the issuance of a reservation based on such representation in no way warrants their correctness or compliance with IRC requirements.
8. that Virginia Housing may request or require changes in the information submitted herewith, may substitute its own figures which it deems reasonable for any or all figures provided herein by the undersigned and may reserve credits, if any, in an amount significantly different from the amount requested.
9. that reservations of credits are not transferable without prior written approval by Virginia Housing at its sole discretion.

V. STATEMENT OF OWNER

- 10. that the requirements for applying for the credits and the terms of any reservation or allocation thereof are subject to change at any time by federal or state law, federal, state or Virginia Housing regulations, or other binding authority.
- 11. that reservations may be made subject to certain conditions to be satisfied prior to allocation and shall in all cases be contingent upon the receipt of a nonrefundable application fee of \$1000 and a nonrefundable reservation fee equal to 7% of the annual credit amount reserved.
- 12. that a true, exact, and complete copy of this application, including all the supporting documentation enclosed herewith, has been provided to the tax attorney who has provided the required attorney's opinion accompanying this submission.
- 13. that the undersigned has provided a complete list of all residential real estate developments in which the general partner(s) has (have) or had a controlling ownership interest and, in the case of those projects allocated credits under Section 42 of the IRC, complete information on the status of compliance with Section 42 and an explanation of any noncompliance. The undersigned hereby authorizes the Housing Credit Agencies of states in which these projects are located to share compliance information with the Authority.
- 14. that any principal of undersigned has not participated in a planned foreclosure or Qualified Contract request in Virginia after January 1, 2019.
- 15. that undersigned agrees to provide disclosure to all tenants of the availability of Renter Education provided by Virginia Housing.
- 16. that undersigned waives the right to pursue a Qualified Contract on this development.
- 17. that the information in this application may be disseminated to others for purposes of verification or other purposes consistent with the Virginia Freedom of Information Act. However, all information will be maintained, used or disseminated in accordance with the Government Data Collection and Dissemination Practices Act. The undersigned may refuse to supply the information requested, however, such refusal will result in Virginia Housing's inability to process the application. The original or copy of this application may be retained by Virginia Housing, even if tax credits are not allocated to the undersigned.

In Witness Whereof, the undersigned, being authorized, has caused this document to be executed in its name on the date of this application set forth in DEV Info tab hereof.

Legal Name of Owner: Powhatan Apartments James City LLC  
Powhatan Apartments James City MM LLC  
TMG I LLC

By:   
 Its: Adam J. Stockmaster, Manager of AS Squared, its ma  
 (Title)

**V. STATEMENT OF ARCHITECT**

The architect signing this document is certifying that the development plans and specifications incorporate all Virginia Housing Minimum Design and Construction Requirements (MDCR), selected LIHTC enhancements and amenities, applicable building codes and accessibility requirements.

In Witness Whereof, the undersigned, being authorized, has caused this document to be executed in its name on the date of this application set forth in DEV Info tab hereof.

Legal Name of Architect:	Alan R. Miner, AIA
Virginia License#:	0401011591
Architecture Firm or Company:	Miner Feinstein Architects, LLC

By:  \_\_\_\_\_

Its: Principal/Member  
(Title)

Initials by Architect are also required on the following Tabs: Enhancement, Special Housing Needs and Unit Details.

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**V. Previous Participation Certification**

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**Development Name:** Powhatan Apartments

**Name of Applicant (entity):** Powhatan Apartments James City LLC

The undersigned, being duly authorized to sign on behalf of the Applicant, provide this Certification with the understanding that Virginia Housing intends to rely upon the statements made herein for the purpose of awarding and allocating federal low-income housing tax credits.

The following terms shall be defined as follows *for the purpose of this Certification only* :

- “Principal” has the same meaning as defined within the QAP, but as applied to each specific property referenced within this Certification, it excludes individuals and entities whose ownership interest is solely vested in limited partnership interests of the ownership entity.
- “Participant” means all Principals of the Owner who are required to be individually listed within **the organizational chart attached hereto**.

1. All the statements made within this Certification are true, complete and correct to the best of my knowledge and belief and are made in good faith, including the data contained within the organizational charts and any statements attached to this Certification, and I will immediately alert Virginia Housing should I become aware of any information prior to the application deadline which may render my statements herein false or misleading.

2. During any time within the past ten (10) years that any of the Participants were Principals in any multifamily rental property, no mortgagee of any such property declared a default under its mortgage loan or assigned it to the mortgage insurer (governmental or private); no such property was foreclosed upon or dispossessed pursuant to a deed-in-lieu of foreclosure; and no such property received mortgage relief from the mortgagee. For purposes of this statement, "declared a default" refers only to final notices of default issued after the exhaustion of all applicable notice and cure rights.

3. During any time within the last ten (10) years that any of the Participants were a Principal in an owner of multifamily rental property, no such owner was determined to have breached any agreement related to the construction or rehabilitation, use, operation, management or disposition of the property, including removal from a partnership or limited liability company. For the purposes of this statement, "determined to have breached" refers only to determinations made by an independent third-party arbiter or court of law following the expiration of all applicable notice and cure periods and excludes default judgments that have been fully satisfied.

4. No Participant listed in this Certification has been required to turn control of a property over to an investor or been otherwise involuntarily removed as a general partner from the ownership of a multifamily rental property within the past ten (10) years.

5. There are no unresolved material findings of noncompliance resulting from any audits, management reviews, or other governmental investigations performed by (or on behalf of) any state or federal entity, concerning any multifamily rental property in which any of the Participants were Principals at the time of such finding. For the purposes of this statement, a finding is considered resolved if either (a) the state or federal entity issuing the finding has determined that no further action is required to remedy the finding; or (b) the Participant (or entity in which it is a Principal) has entered into a binding agreement with the applicable state or federal entity to address such finding(s) and the Applicant has included with this Certification a copy of such agreement accompanied by a written statement from the state or federal entity verifying that such agreement is not in default and is reasonably expected to be satisfied within (90) days. Any such statement must be addressed to Virginia Housing and dated no more than thirty (30) days prior to submission of the Application.

6. During the past ten (10) years, no Participants were Principals in any multifamily rental property for which payments under any state or federal assistance contract were suspended or terminated. For the purposes of this statement, suspensions and terminations do not include those caused solely by actions or inactions of the state or federal agency, like funding shortages, technical issues, or administrative delays, where the Principals were not at fault.

7. None of the Participants have been convicted of a felony and none are presently the subject of a complaint of indictment charging a felony. A felony is defined as any offense punishable by imprisonment for a term exceeding one year, but does not include any offense classified as a misdemeanor under the laws of a state and punishable by imprisonment of two years or less.

8. No Participant has been suspended, debarred, or otherwise restricted by any federal or state entity from participating in housing programs administered by such entity due to programmatic noncompliance on the part of either the Participant or an entity in which the Participant was a Principal.

9. During the past ten (10) years, (a) no Participant has been the subject of a claim under an employee fidelity bond; and (b) while any Participant was a Principal in an owner of multifamily rental property, no Participant or such related owner defaulted on any obligation secured by a letter of credit or surety or performance bond. For the purposes of this statement, "defaulted" refers only to events where funds were paid by the issuer of a letter of credit or surety or performance bond.

10. No Participant is a Virginia Housing employee or a member of the immediate household of any Virginia Housing employee.

11. No Participant currently holds an ownership interest in a multifamily rental property where construction has stopped for more than 20 consecutive days, unless the stoppage:

- (a) resulted from events beyond the reasonable control of the property owner that also caused similar delays in comparable projects in the surrounding area (e.g. natural disasters, labor strikes, pandemics, or government-imposed work stoppages); or
- (b) solely involves work neither contractually required as a condition of tax credit allocation nor required prior to placing in service all residential buildings within such project.

Additionally, no Participant currently holds an ownership interest in a multifamily rental property assisted by a federal or state governmental entity and that has been substantially complete for more than 90 days without the required closing documents (such as the final cost certification) being filed, unless the delay is solely attributable to the governmental entity and not to the property owner or its agents.

12. No court of competent jurisdiction or other federal or state governmental entity has found any Participant to be in violation of any applicable civil rights, fair housing, or equal employment opportunity laws or regulations.

13. During the past ten (10) years, no Participant was a Principal in any multifamily rental property found by a court of competent jurisdiction or other federal or state governmental entity to have failed to comply with Section 42 of the Internal Revenue Code of 1986, as amended (this statement does not refer to 8823s deemed corrected by the issuing agency).

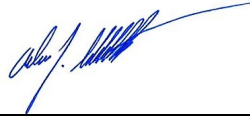
14. No Participants are currently named as a defendant in a civil lawsuit relating to their ownership or other participation in a multi-family housing development where the amount of damages sought by the plaintiffs against the Participants relates to such ownership or participation and is for an amount greater than One Million Dollars (\$1,000,000).

15. No Participant has pursued a Qualified Contract or planned foreclosure in Virginia after January 1, 2019.

Statements above (if any) to which I cannot certify have been deleted by striking through the words. In the case of any such deletion and failure to certify, I have attached the following, which if not provided will automatically disqualify this Application from consideration:

- A. Supporting documentation sufficient to both outline the relevant facts and circumstances that necessitated each deletion and to explain why such deletion(s) should not result in disqualification; and
- B. A draft of Virginia Housing's form Right of First Refusal, which the Applicant commits to properly execute and record as a condition of any reservation or allocation of low-income housing tax credits made with regard to the Development named above.

Any material misrepresentations or omissions made on this form are grounds for rejection of this Application, forfeiture of any credits awarded with connection with this Application, and prohibition against the submission of future applications.



\_\_\_\_\_  
Signature

Adam J. Stockmaster

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
3/4/2026

\_\_\_\_\_  
Date (no more than 30 days prior to submission of the Application)

**W. LIHTC SELF SCORE SHEET**

**Self Scoring Process**

This Self Scoring Process is intended to provide you with an estimate of your application's score based on the information included within the reservation application. Other items, denoted below in the yellow shaded cells, are typically evaluated by Virginia Housing's staff during the application review and feasibility process. For purposes of self scoring, we have made certain assumptions about your application. Edit the appropriate responses (Y or N) in the yellow shaded cells, if applicable. Items 5f and 5g require a numeric value to be entered.

Please remember that this score is only an estimate. Virginia Housing reserves the right to change application data and/or score sheet responses where appropriate, which may change the final score.

**MANDATORY ITEMS:**

- a. Signed, completed application with attached tabs in PDF format
- b. Active Excel copy of application
- c. Partnership agreement
- d. SCC Certification
- e. Previous participation form
- f. Site control document
- g. RESNET Certification
- h. Attorney's opinion
- i. Nonprofit questionnaire (if applicable)
- j. Appraisal
- k. Zoning document
- l. Plans and Specifications

Included		Score
Y	Y or N	0
Y	Y or N	0
Y	Y or N	0
Y	Y or N	0
Y	Y or N	0
Y	Y or N	0
Y	Y or N	0
Y	Y or N	0
Y	Y, N, N/A	0
Y	Y or N	0
Y	Y or N	0
Y	Y or N	0
<b>Total:</b>		<b>0.00</b>

**1. READINESS:**

- a. Virginia Housing notification letter to CEO (via Locality Notification Information App)
- b. Local CEO Opposition Letter
- c. Plan of development
- d. Location in a revitalization area based on Qualified Census Tract
- or e. Location in a revitalization area with resolution or by locality
- or f. Location in a Opportunity Zone
  - g. Location in a Medium to High level Economic Development Jurisdiction
  - h. Location on land owned by Tribal Nation

Y	0 or -50	0.00
N	0 or -25	0.00
Y	0 to 10	10.00
N	0 or 10	0.00
Y	0 or 15	15.00
N	0 or 15	0.00
Y	0 or 5	5.00
N	0 or 15	0.00
<b>Total:</b>		<b>30.00</b>

**2. HOUSING NEEDS CHARACTERISTICS:**

- a. Sec 8 or PHA waiting list preference
- b. Existing RD, HUD Section 8 or 236 program
- c. Subsidized funding commitments
- d. Tax abatement on increase of property's value
- e. New project based rental subsidy) in Northern Virginia or New Construction pool
- f. Census tract with <12% poverty rate
- g. Development provided priority letter from Rural Development
- h. Dev. located in area with increasing rent burdened population

Y	0 or up to 5	5.00
Y	0 or 20	20.00
0.00%	Up to 60	0.00
N	0 or 5	0.00
N	up to 40	0.00
0%	0, 20, 25 or 30	0.00
Y	0 or 15	15.00
Y	Up to 20	0.00
<b>Total:</b>		<b>40.00</b>

3. DEVELOPMENT CHARACTERISTICS:

a. Enhancements (See calculations below)			81.00
b. <removed for 2026>			0.00
c. HUD 504 accessibility for 10% of units	Y	0 or 20	20.00
d. Proximity to public transportation	Y10	0, 10 or 20	10.00
e. Development will be Green Certified	Y	0 or 10	10.00
f. Units constructed to meet Virginia Housing's Universal Design standards	10%	Up to 15	1.56
g. Developments with less than 100 low income units	Y	up to 20	20.00
h. Historic Structure eligible for Historic Rehab Credits	N	0 or 5	0.00
i. Meets Target Population Development Characteristics	N	0 or 10	0.00
Total:			<u>142.56</u>

4. TENANT POPULATION CHARACTERISTICS:

Locality AMI	State AMI
\$106,500	\$78,100

a. Less than or equal to 20% of units having 1 or less bedrooms	N	0 or 15	0.00
b. <plus> Percent of Low Income units with 3 or more bedrooms	0.00%	Up to 15	0.00
c. Units with rent and income at or below 30% of AMI and are not subsidized (up to 10% of LI units)	0.00%	Up to 10	0.00
d. Units with rents at or below 40% of AMI (up to 10% of LI units)	16.67%	Up to 10	10.00
e. Units in Higher Income Jurisdictions with rent and income at or below 50% of AMI	50.00%	Up to 50	50.00
f. Units in Higher Income Jurisdictions with rents <= 50% rented to tenants with <= 60% of AMI	50.00%	Up to 25	0.00
or g. Units in LI Jurisdictions with rents <= 50% rented to tenants with <= 60% of AMI	50.00%	Up to 50	0.00
Total:			<u>60.00</u>

5. SPONSOR CHARACTERISTICS:

a. <QAP change - removed for 2026 cycle>	N		0.00
b. Veteran Small Business Principal owner 25% or greater	N	0 or 30	0.00
c. Developer experience - uncorrected life threatening hazard	N	0 or -50	0.00
d. Developer experience - noncompliance	N	0 or -15	0.00
e. Developer experience - did not build as represented (per occurrence)	0	0 or -2x	0.00
f. Developer experience - failure to provide minimum building requirements (per occurrence)	0	0 or -50 per item	0.00
g. Developer experience - termination of credits by Virginia Housing	N	0 or -10	0.00
h. Developer experience - exceeds cost limits at certification	N	0 or -50	0.00
i. Developer experience - more than 2 requests for Final Inspection	0	0 or -5 per item	0.00
j. Management company rated unsatisfactory	N	0 or -25	0.00
Total:			<u>0.00</u>

6. EFFICIENT USE OF RESOURCES:

a. Credit per unit		Up to 100	51.05
Total:			<u>51.05</u>

7. BONUS POINTS:

a. Extended Use Restriction beyond 15 year compliance period	35 Years	40 or 70	70.00
or b. Nonprofit or LHA purchase option/ ROFR	N	0 or 60	0.00
or c. Nonprofit or LHA Home Ownership option	N	0 or 5	0.00
d. Combined 9% and 4% Tax Exempt Bond Site Plan	N	10 or 15	0.00
e. RAD or PHA Conversion participation and competing in Local Housing Authority pool	N	0 or 10	0.00
f. Team member with Veteran Owned Small Business Certification	N	up to 10	0.00
g. Commitment to electronic payment of fees	Y	0 or 5	5.00
h. Zero Ready or Passive House certification from prior allocation	N	0, 10 or 20	0.00
Total:			<u>75.00</u>

300 Point Threshold - all 9% Tax Credits  
 200 Point Threshold - Tax Exempt Bonds

**TOTAL SCORE: 398.61**

**Enhancements:**

All units have:	Max Pts	Score
a. Community Room	5	5.00
b. Exterior walls constructed with brick and other low maintenance materials	40	40.00
c. LED Kitchen Light Fixtures	2	2.00
d. Cooking surfaces equipped with fire suppression features	2	2.00
e. Bath Fan - Delayed timer or continuous exhaust	3	3.00
f. Baths equipped with humidistat	3	0.00
g. Watersense labeled faucets, toilets and showerheads (without Green Certification)	3	0.00
h. Rehab only: new infrastructure for high speed internet/broadband	5	5.00
i. Each unit provided free individual high speed internet access	15	15.00
j. USB in kitchen, living room and all bedrooms	1	1.00
k. Rehab only: dedicated space to accept permanent dehumidification system	2	0.00
l. Provides Permanently installed dehumidification system	5	5.00
m. All interior doors within units are solid core	3	3.00
n. Installation of Renewable Energy Electric system	10	0.00
o. New Construction: Balcony or patio	4	0.00
		81.00
 All elderly units have:		
p. Front-control ranges	1	0.00
q. Independent/suppl. heat source	1	0.00
r. Two eye viewers	1	0.00
s. Shelf or Ledge at entrance within interior hallway	2	0.00
		0.00

**Total amenities:      81.00**

X. Development Summary

Summary Information 2026 Low-Income Housing Tax Credit Application For Reservation

**Deal Name:** Powhatan Apartments

**Cycle Type:** 9% Tax Credits **Requested Credit Amount:** \$950,000  
**Allocation Type:** Acquisition/Rehab **Jurisdiction:** Williamsburg City  
**Total Units:** 48 **Population Target:** General  
**Total LI Units:** 48  
**Project Gross Sq Ft:** 39,627.00 **Owner Contact:** Adam Stockmaster  
**Green Certified?** TRUE

**Total Score**  
398.61

Source of Funds	Amount	Per Unit	Per Sq Ft	Annual Debt Service
Permanent Financing	\$7,727,115	\$160,982	\$195	\$379,201
Grants	\$0	\$0		
Subsidized Funding	\$0	\$0		

Uses of Funds - Actual Costs				
Type of Uses	Amount	Per Unit	Sq Ft	% of TDC
Improvements	\$7,303,815	\$152,163	\$184	45.05%
General Req/Overhead/Profit	\$658,152	\$13,712	\$17	4.06%
Other Contract Costs	\$168,378	\$3,508	\$4	1.04%
Owner Costs	\$2,402,231	\$50,046	\$61	14.82%
Acquisition	\$4,080,000	\$85,000	\$103	25.17%
Developer Fee	\$1,599,006	\$33,313	\$40	9.86%
<b>Total Uses</b>	<b>\$16,211,582</b>	<b>\$337,741</b>		

Total Development Costs	
Total Improvements	\$10,532,576
Land Acquisition	\$4,080,000
Developer Fee	\$1,599,006
<b>Total Development Costs</b>	<b>\$16,211,582</b>

**Proposed Cost Limit/Sq Ft:** \$306  
**Applicable Cost Limit/Sq Ft:** \$417  
**Proposed Cost Limit/Unit:** \$252,741  
**Applicable Cost Limit/Unit:** \$504,522

Income	
Gross Potential Income - LI Units	\$891,276
Gross Potential Income - Mkt Units	\$0
Subtotal	\$891,276
Less Vacancy % 7.00%	\$62,389
<b>Effective Gross Income</b>	<b>\$828,887</b>

**Rental Assistance?** TRUE

Unit Breakdown	
# of Eff	0
# of 1BR	0
# of 2BR	48
# of 3BR	0
# of 4+ BR	0
<b>Total Units</b>	<b>48</b>

Expenses		
Category	Total	Per Unit
Administrative	\$146,556	\$3,053
Utilities	\$52,875	\$1,102
Operating & Maintenance	\$88,367	\$1,841
Taxes & Insurance	\$79,017	\$1,646
<b>Total Operating Expenses</b>	<b>\$366,815</b>	<b>\$7,642</b>
Replacement Reserves	\$25,200	\$525
<b>Total Expenses</b>	<b>\$392,015</b>	<b>\$8,167</b>

	Income Levels	Rent Levels
	# of Units	# of Units
<=30% AMI	0	0
40% AMI	8	8
50% AMI	16	16
60% AMI	24	24
>60% AMI	0	0
Market	0	0

Cash Flow	
EGI	\$828,887
Total Expenses	\$392,015
<b>Net Income</b>	<b>\$436,872</b>
Debt Service	\$379,201
<b>Debt Coverage Ratio (YR1):</b>	<b>1.15</b>

**Income Averaging?** FALSE

**Extended Use Restriction?** 50

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**Y. Efficient Use of Resources**

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If the Combined Max Allowable Credits is \$500,000 and the annual credit requested is \$200,000, you are providing a 60% savings for the program. This deal would receive all 100 credit points.

For another example, the annual credit requested is \$300,000 or a 40% savings for the program. Using a sliding scale, the credit points would be calculated by the difference between your savings and the desired 60% savings. Your savings divided by the goal of 60% times the max points of 100. In this example,  $(40\%/60\%) \times 100$  or 66.67 points.

Tax Exempt Deals are granted a starting point value greater than zero to allow for the nature of these deals.

Combined Max	\$1,369,526
Credit Requested	\$950,000
% of Savings	30.63%
Sliding Scale Points	51.05

# Tab A:

Partnership or Operating Agreement, including  
Org Chart with percentages of ownership interest

**Powhatan Apartments**  
226 Burton Woods Drive, Williamsburg, VA 23188  
(Mortgaged Property)

**Powhatan Apartments James City, LLC**  
a VA limited liability company  
**Borrower**

**Powhatan Apartments James City MM, LLC**  
a VA limited liability company  
0.01% General Partner/Managing Member  
<1.0% Indirect and Aggregate Ownership in Borrower  
**Borrower Principal and DET**

**Private Corporate Investment Limited Partner**  
A XX limited liability company  
99.99% Investor Member  
**Key Borrower/Borrower Principal**

**TMG I, LLC**  
a VA limited liability company  
100% Managing member  
0.01% Indirect and Aggregate Ownership in Borrower  
**Borrower Principal and DET**

**AS Squared, LLC**  
a VA limited liability company  
80% Manager/Member  
0.008% Indirect and Aggregate Ownership in Borrower  
**Borrower Principal and DET**

**ACB Communities, LLC**  
a VA limited liability company  
10% Member  
0.001% Indirect and Aggregate Ownership in Borrower  
**DET**

**DN Residential, LLC**  
a VA limited liability company  
10% Member  
0.001% Indirect and Aggregate Ownership in Borrower  
**DET**

**Adam J. Stockmaster**  
a U.S. Individual  
60% Managing Member  
Key Borrower Principal  
**Ari D. Severe**  
a U.S. Individual  
40% Member

**Amy C. Brown**  
a U.S. individual  
100% Member

**Donald B. Nuzzio Jr.**  
a U.S. Individual  
100% Member

# **Tab B:**

Virginia State Corporation Commission Certification  
(MANDATORY)

# Commonwealth of Virginia



## State Corporation Commission

### CERTIFICATE OF FACT

I Certify the Following from the Records of the Commission:

That Powhatan Apartments James City LLC is duly organized as a Limited Liability Company under the law of the Commonwealth of Virginia;

That the Limited Liability Company was formed on February 19, 2025; and

That the Limited Liability Company is in existence in the Commonwealth of Virginia as of the date set forth below.

Nothing more is hereby certified.



Signed and Sealed at Richmond on this Date:

March 10, 2026

A handwritten signature in cursive script, appearing to read "Bernard J. Logan".

Bernard J. Logan, Clerk of the Commission

# **Tab C:**

Syndicator's or Investor's Letter of Intent  
(MANDATORY)



Vibrant Communities Drive Change

TM Associates  
Powhatan Apartments  
James City LLC  
c/o Donald Nuzzio  
1375 Piccard Dr., Suite 375  
Rockville, MD 20850

RE:  
Powhatan Apartments  
Powhatan Apartments James City LLC  
Investor Letter of Intent

Dear Mr. Nuzzio,

VCDC anticipates an appetite for the Low-Income Housing Tax Credits to be generated by the development of Powhatan Apartments. Subject to the usual and customary due diligence and investor committee approval, VCDC is prepared to purchase the Investor Member interests in Powhatan Apartments James City LLC on behalf of an equity fund created for the purpose of promoting the development of affordable housing.

Based on our analysis of the information provided to date, the Investor Member is interested in making a total equity investment of \$7,789,221 to Powhatan Apartments James City LLC. This investment is based on the Investor Member's 99.99% share of the projected annual Low Income Housing Tax Credit of \$950,000 at \$.82 per credit dollar, and other tax benefits.

Please feel free to contact me if you have any questions. We look forward to working with you again.

Sincerely,

Steve Bleile  
Vice President of Community Investments

115 S 15<sup>th</sup> Street  
Suite 501  
Richmond VA 23219  
804.343.1200  
vibrantcommunities.us



# **Tab D:**

Any Supporting Documentation related to List of LIHTC Developments (Schedule A)

**N/A**

# **Tab E:**

Site Control Documentation & Most Recent Real  
Estate Tax Assessment (MANDATORY)

**AMENDED AND RESTATED  
AGREEMENT OF PURCHASE AND SALE**

THIS AMENDED AND RESTATED AGREEMENT OF PURCHASE AND SALE is made this 25<sup>TH</sup> day of February 2026, by and between **POWHATAN LIMITED PARTNERSHIP**, a Virginia limited partnership (hereinafter referred to as the "Seller") and **POWHATAN APARTMENTS JAMES CITY LLC**, a Virginia limited liability company (hereinafter referred to as the "Buyer").

WITNESSETH:

1. That for and in consideration of the Deposit of One Dollar (\$1.00) paid by Buyer to Seller, the receipt and sufficiency of which is hereby acknowledged, the Seller hereby agrees to sell to the Buyer, its successors and assigns, and the Buyer agrees to purchase from the Seller the real property located at **226 Burton Woods Drive, Williamsburg, VA 23188**, which is currently known as **Powhatan Apartments**, consisting of 48 residential units, together with all easements, rights, and appurtenances attached thereto and all improvements thereon (all of which is hereinafter referred to as the "Real Estate"), for a purchase price of **Four Million Eighty Thousand and No/100 Dollars (\$4,080,000.00)**, which purchase price shall include Buyer's assumption of a first mortgage lien ("Loan Assumption") in favor of Farmers Home Administration (the "Purchase Price").

2. The Seller hereby represents and warrants to the Buyer that its title to the Real Estate is good, merchantable and marketable fee simple title, free and clear of all liens and encumbrances, except the lien of a first mortgage to Farmers Home Administration and any easements of record which do not adversely effect the use of the property for residential purposes.

3. Buyer will assume and agrees to pay all assessments becoming a lien after the date of the closing hereunder. The Seller shall not receive a credit for the real estate taxes assessed during the taxable year in which the Closing occurs.

4. In the event of any condemnation of the Real Estate or any part thereof prior to closing, Buyer may elect either to terminate this Agreement, or to purchase the remainder of the Real Estate with a pro rata reduction in the purchase price.

5. The closing of the purchase and sale of the Real Estate shall occur at the office of the closing attorney or Title Company designated by the Buyer on or before **December 31, 2027**.

6. At closing, the Buyer shall pay the Purchase Price to the Seller (less the amount of the Loan Assumption).

7. At the closing, Seller shall execute, acknowledge and deliver to Buyer, or its nominee, successor, or assignee, a general warranty deed in form satisfactory and acceptable to Buyer's counsel, with full English Covenants of title, conveying the Real Estate to the Buyer, its nominee, successor or assignee, free and clear of all liens, encumbrances, title defects and exceptions and rights of others except the lien of a first

mortgage to the Farmers Home Administration and any easements of record which do not adversely effect the use of the property for residential purposes. The cost of any documentary, transfer and exercise taxes imposed upon the conveyance, other than the Grantor's Tax, shall be paid by the Buyer. The Seller shall pay the Grantor's Tax. Possession of the Real Estate shall be delivered to Buyer at closing in the same condition as it now is in, ordinary wear and tear only expected. In addition, the Seller shall deliver to the Buyer all cash in all accounts of the Seller, including the operating account, escrow accounts, reserve accounts and tenant security accounts. The Seller shall also deliver to the Buyer all records and files of the Seller relating to or in any way pertaining to the Real Estate and the apartment project situated thereon which are in the possession of or under the control of the Seller or the managing agent employed by the Seller.

8. This Agreement shall be binding upon and inure to the benefit of Buyer and Seller and their respective successors and assigns.

9. If the Seller fails to perform its obligations hereunder, Buyer shall be entitled to its remedies at law and to enforce this Agreement by an action for specific performance. If the Buyer fails to perform its obligations hereunder, the Seller shall retain the Deposit as its sole and exclusive remedy.

10. No delay, forbearance or neglect by the Buyer in the enforcement of any of the conditions of this Agreement or any of Buyer's rights or remedies hereunder shall constitute or be construed as a waiver thereof. No waiver of any of the conditions of this agreement by Buyer shall be effective unless expressly and affirmatively made and given by Buyer in writing.

11. Time is of the essence for the performance of each and every covenant contained herein.

12. This instrument contains and constitutes the entire agreement of the parties regarding the subject matter hereof, and there are no other agreements, written or oral between the parties affecting the subject matter hereof. No amendment of this agreement shall be effective unless it is in writing and signed by the parties hereto.

13. This instrument contains and constitutes the entire agreement of the parties regarding the subject matter hereof, and there are no other agreements, written or oral between the parties affecting the subject matter hereof. No amendment of this agreement shall be effective unless it is in writing and signed by the parties hereto. This Agreement amends and restates, in its entirety, that Agreement of Purchase and Sale dated as of March 7, 2025.

14. This agreement shall be interpreted and enforced according to the laws of the Commonwealth of Virginia.


[REMAINDER OF PAGE INTENTIONALLY LEFT BLANK]

IN WITNESS WHEREOF, the parties have signed, sealed and delivered this Amended and Restated Agreement of Purchase and Sale on the date first above written.


SELLER:

**POWHATAN LIMITED PARTNERSHIP**

By: MARG Rural LLC,  
a West Virginia limited liability company,  
its General Partner

By:   
\_\_\_\_\_  
Robert B. Margolis, Manager

By: Margolis Family Investments, LLC,  
a Maryland limited liability company,  
its Limited Partner

By:   
\_\_\_\_\_  
Robert B. Margolis, Manager


PURCHASER:

**POWHATAN APARTMENTS JAMES CITY LLC,**  
a Virginia limited liability company

By: Powhatan Apartments James City MM LLC,  
a Virginia limited liability company,  
its Manager

By: TMG I LLC,  
a Virginia limited liability company,  
its Manager

By: AS Squared, LLC  
a Virginia limited liability company,  
its Manager

By:   
\_\_\_\_\_  
Adam J. Stockmaster, Manager



VIRGINIA HOUSING  
 601 SOUTH BELVIDERE STREET  
 RICHMOND VA 23220

<b>Powhatan LP</b>	<b>Orig. Loan: 625,000.00</b>	<b>Cur. Balance: 73,319.22</b>	<b>Cur DFLT Int Balance: 0.00</b>
<b>1375 Piccard Drive Suite 375</b>	<b>Beginning: 09/10/2002</b>	<b>Dial Balance: 0.00</b>	<b>DFLT Interest Rate: 0.000000000%</b>
<b>Rockville, MD 20850</b>	<b>Term: 25 Years 0 Months</b>	<b>Interest: 5.000000000%</b>	<b>DFLT Interest @ Mature: 0.000000000%</b>
	<b>Ending: 10/01/2027</b>	<b>Dial Rate: 0.000000000%</b>	<b>Next Payment Due Date: 02/01/2026</b>
		<b>Type: F</b>	<b>Frequency: M001</b>

Date	Transaction Description	Paid For	Amount	CK#	Principal	Interest	PMI /FHA	Taxes	Insurance	Reserves	Misc	Misc Exp	Suspense	Late Charge	Buydown	Principal Balance	Effective Date
<b>Beginning Balances</b>					<b>115,602.23</b>		<b>0.00</b>	<b>1,610.58</b>	<b>-1,665.50</b>	<b>18,466.91</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>			
01/14/2025	PMT REC'D	01/01/2025	6,996.22	0	-3,172.01	481.68	0.00	1,804.78	737.75	800.00	0.00	0.00	0.00	0.00	0.00	112,430.22	01/14/2025
01/16/2025	INT RES CR		76.96	0	0.00	0.00	0.00	0.00	0.00	76.96	0.00	0.00	0.00	0.00	0.00	112,430.22	
02/13/2025	** REBATE		5,206.02	9999999	0.00	0.00	0.00	0.00	0.00	-5,206.02	0.00	0.00	0.00	0.00	0.00	112,430.22	02/13/2025
02/14/2025	PMT REC'D	02/01/2025	7,054.51	0	-3,185.23	468.46	0.00	1,863.07	737.75	800.00	0.00	0.00	0.00	0.00	0.00	109,244.99	02/14/2025
02/19/2025	INT RES CR		79.69	0	0.00	0.00	0.00	0.00	0.00	79.69	0.00	0.00	0.00	0.00	0.00	109,244.99	
03/12/2025	INT RES CR		60.89	0	0.00	0.00	0.00	0.00	0.00	60.89	0.00	0.00	0.00	0.00	0.00	109,244.99	
03/14/2025	PMT REC'D	03/01/2025	7,054.51	0	-3,198.50	455.19	0.00	1,863.07	737.75	800.00	0.00	0.00	0.00	0.00	0.00	106,046.49	03/14/2025
03/20/2025	ANN PRP/LB		16,626.00	56370	0.00	0.00	0.00	0.00	-16,626.00	0.00	0.00	0.00	0.00	0.00	0.00	106,046.49	03/20/2025
03/20/2025	ANN EX LB		2,552.00	56370	0.00	0.00	0.00	0.00	-2,552.00	0.00	0.00	0.00	0.00	0.00	0.00	106,046.49	03/20/2025
04/14/2025	INT RES CR		62.69	0	0.00	0.00	0.00	0.00	0.00	62.69	0.00	0.00	0.00	0.00	0.00	106,046.49	
04/14/2025	PMT REC'D	04/01/2025	9,928.24	0	-3,211.83	441.86	0.00	1,863.07	3,611.48	800.00	0.00	0.00	0.00	0.00	0.00	102,834.66	04/14/2025
05/14/2025	TAX DISB	06/05/2025	11,022.96	56514	0.00	0.00	0.00	-11,022.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	102,834.66	
05/14/2025	PMT REC'D	05/01/2025	9,928.24	0	-3,225.21	428.48	0.00	1,863.07	3,611.48	800.00	0.00	0.00	0.00	0.00	0.00	99,609.45	05/14/2025
05/15/2025	INT RES CR		61.89	0	0.00	0.00	0.00	0.00	0.00	61.89	0.00	0.00	0.00	0.00	0.00	99,609.45	
06/16/2025	PMT REC'D	06/01/2025	9,928.24	0	-3,238.65	415.04	0.00	1,863.07	3,611.48	800.00	0.00	0.00	0.00	0.00	0.00	96,370.80	06/16/2025



VIRGINIA HOUSING  
 601 SOUTH BELVIDERE STREET  
 RICHMOND VA 23220

<b>Powhatan LP</b>	<b>Orig. Loan: 625,000.00</b>	<b>Cur. Balance: 73,319.22</b>	<b>Cur DFLT Int Balance: 0.00</b>
<b>1375 Piccard Drive Suite 375</b>	<b>Beginning: 09/10/2002</b>	<b>Dial Balance: 0.00</b>	<b>DFLT Interest Rate: 0.000000000%</b>
<b>Rockville, MD 20850</b>	<b>Term: 25 Years 0 Months</b>	<b>Interest: 5.000000000%</b>	<b>DFLT Interest @ Mature: 0.000000000%</b>
	<b>Ending: 10/01/2027</b>	<b>Dial Rate: 0.000000000%</b>	<b>Next Payment Due Date: 02/01/2026</b>
		<b>Type: F</b>	<b>Frequency: M001</b>

Date	Transaction Description	Paid For	Amount	CK#	Principal	Interest	PMI /FHA	Taxes	Insurance	Reserves	Misc	Misc Exp	Suspense	Late Charge	Buydown	Principal Balance	Effective Date
<b>Beginning Balances</b>					<b>115,602.23</b>		<b>0.00</b>	<b>1,610.58</b>	<b>-1,665.50</b>	<b>18,466.91</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>			
06/17/2025	INT RES CR		69.56	0	0.00	0.00	0.00	0.00	0.00	69.56	0.00	0.00	0.00	0.00	0.00	96,370.80	
07/14/2025	PMT REC'D	07/01/2025	9,928.24	0	-3,252.15	401.54	0.00	1,863.07	3,611.48	800.00	0.00	0.00	0.00	0.00	0.00	93,118.65	07/14/2025
07/15/2025	INT RES CR		67.83	0	0.00	0.00	0.00	0.00	0.00	67.83	0.00	0.00	0.00	0.00	0.00	93,118.65	
08/13/2025	INT RES CR		73.39	0	0.00	0.00	0.00	0.00	0.00	73.39	0.00	0.00	0.00	0.00	0.00	93,118.65	
08/14/2025	PMT REC'D	08/01/2025	9,928.24	0	-3,265.70	387.99	0.00	1,863.07	3,611.48	800.00	0.00	0.00	0.00	0.00	0.00	89,852.95	08/14/2025
09/15/2025	INT RES CR		72.92	0	0.00	0.00	0.00	0.00	0.00	72.92	0.00	0.00	0.00	0.00	0.00	89,852.95	
09/15/2025	PMT REC'D	09/01/2025	9,928.24	0	-3,279.30	374.39	0.00	1,863.07	3,611.48	800.00	0.00	0.00	0.00	0.00	0.00	86,573.65	09/15/2025
10/14/2025	PMT REC'D	10/01/2025	9,928.24	0	-3,292.97	360.72	0.00	1,863.07	3,611.48	800.00	0.00	0.00	0.00	0.00	0.00	83,280.68	10/14/2025
10/15/2025	INT RES CR		72.83	0	0.00	0.00	0.00	0.00	0.00	72.83	0.00	0.00	0.00	0.00	0.00	83,280.68	
11/05/2025	TAX DISB	12/05/2025	11,729.56	57008	0.00	0.00	0.00	-11,729.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	83,280.68	
11/14/2025	PMT REC'D	11/01/2025	9,928.24	0	-3,306.69	347.00	0.00	1,863.07	3,611.48	800.00	0.00	0.00	0.00	0.00	0.00	79,973.99	11/14/2025
11/17/2025	INT RES CR		78.47	0	0.00	0.00	0.00	0.00	0.00	78.47	0.00	0.00	0.00	0.00	0.00	79,973.99	
12/15/2025	INT RES CR		77.06	0	0.00	0.00	0.00	0.00	0.00	77.06	0.00	0.00	0.00	0.00	0.00	79,973.99	
12/15/2025	PMT REC'D	12/01/2025	9,928.24	0	-3,320.47	333.22	0.00	1,863.07	3,611.48	800.00	0.00	0.00	0.00	0.00	0.00	76,653.52	12/15/2025
<b>Ending Balances</b>					<b>76,653.52</b>		<b>0.00</b>	<b>1,156.61</b>	<b>13,873.07</b>	<b>23,715.07</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>			



VIRGINIA HOUSING  
 601 SOUTH BELVIDERE STREET  
 RICHMOND VA 23220

Powhatan LP	Orig. Loan: 625,000.00	Cur. Balance: 73,319.22	Cur DFLT Int Balance: 0.00
1375 Piccard Drive Suite 375	Beginning: 09/10/2002	Dial Balance: 0.00	DFLT Interest Rate: 0.000000000%
Rockville, MD 20850	Term: 25 Years 0 Months	Interest: 5.000000000%	DFLT Interest @ Mature: 0.000000000%
	Ending: 10/01/2027	Dial Rate: 0.000000000%	Next Payment Due Date: 02/01/2026
		Type: F	Frequency: M001

Date	Transaction Description	Paid For	Amount	CK#	Principal	Interest	PMI /FHA	Taxes	Insurance	Reserves	Misc	Misc Exp	Suspense	Late Charge	Buydown	Principal Balance	Effective Date
			Beginning Balances		115,602.23		0.00	1,610.58	-1,665.50	18,466.91	0.00	0.00	0.00	0.00			
			Total Paid		38,948.71	4,895.57	0.00	22,752.52	19,178.00	0.00	0.00	0.00	0.00	0.00	0.00		



# Property Information: LRSN #9882

## Property Details

<b>Owner:</b> POWHATAN LIMITED PARTNERSHIP%VA
<b>Owner 2:</b> HOUSING(VDHA) MULTI-FAMILY/FINANCE
<b>Parcel Address:</b> 126 BURTON WOODS DR, Williamsburg, VA 23188
<b>LRSN:</b> 9882
<b>Parcel ID (PIN):</b> 3130100012A
<b>Mail Address:</b> PO BOX 5127
<b>Mail City State ZIP:</b> RICHMOND, VA 232206500
<b>Parcel Class Description:</b> Multi-Family
<b>Legal Acreage:</b> 3.579
<b>Property Description:</b> POWHATAN APARTMENTS; PHASE II BURTON WDS; OFFICE ADDRESS FOR LOCAL MAI...
<b>Subdivision:</b> Powhatan Apts

## Parcel Overview

<b>Elementary School:</b> D.J. Montague
<b>Middle School:</b> Hornsby
<b>High School:</b> Lafayette
<b>Recycle Day:</b> Tuesday
<b>Recycle Week:</b> Blue
<b>Land Use Designation:</b> Moderate Density Residential
<b>Zoning:</b> R5 Multi-Family Residential
<b>Air Approach:</b> No
<b>VA Senate District:</b> 26
<b>VA House District:</b> 71
<b>Congressional District:</b> 1
<b>Election District:</b> Powhatan
<b>Voting Precinct:</b> Powhatan A
<b>Polling Place:</b> Hornsby Middle School
<b>Primary Service Area:</b> Yes
<b>Census:</b> 80207



# Property Information: LRSN #9882

## Assessment History

Valuation as of:	January 1, 2024	January 1, 2025	January 1, 2026
Effective for Billing:	July 1, 2024	July 1, 2025	July 1, 2026
Land Value	\$575,000	\$575,000	\$575,000
Improvement Value	\$2,251,400	\$2,251,400	\$2,251,400
Total Value	\$2,826,400	\$2,826,400	\$2,826,400

## Improvements

Year Built: 1981
Stories: 1

## Approximate Square Footage

Finished (above grade): 37200
Basement: NA
Attached Garage(s): NA
Detached Garage(s): NA
Enclosed Porch(es): NA
Open Porch(es): NA
Deck(s): NA
Other(s): NA

## Construction

Foundation: NA
Exterior: NA
Central A/C: N

## Rooms

Total: 48
Bedrooms: NA
Full Baths: NA
Half Baths: NA



# Property Information: LRSN #9882

## Ownership History (Ownership Updated: 3/9/2026)

Previous Owner	Sale Date	Sale Price	Doc /Deed Ref
SECOND BURTON WOODS	11/9/2000	\$1,006,582	000021500

## Plat History

Name	Plat	Date	Deed	Comments
Powhatan Limited partnership	<a href="#">85-0059</a>	4/2/2002	020008253	N/A
Burton Woods Ph 2	<a href="#">79-0030</a>	11/9/2000	000021500	N/A
Heritage Builders INC	<a href="#">32-0081</a>	7/25/1975	32-81	N/A



# Property Information: LRSN #9882

## Property Tax Information

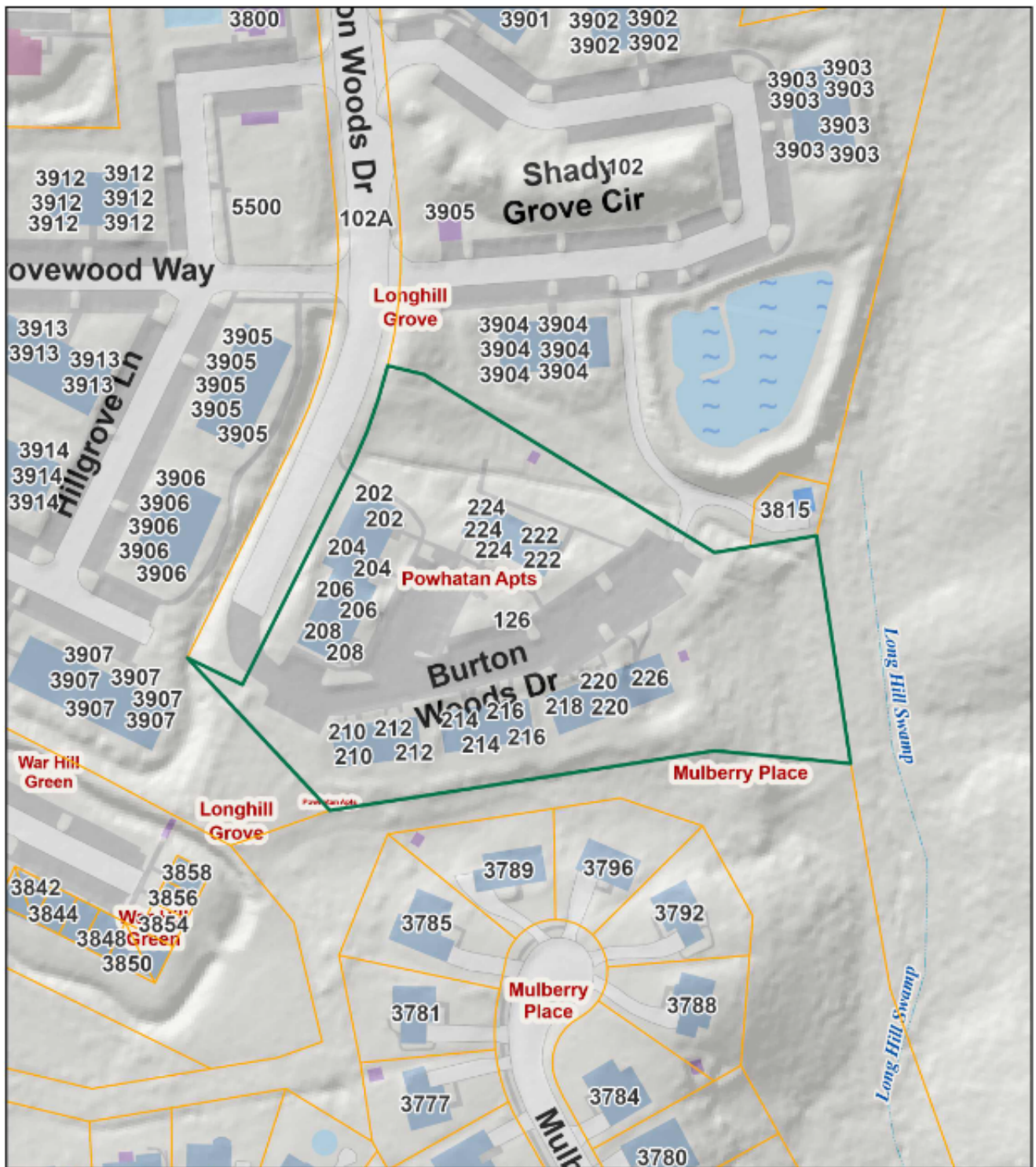
Total Balance Due	Calculated As Of
\$11,729.56	3/11/2026

Year	Installment	Due Date	Tax Amount	Tax Billed	Penalty Accrued	Interest Accrued	Tax Paid	Date Paid	Balance Due
2025	2	6/5/2026	\$11,729.56	\$11,729.56	-	-	-		\$11,729.56
2025	1	12/5/2025	\$11,729.56	\$11,729.56	-	-	\$11,729.56	11/7/2025	-
2024	2	6/5/2025	\$11,022.96	\$11,022.96	-	-	\$11,022.96	5/19/2025	-
2024	1	12/5/2024	\$11,022.96	\$11,022.96	-	-	\$11,022.96	11/22/2024	-
2023	2	6/5/2024	\$10,828.60	\$10,828.60	-	-	\$10,828.60	5/6/2024	-
2023	1	12/5/2023	\$10,828.60	\$10,828.60	-	-	\$10,828.60	11/28/2023	-
2022	2	6/5/2023	\$10,828.60	\$10,828.60	-	-	\$10,828.60	5/17/2023	-
2022	1	12/5/2022	\$10,828.60	\$10,828.60	-	-	\$10,828.60	11/22/2022	-
2021	2	6/6/2022	\$10,167.78	\$10,167.78	-	-	\$10,167.78	5/19/2022	-
2021	1	12/6/2021	\$10,167.78	\$10,167.78	-	-	\$10,167.78	11/17/2021	-
2020	2	6/7/2021	\$10,167.78	\$10,167.78	-	-	\$10,167.78	5/28/2021	-
2020	1	12/7/2020	\$10,167.78	\$10,167.78	-	-	\$10,167.78	12/2/2020	-
2019	2	6/5/2020	\$10,167.78	\$10,167.78	-	-	\$10,167.78	5/28/2020	-
2019	1	12/5/2019	\$10,167.78	\$10,167.78	-	-	\$10,167.78	11/26/2019	-
2018	2	6/5/2019	\$10,167.78	\$10,167.78	-	-	\$10,167.78	5/22/2019	-
2018	1	12/6/2018	\$10,167.78	\$10,167.78	-	-	\$10,167.78	11/30/2018	-
2017	2	6/5/2018	\$10,167.78	\$10,167.78	-	-	\$10,167.78	5/21/2018	-
2017	1	12/5/2017	\$10,167.78	\$10,167.78	-	-	\$10,167.78	11/22/2017	-
2016	2	6/5/2017	\$10,167.78	\$10,167.78	-	-	\$10,167.78	5/15/2017	-
2016	1	12/5/2016	\$10,167.78	\$10,167.78	-	-	\$10,167.78	12/2/2016	-
2015	2	6/6/2016	\$9,816.66	\$9,816.66	-	-	\$9,816.66	5/19/2016	-
2015	1	12/7/2015	\$9,816.66	\$9,816.66	-	-	\$9,816.66	11/24/2015	-

Delinquencies may be forwarded to a collection attorney.

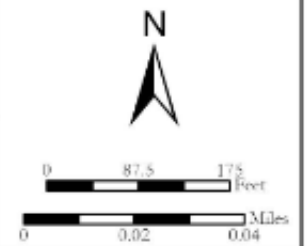
TACS (Taxing Authority Consulting Services, PC)  
for collection (VA Code §58.1-3919.1).

# Property Map



James City County, Virginia  
 Tax Parcel #: 3130100012A

DISCLAIMER: This drawing is neither a legally recorded map nor a survey and is not intended to be used as such. The information displayed is a compilation of records, information, and data obtained from various sources, and James City County is not responsible for its accuracy or how current it may be.



# **Tab F:**

RESNET Rater Certification (MANDATORY)



## Appendix F RESNET Rater Certification of Development Plans

I certify that the development's plans and specifications incorporate all items for the required baseline energy performance as indicated in Virginia's Qualified Allocation Plan (QAP).

If the plans and specifications do not include requirements to meet the QAP baseline energy performance, those requirements still must be met, even though the application is accepted for credits.

\*\*\*Please note that this may make the Application ineligible for credits. The Requirements apply to any new, adaptive reuse, or rehabilitated development (including those serving elderly and/or physically disabled households).

**In addition, provide HERS rating documentation as specified in the manual.**

**New Construction** – EnergyStar Certification

The development's design meets the criteria for the EnergyStar Certification. Rater understands that before issuance of IRS Form 8609, the applicant will obtain and provide EnergyStar Certification to Virginia Housing.

**Rehabilitation** – 30% performance increase over existing, based on HERS index.

Or, it must provide evidence of a HERS Index of 80 or lower. The rater understands that before IRS Form 8609 is issued, the rater must provide Virginia Housing with energy performance certification.

**Adaptive Reuse** – Must provide evidence of a HERS index of 95 or lower. The rater understands that before IRS Form 8609 is issued, the rater must provide Virginia Housing with energy performance certification.

**Additional Optional Certification**

I certify that the development's plans and specifications incorporate all items for the certification as indicated below, and I am an accredited verifier of said certification. If the plans and specifications do not include requirements to obtain the certification, those requirements must still be met, even though the application is accepted for credits. Rater understands that before issuance of IRS Form 8609, the applicant will obtain and provide Certification to Virginia Housing.

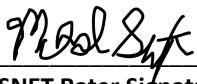
**Earthcraft Certification** - The development's design meets the criteria to obtain Earthcraft Multifamily program gold certification or higher.

**LEED Certification** - The development's design meets the criteria for the U.S. Green Building Council LEED green building certification.

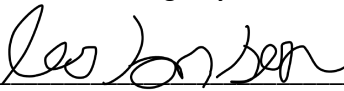
**National Green Building Standard (NGBS)** - The development's design meets the criteria for meeting the NGBS Silver or higher standards to obtain certification

**Enterprise Green Communities**—The development's design meets the requirements stated in the Enterprise Green Communities Criteria for this development's construction type to obtain certification.

**\*\*\*Please Note Raters must have completed 500+ ratings to certify this form\*\*\***

  
RESNET Rater Signature \_\_\_\_\_ Printed Name \_\_\_\_\_ Date \_\_\_\_\_

RESNET Provider Agency \_\_\_\_\_ Provider Contact Name \_\_\_\_\_

  
Contact Signature \_\_\_\_\_ Email \_\_\_\_\_ Phone \_\_\_\_\_

Development Name

# Home Energy Rating Certificate

Projected Report  
Based on Plans

Rating Date: 2026-02-02

Registry ID:

Ekotrope ID: 2JRKx7k2

## HERS® Index Score:

Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit [www.hersindex.com](http://www.hersindex.com)

# 68

## Annual Savings

# \$931

\*Relative to an average U.S. home

### Home:

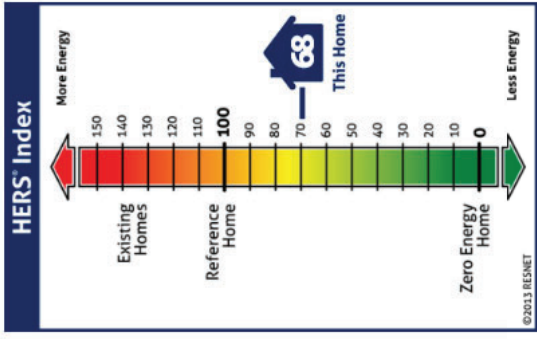
Williamsburg, VA 23188

### Builder:

## Your Home's Estimated Energy Use:

	Use [MBtu]	Annual Cost
Heating	4.9	\$241
Cooling	2.0	\$98
Hot Water	6.3	\$309
Lights/Appliances	10.8	\$531
Service Charges		\$0
Generation (e.g. Solar)	0.0	\$0
<b>Total:</b>	<b>24.0</b>	<b>\$1,179</b>

**This home meets or exceeds the criteria of the following:**



## Home Feature Summary:

Home Type:	Apartment, end unit
Model:	2BR End Lower
Community:	N/A
Conditioned Floor Area:	737 ft <sup>2</sup>
Number of Bedrooms:	2
Primary Heating System:	Air Source Heat Pump • Electric • 7.8 HSPF2
Primary Cooling System:	Air Source Heat Pump • Electric • 15.2 SEER2
Primary Water Heating:	Residential Water Heater • Electric • 0.92 Energy Factor
House Tightness:	8 ACH50 (Adjusted Infiltration: 8.00 ACH50)
Ventilation:	50 CFM • 13 Watts • Exhaust Only
Duct Leakage to Outside:	Untested Forced Air
Above Grade Walls:	R-13
Ceiling:	Adiabatic, R-0
Window Type:	U-Value: 0.3, SHGC: 0.4
Foundation Walls:	N/A
Framed Floor:	N/A

## Rating Completed by:

**Energy Rater:** Michael Sumpter  
RESNET ID: 6933532

**Rating Company:** Lorax LLC  
808 St Paul Street Baltimore MD 21202  
443 449 6319

**Rating Provider:** Energy Efficient Homes Midwest



*Michael Sumpter*

Michael Sumpter, Certified Energy Rater  
Digitally signed: 2/17/26 at 12:37 PM



Energy savings calculated without modifications to the energy model. (As Modeled)

Ekotrope RATER - Version: 5.2.2.3804  
The Energy Rating Disclosure for this home is available from the Approved Rating Provider.  
This report does not constitute any warranty or guarantee.

# Home Energy Rating Certificate

Projected Report  
Based on Plans

Rating Date: 2026-02-02

Registry ID:

Ekotrope ID: 25JWw8WL

## HERS® Index Score:

Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit [www.hersindex.com](http://www.hersindex.com)

# 66

## Annual Savings

# \$1,081

\*Relative to an average U.S. home

## Home:

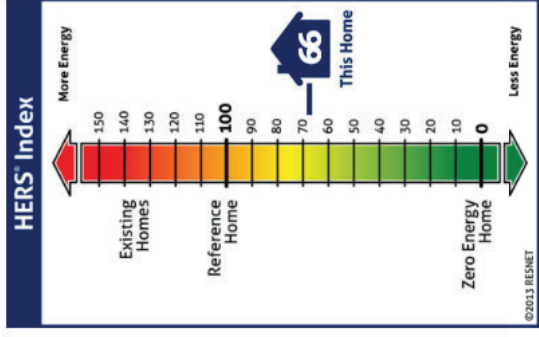
Williamsburg, VA 23188

## Builder:

## Your Home's Estimated Energy Use:

	Use [MBtu]	Annual Cost
Heating	4.7	\$229
Cooling	4.0	\$195
Hot Water	6.2	\$307
Lights/Appliances	11.1	\$545
Service Charges		\$0
Generation (e.g. Solar)	0.0	\$0
<b>Total:</b>	<b>25.9</b>	<b>\$1,276</b>

**This home meets or exceeds the criteria of the following:**



## Home Feature Summary:

Home Type:	Apartment, end unit
Model:	2BR End Upper
Community:	N/A
Conditioned Floor Area:	809 ft <sup>2</sup>
Number of Bedrooms:	2
Primary Heating System:	Air Source Heat Pump • Electric • 7.8 HSPF2
Primary Cooling System:	Air Source Heat Pump • Electric • 15.2 SEER2
Primary Water Heating:	Residential Water Heater • Electric • 0.92 Energy Factor
House Tightness:	8 ACH50 (Adjusted Infiltration: 8.00 ACH50)
Ventilation:	50 CFM • 13 Watts • Exhaust Only
Duct Leakage to Outside:	Untested Forced Air
Above Grade Walls:	R-13
Ceiling:	Vented Attic, R-46
Window Type:	U-Value: 0.3, SHGC: 0.4
Foundation Walls:	N/A
Framed Floor:	R-0

## Rating Completed by:

**Energy Rater:** Michael Sumpter  
RESNET ID: 6933532

**Rating Company:** Lorax LLC  
808 St Paul Street Baltimore MD 21202  
443 449 6319

**Rating Provider:** Energy Efficient Homes Midwest



*Michael Sumpter*

Michael Sumpter, Certified Energy Rater  
Digitally signed: 2/17/26 at 12:37 PM



Energy savings calculated without modifications to the energy model. (As Modeled)

Ekotrope RATER - Version:5.2.2.3804  
The Energy Rating Disclosure for this home is available from the Approved Rating Provider.  
This report does not constitute any warranty or guarantee.

# Home Energy Rating Certificate

Projected Report  
Based on Plans

Rating Date: 2026-02-02

Registry ID:

Ekotrope ID: L7EbRYjv

## HERS® Index Score:

Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit [www.hersindex.com](http://www.hersindex.com)

# 68

## Annual Savings

# \$912

\*Relative to an average U.S. home

### Home:

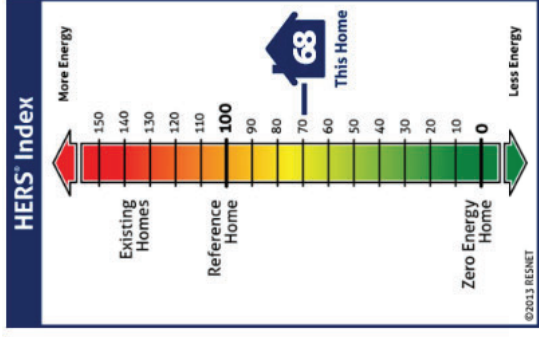
Williamsburg, VA 23188

### Builder:

## Your Home's Estimated Energy Use:

	Use [MBtu]	Annual Cost
Heating	2.8	\$136
Cooling	2.5	\$123
Hot Water	6.3	\$308
Lights/Appliances	10.8	\$531
Service Charges		\$0
Generation (e.g. Solar)	0.0	\$0
<b>Total:</b>	<b>22.3</b>	<b>\$1,099</b>

**This home meets or exceeds the criteria of the following:**



## Home Feature Summary:

Home Type:	Apartment, inside unit
Model:	2BR Mid Lower
Community:	N/A
Conditioned Floor Area:	737 ft <sup>2</sup>
Number of Bedrooms:	2
Primary Heating System:	Air Source Heat Pump • Electric • 7.8 HSPF2
Primary Cooling System:	Air Source Heat Pump • Electric • 15.2 SEER2
Primary Water Heating:	Residential Water Heater • Electric • 0.92 Energy Factor
House Tightness:	8 ACH50 (Adjusted Infiltration: 10.88 ACH50)
Ventilation:	50 CFM • 13 Watts • Exhaust Only
Duct Leakage to Outside:	Untested Forced Air
Above Grade Walls:	R-13
Ceiling:	Adiabatic, R-0
Window Type:	U-Value: 0.3, SHGC: 0.4
Foundation Walls:	N/A
Framed Floor:	N/A

## Rating Completed by:

**Energy Rater:** Michael Sumpter  
RESNET ID: 6933532

**Rating Company:** Lorax LLC  
808 St Paul Street Baltimore MD 21202  
443 449 6319

**Rating Provider:** Energy Efficient Homes Midwest



*Michael Sumpter*

Michael Sumpter, Certified Energy Rater  
Digitally signed: 2/17/26 at 12:37 PM



Energy savings calculated without modifications to the energy model. (As Modeled)

Ekotrope RATER - Version:5.2.2.3804  
The Energy Rating Disclosure for this home is available from the Approved Rating Provider.  
This report does not constitute any warranty or guarantee.

# Home Energy Rating Certificate

Projected Report

Based on Plans

Rating Date: 2026-02-02

Registry ID:

Ekotrope ID: vyzb78o2

## HERS® Index Score:

Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit [www.hersindex.com](http://www.hersindex.com)

# 68

## Annual Savings

# \$1,052

\*Relative to an average U.S. home

### Home:

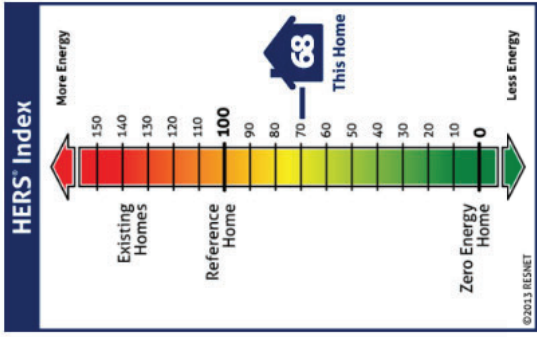
Williamsburg, VA 23188

### Builder:

## Your Home's Estimated Energy Use:

	Use [MBtu]	Annual Cost
Heating	4.0	\$199
Cooling	3.9	\$191
Hot Water	6.2	\$307
Lights/Appliances	11.1	\$545
Service Charges		\$0
Generation (e.g. Solar)	0.0	\$0
<b>Total:</b>	<b>25.2</b>	<b>\$1,241</b>

**This home meets or exceeds the criteria of the following:**



## Home Feature Summary:

Home Type:	Apartment, inside unit
Model:	2BR Mid Upper
Community:	N/A
Conditioned Floor Area:	809 ft <sup>2</sup>
Number of Bedrooms:	2
Primary Heating System:	Air Source Heat Pump • Electric • 7.8 HSPF2
Primary Cooling System:	Air Source Heat Pump • Electric • 15.2 SEER2
Primary Water Heating:	Residential Water Heater • Electric • 0.92 Energy Factor
House Tightness:	8 ACH50 (Adjusted Infiltration: 11.41 ACH50)
Ventilation:	50 CFM • 13 Watts • Exhaust Only
Duct Leakage to Outside:	Untested Forced Air
Above Grade Walls:	R-13
Ceiling:	Vented Attic, R-43
Window Type:	U-Value: 0.3, SHGC: 0.4
Foundation Walls:	N/A
Framed Floor:	R-0

## Rating Completed by:

**Energy Rater:** Michael Sumpter  
RESNET ID: 6933532

**Rating Company:** Lorax LLC  
808 St Paul Street Baltimore MD 21202  
443 449 6319

**Rating Provider:** Energy Efficient Homes Midwest



*Michael Sumpter*

Michael Sumpter, Certified Energy Rater  
Digitally signed: 2/17/26 at 12:37 PM



Energy savings calculated without modifications to the energy model. (As Modeled)

Ekotrope RATER - Version: 5.2.2.3804  
The Energy Rating Disclosure for this home is available from the Approved Rating Provider.  
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*Michael Sumpter*

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Summary After ROUGH Inspection

Scoring Tool Version: 4.1.1.27 Revision Date: 2/28/2024

**Project ID:** None entered on "Overview (Verification)" Sheet

**Builder/Applicant:** None entered on "Overview (Verification)" Sheet

**Address of Home:** 226 Burton Woods Dr, Williamsburg, Virginia 23188

**Community/Lot #:** None entered on "Overview (Verification)" Sheet

**Climate Zone:** 4 Moist

**Certification Level - As Designed:** Silver

**Building Type:** Multifamily

**Number of Units:** 48

**Conditioned Square Footage:** 6184

**Project Description:**

Chapter	Designer	Rough Points claimed by Verifier
CHAPTER 5 LOT DESIGN	36	36
CHAPTER 6 RESOURCE EFFICIENCY	28	31
CHAPTER 7 ENERGY EFFICIENCY	Silver	Silver
CHAPTER 8 WATER EFFICIENCY	Emerald	Emerald
CHAPTER 9 INDOOR ENVIRONMENTAL QUALITY	63	63
CHAPTER 10 OPERATION, MAINTENANCE	15	15
Total	142	145

Minimum Points from chapters 5, 6, 9, and 10:

BRONZE	SILVER	GOLD	EMERALD
88	125	181	225

**Builder Comments:**

**Name:**

**Email:**

**Phone:**

**Date:**

**Verifier Comments:**

Chapter  
 Points  
 R/F

Chapter Points R/F	Goal Level:	Silver	© Home Innovation Research Labs, Inc., 2020. All rights reserved. ICC 700-2020 NGBS®	Version: 4.1.27	Home Address: 226 Burton Woods Dr, Williamsburg, Virginia 23188			
	Overall Points: 145,	Overall Level: Silver		Rev. Date: 2/28/2024	Community/Lot #:			
	Points: Ch5: 36, Ch6: 31, Ch7: Silver, Ch8: Emerald, Ch9: 63, Ch10: 15							
	Report Phase:	Rough						
Practice #	Practice	Points Available	Points Claimed	Points Awarded	Status	Verifier Notes	Design Phase Notes	
5	RF	11.500	LOT DESIGN, PREPARATION AND DEVELOPMENT	11.500.0 Intent. This section applies to the lot and changes to the lot due to remodeling of an existing building.				
5	RF	11.501	LOT SELECTION	11.501.2 Multi-modal transportation. A range of multi-modal transportation choices are promoted by one or more of the following:			None	
5	RF	(1)	The building is located within one-half mile (805 m) of pedestrian access to a mass transit system.	6	6	6	Bus stop at entrance to site	
5	RF	(2)	The building is located within five miles (8,046 m) of a mass transit station with provisions for parking.	3	0	0	None	
5	RF	(3)	The building is located within one-half mile (805 m) of six or more community resources. No more than two each of the following use category can be counted toward the total: Recreation, Retail, Civic, and Services. Examples of resources in each category include, but are not limited to the following: Recreation: recreational facilities (such as pools, tennis courts, basketball courts), parks. Retail: grocery store, restaurant, retail store. Civic: post office, place of worship, community center. Services: bank, daycare center, school, medical/dental office, Laundromat/dry cleaners. NOTE: List the 6 community resources in the Notes field.	4	0	0	None	
5	RF		OR A lot is selected within a census block group that, compared to its region, has above-average neighborhood walkability using an index within the EPA's Smart Location Database:		0	0	None	
5	RF	(a)	Walkability is within the top quartile for the region.	5				
5	RF	(b)	Walkability is within the second quartile for the region.	2				
5	RF	(4)	The building is on a lot located within a community that has rights-of-way specifically dedicated to bicycle use in the form of paved paths or bicycle lanes, or is on an infill lot located within 1/2 mile of a bicycle lane designated by the jurisdiction.	5	0	0	None	
5	RF	(5)	Dedicated bicycle parking and racks are constructed for mixed-use and multifamily buildings:		0	0	None	
5	RF	(a)	Minimum of 1 bicycle parking space per 3 residential units	2				
5	RF	(b)	Minimum of 1 bicycle parking space per 2 residential units	4				
5	RF	(c)	Minimum of 1 bicycle parking space per 1 residential unit.	6				
5	RF	(d)	Bicycle enclosed storage is provided or parking spaces are covered or otherwise protected from the elements.	2 points per (a) - (c)			None	
5	RF	(6)	The remodel includes the new development and implementation of a community scale bike sharing. NOTE: Enter name of the bike sharing program in the Notes field.	3	0	0	None	
5	RF	(7)	The remodel includes the new development and implementation of a community scale motorized vehicle sharing program. NOTE: Enter name of the car sharing program in the Notes field.	5	0	0	None	
5	RF	11.502	PROJECT TEAM, MISSION STATEMENT, AND GOALS	11.502.1 Project team, mission statement, and goals. A knowledgeable team is established and team member roles are identified with respect to green lot design, preparation, and development. The project's green goals and objectives are written into a mission statement.	4	0	0	None
5	RF	11.503	LOT DESIGN	11.503.0 Intent. The lot is designed to avoid detrimental environmental impacts first, to minimize any unavoidable impacts, and to mitigate for those impacts that do occur. The project is designed to minimize environmental impacts and to protect, restore, and enhance the natural features and environmental quality of the lot. (Points awarded only if the intent of the design is implemented.)			None	
5	R	11.503.1	Natural resources. Natural resources are conserved by one or more of the following:				None	
5	R	(1)	A natural resources inventory is completed under the direction of a qualified professional.	5	0	0		
5	R	(2)	A plan is implemented to conserve the elements identified by the natural resource inventory as high-priority resources.	6	0	0		
5	R	(3)	Items listed for protection in the natural resource inventory plan are protected under the direction of a qualified professional.	4	0	0		
5	R	(4)	Basic training in tree or other natural resource protection is provided for the on-site supervisor.	4	0	0		
5	R	(5)	All tree pruning on-site is conducted by a certified arborist or other qualified professional.	3	0	0		
5	R	(6)	Ongoing maintenance of vegetation on the lot during construction is in accordance with TCIA A300 or locally accepted best practices.	4	0	0		
5	R	(7)	Where a lot adjoins a landscaped common area, a protection plan from the remodeling construction activities next to the common area is implemented.	5	0	0		
5	R	(8)	Developer has a plan to design and construct the lot in accordance with the International Wildland-Urban Interface Code (IWUIC). [Only applicable where the AHJ has not declared a wildland-urban interface area, but a fire protection engineer, certified fire marshal, or other qualified party has determined and documented the site as hazarded per the IWUIC.]	6	0	0		
5	RF	11.503.2	Slope disturbance. Slope disturbance is minimized by one or more of the following: Note: Points are only available for lots with slopes of 25% or greater.				Max Slope in Const. Zn:	
5	RF	(1)	The use of terrain-adaptive architecture.	5	0	0		
5	RF	(2)	Hydrological/soil stability study is completed and used to guide the design of any additions to buildings on the lot.	5	0	0		
5	RF	(3)	All or a percentage of new driveways and parking are aligned with natural topography to reduce cut and fill.		0	0		
5	RF	(a)	10 percent to < 25 percent	1				
5	RF	(b)	25 percent to 75 percent	4				
5	RF	(c)	greater than 75 percent	6				
5	RF	(4)	Long-term erosion effects are reduced through the design and implementation of clustering, terracing, retaining walls, landscaping, or rehabilitation techniques.	6	0	0		
5	RF	(5)	Underground parking uses the natural slope for parking entrances.	5	0	0		
5	R	11.503.3	Soil disturbance and erosion. Soil disturbance and erosion are minimized by one or more of the following: (also see Section 11.504.3) Note: Points must be earned in 11.503.3 in order for points in 11.504.1 to be available.				None	
5	R	(1)	Remodeling construction activities are scheduled such that disturbed soil that is to be left unworked for more than 21 days is stabilized within 14 days.	2	0	0		
5	R	(2)	The new utilities on the lot are designed to use one or more alternative means:	2	0	0		
5	R	(a)	tunneling instead of trenching					
5	R	(b)	use of smaller (low ground pressure) equipment or geomats to spread the weight of construction equipment					
5	R	(c)	shared utility trenches or easements					
5	R	(d)	placement of utilities under paved surfaces instead of yards					
5	R	(3)	Limits of new clearing and grading are demarcated on the lot plan.	5	5	5		
5	RF	11.503.4	Stormwater Management. The stormwater management system is designed to use low impact development/green infrastructure practices to preserve, restore or mitigate changes in site hydrology due to land disturbance and the construction of impermeable surfaces through the use of one or more of the following techniques: NOTE: For lots in a development, the points for 503.4 may be awarded for the lot when there is a community storm water management plan implemented and the builder does not violate that plan with respect to water leaving the lot.				None	
5	R	(1)	A site assessment is conducted and a plan prepared and implemented that identifies important existing permeable soils, natural drainage ways and other water features, e.g., depressional	7	0	0	None	

5	R		storage, onsite to be preserved in order to maintain site hydrology.						
5	R	(2)	Low Impact Development/Green infrastructure stormwater management practices to promote infiltration and evapotranspiration are used to manage rainfall on the lot and prevent the off-lot discharge of runoff from all storms up to and including the volume of following storm events:	0	0				None
5	R								
5	R	(a)	80th percentile storm event	5					
5	R	(b)	90th percentile storm event	8					
5	R	(c)	95th percentile storm event	10					
5	RF	(3)	Permeable materials are used for driveways, parking areas, walkways, patios, and recreational surfaces and the like according to the following percentages:		0	0			None
5	RF	(a)	10 percent to less than 25 percent (add 2 points for use of vegetative paving system)	5					
5	RF	(b)	25-50 percent (add 4 points for use of vegetative paving system)	8					
5	RF	(c)	Greater than 50 percent (add 6 points for use of vegetative paving system)	10					
5	RF		[Points for vegetative paving systems are only awarded for locations receiving more than 20 inches per year of annual average precipitation.]	0	0	0			None
5	RF	(4)	Complete gutter and downspout system directs storm water away from foundation to vegetated landscape area, a raingarden, or catchment system that provides for water infiltration.	8	0	0			None
5	RF								
5	F	11.503.5	11.503.5 Landscape plan. A plan for the lot is developed to limit water and energy use while preserving or enhancing the natural environment.						None
5	F		(Where "front" only or "rear" only plan is implemented, only half of the points (rounding down to a whole number) are awarded for items 11-18)						
5	F	(1)	A plan is formulated and implemented that protects, restores, or enhances natural vegetation on the lot.	0	0	0			None
5	F	(a)	100 percent of the natural area	0					
5	F	(b)	50 percent of the natural area	0					
5	F	(c)	25 percent of the natural area	0					
5	F	(d)	12 percent of the natural area	0					
5	F	(2)	Non-invasive vegetation that is native or regionally appropriate for local growing conditions is selected to promote biodiversity.	0	0	0			None
5	F	(3)	To improve pollinator habitat, at least 10 percent of planted areas are composed of native or regionally appropriate flowering and nectar producing plant species. Invasive plant species shall not be utilized.	0	0	0			None
5	F	(4)	EPA WaterSense Water Budget Tool or equivalent is used when implementing the site vegetative design.	0	0	0			None
5	F	(5)	Where turf is being planted, Turfgrass Water Conservation Alliance (TWCA) or equivalent as determined by the adopting entity third party qualified water efficient grasses are used.	0	0	0			None
5	F	(6)	For landscaped vegetated areas, the maximum percentage of all turf areas is:	0	0	0			None
5	F	(a)	0 percent	0					
5	F	(b)	Greater than 0 percent to less than 20 percent	0					
5	F	(c)	20 percent to less than 40 percent	0					
5	F	(d)	40 percent to 60 percent	0					
5	F	(7)	Plants with similar watering needs are grouped (hydrozoning) and shown on the lot plan.	0	0	0			None
5	F	(8)	Summer shading by planting installed to shade a minimum of 30 percent of building walls. To conform to summer shading, the effective shade coverage (five years after planting) is the arithmetic mean of the shade coverage calculated at 10 am for eastward facing walls, noon for southward facing walls, and 3 pm for westward facing walls on the summer solstice.	0	0	0			None
5	F	(9)	Vegetative wind breaks or channels are designed to protect the lot and immediate surrounding lots as appropriate for local conditions.	0	0	0			None
5	F	(10)	Site- or community-generated tree trimmings or stump grinding of regionally appropriate trees are used on the site to provide protective mulch during construction or for landscaping.	3	0	0			None
5	F	(11)	An integrated pest management plan is developed to minimize chemical use in pesticides and fertilizers.	4	0	0			None
5	F	(12)	Developer has a plan for removal or containment of invasive plants from the disturbed areas of the site.	3	0	0			None
5	F	(13)	Developer implements a plan for removal or containment of invasive plants on the undisturbed areas of the site.	6	0	0			None
5	F	11.503.6	11.503.6 Wildlife habitat. Measures are planned to support wildlife habitat and include at least two of the following:		0	0			None
5	F	(1)	Plants and gardens that encourage wildlife, such as bird and butterfly gardens.	3					
5	F	(2)	Inclusion of a certified "backyard wildlife" program.	3					
5	F	(3)	The lot is adjacent to a wildlife corridor, fish and game park, or preserved areas and is designed with regard for this relationship.	3					
5	F	(4)	Outdoor lighting techniques are utilized with regard for wildlife.	3					
5	P	11.503.7	11.503.7 Environmentally sensitive areas. The lot is in accordance with one or both of the following:		4	4			None
5	P	(1)	The lot does not contain any environmentally sensitive areas that are disturbed during remodeling.	4					
5	P	(2)	On lots with environmentally sensitive areas, mitigation and/or restoration is conducted to preserve ecosystem functions lost through remodeling activities.	4					
5	P								
5	RF		<b>11.504 LOT CONSTRUCTION</b>						
5	RF	11.504.0	11.504.0 Intent. Environmental impact during construction is avoided to the extent possible; impacts that do occur are minimized, and any significant impacts are mitigated.						
5	RF	11.504.1	11.504.1 On-site supervision and coordination. On-site supervision and coordination is provided during on-the-lot clearing, grading, trenching, paving, and installation of utilities to ensure that specified green development practices are implemented. (also see Section 11.503.3)	4	0	0			None
5	RF		NOTE: Points must be taken in 11.503.3 to claim points in 11.504.1.						
5	R	11.504.2	11.504.2 Trees and vegetation. Designated trees and vegetation are preserved by one or more of the following:						None
5	R	(1)	Fencing or equivalent is installed to protect trees and other vegetation.	3	0	0			
5	R	(2)	Trenching, significant changes in grade, and compaction of soil and critical root zones in all "tree save" areas as shown on the lot plan are avoided.	5	0	0			
5	R	(3)	Damage to designated existing trees and vegetation is mitigated during construction through pruning, root pruning, fertilizing, and watering.	4	0	0			
5	RF	11.504.3	11.504.3 Soil disturbance and erosion implementation. On-site soil disturbance and erosion during remodeling are minimized by one or more of the following in accordance with the SWPPP or applicable plan: (also see Section 11.503.3)						None
5	R	(1)	Sediment and erosion controls are installed on the lot and maintained in accordance with the stormwater pollution prevention plan, where required.	5	0	0			None
5	R	(2)	Limits of clearing and grading are staked out on the lot.	5	0	0			None
5	R	(3)	"No disturbance" zones are created using fencing or flagging to protect vegetation and sensitive areas on the lot from construction activity.	5	0	0			None
5	R	(4)	Topsoil from either the lot or the site development is stockpiled and stabilized for later use and used to establish landscape plantings on the lot.	5	0	0			None
5	R	(5)	Soil compaction from construction equipment is reduced by distributing the weight of the equipment over a larger area (laying lightweight geogrids, mulch, chipped wood, plywood, OSB, metal plates, or other materials capable of weight distribution in the pathway of the equipment).	4	0	0			None
5	R	(6)	Disturbed areas on the lot that are complete or to be left unworked for 21 days or more are stabilized within 14 days using methods as recommended by the EPA, or in the approved SWPPP, where required.	3	0	0			None
5	RF	(7)	Soil is improved with organic amendments or mulch.	3	0	0			None
5	RF	(8)	Newly installed utilities on the lot are installed using one or more alternative means: tunneling instead of trenching, use of smaller equipment, use of low ground pressure equipment, use of geomats, shared utility trenches or easements, other.	5	0	0			None
5	RF		NOTE: List "other" means of installing utilities in the assigned Notes area.						

11.505 INNOVATIVE PRACTICES							
5	RF	11.505.0	11.505.0 Intent. Innovative lot design, preparation and development practices are used to enhance environmental performance. Waivers or variances from local development regulations are obtained, and innovative zoning is used to implement such practices.				
5	P	11.505.1	11.505.1 Driveways and parking areas. Driveways and parking areas are minimized or mitigated by one or more of the following:				
5	F	(1)	Off-street parking areas are shared or driveways are shared. Waivers or variances from local development regulations are obtained to implement such practices, if required.	5	0	0	None
5	P	(2)	In a multifamily project, parking capacity does not exceed the local minimum requirements.	5	5	5	Required 101 spaces, provided 78 spaces
5	F	(3)	Structured parking is utilized to reduce the footprint of surface parking areas.		0	0	None
5	F	(a)	25 percent to less than 50 percent	4			
5	F	(b)	50 percent to 75 percent	5			
5	F	(c)	greater than 75 percent	6			
5	F	11.505.2	11.505.2 Heat Island mitigation. Heat island effect is mitigated by one or both of the following.				
5	F	(1)	Hardscape: Not less than 75 percent of the surface area of the hardscape on the lot meets one or a combination of the following methods.	5	0	0	None
5	F	(a)	Shading of hardscaping: Shade is provided from existing or new vegetation (within five years) or from trellises. Shade of hardscaping is to be measured on the summer solstice at noon.				
5	F	(b)	Light-colored hardscaping: Horizontal hardscaping materials are installed with a solar reflectance index (SRI) of 29 or greater. The SRI is calculated in accordance with ASTM E1980. A default SRI value of 35 for new concrete without added color pigment is permitted to be used instead of measurements.				
5	F	(c)	Permeable hardscaping: Permeable hardscaping materials are installed.				
5	F	(2)	Roofs: Not less than 75 percent of the exposed surface of the roof is vegetated using technology capable of withstanding the climate conditions of the jurisdiction and the microclimate conditions of the building lot. Invasive plant species are not permitted.	5	0	0	None
5	P	11.505.3	11.505.3 Density. The average density on the lot on a net developable area basis is:		4	4	13.8du/acre
5	P	(1)	7 to less than 14 dwelling units per acre (per 4,047 m <sup>2</sup> )	4			
5	P	(2)	14 to less than 21 dwelling units per acre (per 4,047 m <sup>2</sup> )	5			
5	P	(3)	21 to less than 35 dwelling units per acre (per 4,047 m <sup>2</sup> )	6			
5	P	(4)	35 to less than 70 dwelling units per acre (per 4,047 m <sup>2</sup> )	7			
5	P	(5)	70 or greater dwelling units per acre (per 4,047 m <sup>2</sup> )	8			
5	RF	11.505.4	11.505.4 Mixed-use development.				
5	RF	(1)	The lot contains a mixed-use building.	8	0	0	None
5	RF	11.505.5	11.505.5 Multifamily or mixed-use community garden(s). Local food production to residents or area consumers.				
5	RF	(a)	A portion of the lot of at least 250 sq ft is established as community garden(s) for the residents of the site. [*3 points per 250 sq ft]	9 max	0	0	Community Garden (sf): None
5	RF	(b)	Locate the project within a 0.5-mile walking distance of an existing or planned farmers market/ farm stand that is open or will operate at least once a week for at least five months of the year.	3	0	0	None
5	RF	(c)	Areas and physical provisions are provided for composting.	1	0	0	None
5	RF	(d)	Signs designating the garden area are posted.	1	0	0	None
5	F	11.505.6	11.505.6 Multi-unit plug-in electric vehicle charging. Plug-in electric vehicle charging capability is provided for not fewer than 2 percent of parking stalls. [An additional 2 points can be earned for each percentage point above 2% for a maximum of 10 points]	4 (10 max)	0	0	None
5	F		Fractional values shall be rounded up to the nearest whole number. Electrical capacity in main electric panels supports Level 2 charging (208/240V up to 80 amps or in accordance with SAE J1772). Each stall is provided with conduit and wiring infrastructure from the electric panel to support Level 2 charging (208/240V up to 80 amps or in accordance with SAE J1772) service to the designated stalls, and stalls are equipped with either Level 2 charging AC grounded outlets (208/240V up to 80 amps or in accordance with SAE J1772) or Level 2 charging stations (208-240V/80A) by a third party charging station.				
5	F		NOTE: SF/BTR homes are also eligible if 2% or more of the total of shared/communal/visitor parking stalls in the development/community have plug-in electric vehicle charging capability.				
5	F	11.505.7	11.505.7 Multi-unit residential CNG vehicle fueling. CNG vehicle residential fueling appliances are provided for at least 1 percent of the parking stalls. The CNG fueling appliances shall be listed in accordance with ANSI/CSA NGV 5.1 and installed in accordance to the appliance manufacturer's installation instructions.	4	0	0	None
5	F		NOTE: Single-Family/Build-to-Rent homes are also eligible if 1% of the shared/communal/visitor parking stalls in the development have residential CNG vehicle refueling.				
5	RF	11.505.8	11.505.8 Street network. Project is located in an area of high intersection density.	5	0	0	None
5	P	11.505.9	11.505.9 Smoking prohibitions. Signs are provided on multifamily and mixed-use lots prohibiting smoking at the following locations:				
5	F		NOTE: Build-to-rent homes are also eligible for (a), (b) and (c) if smoking is prohibited and signs posted for all homes in the development/community. SF homes for sale are not eligible.				
5	P	(a)	Smoking is prohibited within 25 feet (7.5 m) of all building exterior doors and operable windows or building air intakes within 15 (4.5 m) vertical feet of grade or a walking surface.	3	3	3	None
5	P	(b)	Smoking is prohibited on decks, balconies, patios and other occupied exterior spaces.	3	3	3	None
5	P	(c)	Smoking is prohibited at all parks, playgrounds, and community activity or recreational spaces.	3	3	3	None
5	P	11.505.10	11.505.10 Exercise & Recreation Area. For multifamily buildings, on-site dedicated recreation space for exercise or play opportunities for adults and/or children open and accessible to residents is provided.				
5	F	(a)	A dedicated area of at least 400 square feet is provided inside the building with adult exercise and/or children's play equipment.	3	0	0	None
5	F	(b)	A courtyard, garden, terrace, or roof space at least 10% of the lot area that can serve as outdoor space for children's play and /or adult activities is provided.	3	0	0	None
5	P	(c)	Active play/recreation areas are illuminated at night to extend opportunities for physical activity into the evening.	3	3	3	None
5	F	11.505.11	11.505.11 Battery storage system. A battery storage system of not less than 6 kWh of available capacity is installed that stores electric energy from an on-site renewable electric generation system or is grid-interactive or can perform both functions.	2	0	0	None

11.601 QUALITY OF CONSTRUCTION MATERIALS AND WASTE										
6 P	RF	11.601.0	11.601.0 Intent. Design and construction practices that minimize the environmental impact of the building materials are incorporated, environmentally efficient building systems and materials are incorporated, and waste generated during construction is reduced.							
6 P	R	11.601.1	11.601.1 Conditioned floor area. Finished floor area of a dwelling unit or sleeping unit after the remodeling is limited. Finished floor area is calculated in accordance with ANSI Z765 for single family and ANSI/BOMA 265.4 for multifamily buildings. Only the finished floor area for stories above grade plane is included in the calculation.	6	6					None
6 P	R	(1)	less than or equal to 700 square feet (65 m <sup>2</sup> )	14						
6 P	R	(2)	less than or equal to 1,000 square feet (93 m <sup>2</sup> )	12						
6 P	R	(3)	less than or equal to 1,500 square feet (139 m <sup>2</sup> )	9						
6 P	R	(4)	less than or equal to 2,000 square feet (186 m <sup>2</sup> )	6						
6 P	R	(5)	less than or equal to 2,500 square feet (232 m <sup>2</sup> )	3						
6 P	R	(6)	greater than 4,000 square feet (372 m <sup>2</sup> )	N/A						
6 P	R		(For every 100 square feet (9.29 m <sup>2</sup> ) over 4,000 square feet (372 m <sup>2</sup> ), one point is to be added the threshold points shown in Table 305.3.7 for each rating level.)							
6 P	R		Multifamily Building Note: For a multifamily building, a weighted average of the individual unit sizes is used for this practice.							
6 R	R	11.601.2	11.601.2 Material usage. Newly installed structural systems are designed or construction techniques are implemented that reduce and optimize material usage.							
6 R	R		(Points awarded only when the newly installed portion of each structural system comprises at least 25 percent of the total area of that structural system after the remodel)							
6 R	R	(1)	Minimum structural member or element sizes necessary for strength and stiffness in accordance with advanced framing techniques or structural design standards are selected.	3	0	0	<input type="checkbox"/>			None
6 R	R	(2)	Higher-grade or higher-strength of the same materials than commonly specified for structural elements and components in the building are used and element or component sizes are reduced accordingly.	3	0	0	<input type="checkbox"/>			None
6 R	R	(3)	Performance-based structural design is used to optimize lateral force-resisting systems.	3	0	0	<input type="checkbox"/>			None
6 R	R	11.601.3	11.601.3 Building dimensions and layouts. Building dimensions and layouts are designed to reduce material cuts and waste. This practice is used for a minimum of 80 percent of the newly installed areas:							
6 R	R		(Points awarded only when the newly installed area of the building comprises at least 25 percent of the total area of that element of the building after the remodel)							
6 R	R	(1)	floor area	3	0	0	<input type="checkbox"/>			None
6 R	R	(2)	wall area	3	0	0	<input type="checkbox"/>			None
6 R	R	(3)	roof area	3	0	0	<input type="checkbox"/>			None
6 R	R	(4)	cladding or siding area	3	0	0	<input type="checkbox"/>			None
6 R	R	(5)	penetrations or trim area	1	0	0	<input type="checkbox"/>			None
6 R	R	11.601.4	11.601.4 Framing and structural plans. Detailed framing or structural plans, material quantity lists and on-site cut lists for newly installed framing, structural materials, and sheathing materials are provided.	4	0	0	<input type="checkbox"/>			None
6 R	R	11.601.5	11.601.5 Prefabricated components. Precut or preassembled components, or panelized or precast assemblies are utilized for a minimum of 90 percent for the following system or building:	13 Max						
6 R	R		(Points awarded only when the newly installed system comprises at least 25 percent of the total area of that system of the building after the remodel)							
6 R	R	(1)	floor system	4	0	0	<input type="checkbox"/>			None
6 R	R	(2)	wall system	4	0	0	<input type="checkbox"/>			None
6 R	R	(3)	roof system	4	0	0	<input type="checkbox"/>			None
6 R	R	(4)	modular construction for any new construction located above grade	13	0	0	<input type="checkbox"/>			None
6 P	R	11.601.6	11.601.6 Stacked stories. Stories above grade are stacked, such as in 1½-story, 2-story, or greater structures. The area of the upper story is a minimum of 50 percent of the area of the story below based on areas with a minimum ceiling height of 7 feet (2,134 mm).	8 Max	4	4		from overview: 2 story bldg.		None
6 P	R	(1)	first stacked story	4						
6 P	R	(2)	for each additional stacked story	2						
6 P	RF	11.601.7	11.601.7 Prefinished materials. Prefinished building materials or assemblies listed below have no additional site-applied finishing material are installed.	12 Max	2	5				None
6 P	RF		(Points awarded for each type of material or assembly.)							
6 P	RF	(a)	interior trim not requiring paint or stain				<input type="checkbox"/>			
6 P	RF	(b)	exterior trim not requiring paint or stain				<input type="checkbox"/>			
6 P	RF	(c)	window, skylight, and door assemblies not requiring paint or stain on one of the following surfaces:				<input type="checkbox"/>			
6 P	RF	i.	exterior surfaces				<input type="checkbox"/>			
6 P	RF	ii.	interior surfaces				<input type="checkbox"/>			
6 P	RF	(d)	interior wall coverings or systems, floor systems, and/or ceiling systems not requiring paint or stain or other type of finishing application				<input type="checkbox"/>			
6 P	RF	(e)	exterior wall coverings or systems, floor systems, and/or ceiling systems not requiring paint or stain or other type of finishing application				<input type="checkbox"/>	90% or more		
6 P	RF	(1)	90 percent or more (after the remodel) of the installed building materials or assemblies listed above:	5						
6 P	RF	(2)	50 percent to less than 90 percent (after the remodel) of the installed building material or assembly listed above:	2						
6 P	RF	(3)	35 percent to less than 50 percent (after the remodel) of the installed building material or assembly listed above:	1						
6 R	R	11.601.8	11.601.8 Foundations. A foundation system that minimizes soil disturbance, excavation quantities and material usage, such as frost-protected shallow foundations, isolated pier and pad foundations, deep foundations, post foundations, or helical piles is selected, designed, and constructed. The foundation is used on 25 percent or more of the building footprint after the remodel.	3	0	0	<input type="checkbox"/>			None
6 R	R		NOTE: Indicate in the assigned Notes area the type designed and constructed: frost-protected shallow foundations, pier and pad foundations, post foundations, or other similar foundation type.							
11.602 ENHANCED DURABILITY AND REDUCED MAINTENANCE										
6 P	RF	11.602.0	11.602.0 Intent. Design and construction practices are implemented that enhance the durability of materials and reduce in-service maintenance.							
6 P	RF	11.602.1	11.602.1 Moisture Management – Building Envelope							
6 P	R	11.602.1.1	11.602.1.1 Capillary breaks							
6 P	R	11.602.1.1.1	11.602.1.1.1 Capillary breaks A capillary break and vapor retarder are installed at concrete slabs in accordance with ICC IRC Sections R506.2.2 and R506.2.3 or ICC IBC Sections 1907 and 1805.4.1.	Mandatory			N/A	No moisture issues		No moisture issues
6 P	R		This practice is not mandatory for existing slabs without apparent moisture problem.				<input type="checkbox"/>			
6 R	R	11.602.1.1.2	11.602.1.1.2 A capillary break to prevent moisture migration into foundation wall is provided between the footing and the foundation wall on all new foundations, and on not less than 25 percent of the total length of the foundation after the remodel.	3	0	0	<input type="checkbox"/>			None
6 R	R	11.602.1.2	11.602.1.2 Foundation waterproofing. Enhanced foundation waterproofing is installed on all new foundations, and on not less than 25 percent of the total length of the foundation after the remodel using one or both of the following:	4	0	0				None
6 R	R	(1)	rubberized coating, or				<input type="checkbox"/>			
6 R	R	(2)	drainage mat				<input type="checkbox"/>			
6 P	R	11.602.1.3	11.602.1.3 Foundation drainage							
6 P	R	11.602.1.3.1	11.602.1.3.1 Where required by the ICC IRC or IBC for habitable and usable spaces below grade, exterior drain tile is installed.	Mandatory			N/A			None
6 P	R		This practice is not mandatory for existing space without apparent moisture problem.				<input type="checkbox"/>			
6 R	R	11.602.1.3.2	11.602.1.3.2 Interior and exterior foundation perimeter drains are installed and sloped to discharge to daylight, dry well, or sump pit on all new foundations and not less than 25 percent of the total length of the foundation after the remodel.	4	0	0	<input type="checkbox"/>			None
6 R	R	11.602.1.4	11.602.1.4 Crawlspace							
6 R	R	11.602.1.4.1	11.602.1.4.1 Vapor retarder for all new unconditioned vented crawlspace foundations and not less than 25 percent of the total area after the remodel is in accordance with the following, as applicable. Joints of vapor retarder overlap a minimum of 6 inches (152 mm) and are taped.							
6 R	R	(1)	Floors. Minimum 6 mil vapor retarder installed on the crawlspace floor and extended at least 6	6	0	0	<input type="checkbox"/>			None

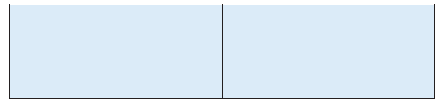
6 R		inches up the wall and is attached and sealed to the wall.							
6 R	(2)	Walls. Dampproof walls are provided below finished grade.	N/A						None
6 R		<b>This practice is not mandatory for existing walls without apparent moisture problem.</b>							
6 R	11.602.1.4.2	11.602.1.4.2 For all new foundations and not less than 25 percent of the total area of the crawlspace after the remodel, crawlspace that is built as a conditioned area is sealed to prevent outside air infiltration and provided with conditioned air at a rate not less than 0.02 cfm (.009 L/s) per square foot of horizontal area and one of the following is implemented:							
6 R	(1)	a concrete slab over 6 mil polyethylene sheeting. Or other Class I vapor retarder installed in accordance with Section 408.3 or Section 506 of the International Residential Code	8	0	0				None
6 R	(2)	6 mil polyethylene sheeting, or other Class I vapor retarder installed in accordance with Section 408.3 or Section 506 of the International Residential Code	N/A						None
6 R		<b>This practice is not mandatory for existing foundations without apparent moisture problem.</b>							
6 R	11.602.1.5	11.602.1.5 Termite barrier. Continuous physical foundation termite barrier provided:						termite infest. prob.:	
6 R		<a href="#">See Figure 6(3)</a>							
6 R	(1)	In geographic areas that have moderate to heavy infestation potential in accordance with figure 6(3), a no or low toxicity treatment is also installed.	4	0	0				None
6 R	(2)	In geographic areas that have a very heavy infestation potential in accordance with figure 6(3), in addition a low toxicity bait and kill termite treatment plan is selected and implemented.	4	0	0				
6 R									
6 RF	11.602.1.6	11.602.1.6 Termite-resistant materials. In areas of termite infestation probability as defined by Figure 6(3), termite-resistant materials are used as follows:							
6 RF		<a href="#">See Figure 6(3)</a>							
6 RF	(1)	In areas of slight to moderate termite infestation probability: for the foundation, all structural walls, floors, concealed roof spaces not accessible for inspection, exterior decks, and exterior claddings within the first 2 feet (610 mm) above the top of the foundation.	2	0	0				None
6 RF	(2)	In areas of moderate to heavy termite infestation probability: for the foundation, all structural walls, floors, concealed roof spaces not accessible for inspection, exterior decks, and exterior claddings within the first 3 feet (914 mm) above the top of the foundation.	4	0	0				
6 RF	(3)	In areas of very heavy termite infestation probability: for the foundation, all structural walls, floors, concealed roof spaces not accessible for inspection, exterior decks, and exterior claddings.	6	0	0				
6 RF									
6 P	11.602.1.7	11.602.1.7 Moisture control measures							
6 P	11.602.1.7.1	11.602.1.7.1 Moisture control measures are in accordance with the following:							
6 P	(1)	Building materials, with visible mold are not installed or are cleaned or encapsulated prior to concealment and closing.	2	2	2				None
6 P	(2)	Insulation in cavities is dry in accordance with manufacturer's instructions when enclosed (e.g., with drywall).	Mandatory 2	2	2			Met	None
6 P		NOTE: If "N/A" is selected, explain why in the assigned Notes area.							
6 R	(3)	The moisture content of lumber is sampled to ensure it does not exceed 19 percent prior to the surface and/or cavity enclosure.	4	0	0				None
6 RF	11.602.1.7.2	11.602.1.7.2 Moisture content of subfloor, substrate, or concrete slabs is in accordance with the appropriate industry standard for the finish flooring to be applied.	2	0	0				None
6 R	11.602.1.7.3	11.602.1.7.3 Building envelope assemblies are designed for moisture control based on documented hygrothermal simulation or field study analysis. Hygrothermal analysis is required to incorporate representative climatic conditions, interior conditions and include heating and cooling seasonal variation.	4	0	0				None
6 P	11.602.1.8	11.602.1.8 Water-resistive barrier. Where required by the ICC, IRC, or IBC, a water-resistive barrier and/or drainage plane system is installed behind newly installed exterior veneer and/or siding and where there is evidence of a moisture problem.	Mandatory					N/A	Not in scope
6 P		NOTE: If "N/A" is selected, explain why in the assigned Notes area.							
6 P	11.602.1.9	11.602.1.9 Flashing. Flashing is provided as follows to minimize water entry into wall and roof assemblies and to direct water to exterior surfaces or exterior water-resistive barriers for drainage. Flashing details are provided in the construction documents and are in accordance with the fenestration manufacturer's instructions, the flashing manufacturer's instructions, or as detailed by a registered design professional.							
6 P		<b>Points awarded only when practices (2)-(7) are implemented in all newly installed construction and not less than 25 percent of the applicable building elements for the entire building after the remodel.</b>							
6 P	(1)	Flashing is installed at all of the following locations, as applicable:						Met	None
6 P	(a)	around exterior fenestrations, skylights, and doors							
6 P	(b)	at roof valleys							
6 P	(c)	at all building-to-deck, -balcony, -porch, and -stair intersections							
6 P	(d)	at roof-to-wall intersections, at roof-to-chimney intersections, at wall-to-chimney intersections, and at parapets							
6 P	(e)	at ends of and under masonry, wood, or metal copings and sills							
6 P	(f)	above projecting wood trim							
6 P	(g)	at built-in roof gutters, and							
6 P	(h)	drip edge is installed at eave and rake edges.							
6 P		<b>These practices are not mandatory for existing building elements without apparent moisture problem.</b>							
6 P	(2)	All window and door head and jamb flashing is either self-adhered flashing complying with AAMA 711-13 or liquid applied flashing complying with AAMA 714-15 and installed in accordance with fenestration or flashing manufacturer's installation instructions.	2	2	2				None
6 R	(3)	Pan flashing is installed at sills of all exterior windows and doors.	3	0	0				None
6 R	(4)	Seamless, preformed kickout flashing, or prefabricated metal with soldered seams is provided at all roof-to-wall intersections. The type and thickness of the material used for roof flashing including but not limited to kickout and step flashing is commensurate with the anticipated service life of the roofing material.	3	0	0				None
6 R	(5)	A rainscreen wall design as follows is used for exterior wall assemblies		0	0				None
6 R	(a)	a system designed with minimum 1/4-inch air space exterior to the water-resistive barrier, vented to the exterior at top and bottom of the wall, and integrated with flashing details. OR	4						
6 R	(b)	a cladding material or a water-resistive barrier with enhanced drainage, meeting 75 percent drainage efficiency determined in accordance with ASTM E2273.	2						
6 R	(6)	Through-wall flashing is installed at transitions between wall cladding materials or wall construction types.	2	0	0				None
6 R	(7)	Flashing is installed at expansion joints in stucco walls.	2	0	0				None
6 RF	11.602.1.10	11.602.1.10 Exterior doors. Entries at exterior door assemblies, inclusive of side lights (if any), are covered by one of the following methods to protect the building from the effects of precipitation and solar radiation. Either a storm door or a projection factor of 0.375 minimum is provided. Eastern- and western-facing entries in Climate Zones 1, 2, and 3, as determined in accordance with Figure 6(1) or Appendix A, have either a storm door or a projection factor of 1.0 minimum, unless protected from direct solar radiation by other means (e.g., screen wall, vegetation).							
6 RF		This Project's Climate Zone: 4							
6 RF	(a)	installing a porch roof or awning	2 per exterior door 6 Max	0	0				
6 RF	(b)	extending the roof overhang							
6 RF	(c)	recessing the exterior door							
6 RF	(d)	installing a storm door							
6 RF		Note: The pedestrian door protected in a garage leading to living space does not qualify for points.							
6 P	11.602.1.11	11.602.1.11 Tile backing materials. Tile backing materials installed under tiled surfaces in wet areas are in accordance with ASTM C1178, C1278, C1288, or C1325.	Mandatory					N/A	No tile
6 P		<b>This practice is not mandatory for existing tile surfaces without apparent moisture problem.</b>							
6 R	11.602.1.12	11.602.1.12 Roof overhangs. Roof overhangs, in accordance with Table 602.1.12, are provided over a minimum of 90 percent of exterior walls to protect the building envelope.	4	0	0				None
6 R		<a href="#">See Table 602.1.12</a>							
6 P	11.602.1.13	11.602.1.13 Ice barrier. In areas where there has been a history of ice forming along the eaves causing a backup of water, an ice barrier is installed in accordance with the ICC IRC or IBC at roof eaves of pitched roofs and extends a minimum of 24 inches (610 mm) inside the exterior wall line of the building.	Mandatory					N/A	None



6	RF	(h)	other biobased materials with a minimum of 50 percent biobased content (by weight or volume)						
6	RF		Note: Please list "other biobased materials" used in the Notes field						
6	RF	(1)	Two types of biobased materials are used, each for more than 0.5 percent of the project's projected building material cost.	3					
6	RF	(2)	Two types of biobased materials are used, each for more than 1 percent of the project's projected building material cost.	6					
6	RF	(3)	For each additional biobased material used for more than 0.5 percent of the project's projected building material cost.	1					
6	RF		<b>2 Max</b>						
6	RF	11.606.2	<b>11.606.2 Wood-based products.</b> Wood or wood-based products are certified to the requirements of one of the following recognized product programs:						
6	RF	(a)	American Forest Foundation's <i>American Tree Farm System</i> ® (ATFS)						
6	RF	(b)	Canadian Standards Association's <i>Sustainable Forest Management System Standards</i> (CSA Z809)						
6	RF	(c)	Forest Stewardship Council (FSC)						
6	RF	(d)	Program for Endorsement of Forest Certification Systems (PEFC)						
6	RF	(e)	Sustainable Forestry Initiative® Program (SFI)						
6	RF	(f)	National Wood Flooring Association's Responsible Procurement Program (RPP)						
6	RF	(g)	other product programs mutually recognized by PEFC						
6	RF	(h)	A manufacturer's fiber procurement system that has been audited by an approve agency as compliant with the provisions of ASTM D7612 as a responsible or certified source. Government or tribal forestlands whose water protection programs have been evaluated by an approved agency as compliant with the responsible source designation of ASTM D7612 are exempt from auditing in the manufacturer's fiber procurement system.						
6	RF	(1)	A minimum of two responsible or certified wood-based products are used for minor components of the building.	3	0	0	Program(s):		None
6	RF		Note: Please list products and components in the Notes fields						None
6	RF	(2)	A minimum of two responsible or certified wood-based products are used in major components of the building.	4	0	0			None
6	RF		Note: Please list products and components in the Notes fields						None
6	RF	11.606.3	<b>11.606.3 Manufacturing energy.</b> Materials manufactured using a minimum of 33 percent of the primary manufacturing process energy derived from (1) renewable sources, (2) combustible waste sources, or (3) renewable energy credits (RECs) are used for major components of the building.	6 Max	0	0			None
6	RF		(2 points awarded per material.)						
6	RF		Note: Please list materials in the Notes field						
6	P	<b>11.607 RECYCLING AND WASTE REDUCTION</b>							
6	F	11.607.1	<b>11.607.1 Recycling and composting.</b> Recycling and composting by the occupant are facilitated by one or more of the following methods:						
6	F	(1)	A readily accessible space(s) for recyclable material containers is provided and identified on the floorplan of the house or dwelling unit or a readily accessible area(s) outside the living space is provided for recyclable material containers and identified on the site plan for the house or building. The area outside the living space shall accommodate recycling bin(s) for recyclable materials accepted in local recycling programs	3	0	0			None
6	F	(2)	A readily accessible space(s) for compostable material containers is provided and identified on the floorplan of the house or dwelling unit or a readily accessible area(s) outside the living space is provided for compostable material containers and identified on the site plan for the house or building. The area outside the living space shall accommodate composting container(s) for locally accepted materials, or, accommodate composting container(s) for on-site composting.	4	0	0			None
6	P	11.607.2	<b>11.607.2 Food waste disposers.</b> A minimum of one food waste disposer is installed at the primary kitchen sink.	1	1	1			None
6	P	<b>11.608 RESOURCE-EFFICIENT MATERIALS</b>							
6	RF	11.608.1	<b>11.608.1 Resource-efficient materials.</b> Products containing fewer materials are used to achieve the same end-use requirements as conventional products, including but not limited to:	9 Max	0	0			None
6	RF		3 per material						
6	RF	(1)	lighter, thinner brick with bed depth less than 3 inches and/or brick with coring of more than 25 percent						
6	RF	(2)	engineered wood or engineered steel products						
6	RF	(3)	roof or floor trusses						
6	RF		NOTE: In the assigned Notes area, describe the types of products that comply with 11.608.1.						
6	P	<b>11.609 REGIONAL MATERIALS</b>							
6	RF	11.609.1	<b>11.609.1 Regional materials.</b> Regional materials are used for major and/or minor components of the building.	10 Max					
6	RF	(1)	Major component	2 per each component	0	0	# of major components:		None
6	RF	(2)	Minor component	1 per each component			# of minor components:		None
6	RF		For a component to comply with this practice, a minimum of 75 percent of all products in that component category must be sourced regionally, e.g., stone veneer category – 75 percent or more of the stone veneer on a project must be sourced regionally.						
6	RF		NOTE: In the assigned Notes areas, list major and minor materials used that comply with 11.609.1.						
6	P	<b>11.610 LIFE CYCLE ASSESSMENT</b>							
6	RF	11.610.1	<b>11.610.1 Life cycle assessment.</b> A life cycle assessment (LCA) tool is used to select environmentally preferable products, assemblies, or, entire building designs. Points are awarded in accordance with Section 11.610.1.1 or 11.610.1.2. Only one method of analysis or tool may be utilized. The reference service life for the building is 60 years for any life cycle analysis tool. Results of the LCA are reported in the manual required in Section 11.1001.1 or 11.1002.1(1) of this Standard in terms of the environmental impacts listed in this practice and it is stated if onerative enervex was included in the LCA. NOTE: Identify the LCA tool utilized and the person who completed the analysis.						None
6	R	11.610.1.1	<b>11.610.1.1 Whole-building life cycle assessment.</b> A whole-building LCA is performed in conformance with ASTM E2921 using ISO14044 compliant life cycle assessment.						
6	R	(1)	Execute LCA at the whole building level through a comparative analysis between the final and reference building designs as set forth under Standard Practice, ASTM E2921. The assessment criteria includes the following environmental impact categories:						None
6	R	(a)	Primary energy use						
6	R	(b)	Global warming potential	8	0	0			
6	R	(c)	Acidification potential						
6	R	(d)	Eutrophication potential						
6	R	(e)	Ozone depletion potential						
6	R	(f)	Smog potential						
6	R	(2)	Execute LCA on regulated loads throughout the building operations life cycle stage. Conduct simulated energy performance analyses in accordance with Section 702.2.1 ICC IECC analysis (IECC Section 405) in establishing the comparative performance of final versus reference building designs. Primary energy use savings and global warming potential avoidance from simulation analyses results are determined using energy supplier, utility, or EPA electricity generation and other fuels energy conversion factors and electricity generation and other fuels emission rates for the locality or Sub-Region in which the building is located	5	0	0			None
6	R	(3)	Execute full LCA, including use-phase, through calculation of operating energy impacts (c) – (f) using local or regional emissions factors from energy supplier, utility, or EPA.	2	0	0			None
6	R	11.610.1.2	<b>11.610.1.2 Life cycle assessment for a product or assembly.</b> An environmentally preferable product or assembly is selected for an application based upon the use of an LCA tool that incorporates data methods compliant with ISO 14044 or other recognized standards that compare the environmental impact of products or assemblies.	10 Max	0	0			
6	R	11.610.1.2.1	<b>11.610.1.2.1 Product LCA.</b> A product with improved environmental impact measures compared to another product(s) intended for the same use is selected. The environmental impact measures used in the assessment are selected from the following:				# of comparisons with 4 measures:		None
6	R	(a)	Primary energy use						
6	R	(b)	Global warming potential						
6	R	(c)	Acidification potential						
6	R	(d)	Eutrophication potential						
6	R	(e)	Ozone depletion potential						
6	R		per Table 11.610.1.2.1 10 Max				# of comparisons with		None

6	R	(f) Smog potential				5 measures:		
6	R	(Points are awarded for each product/system comparison where the selected product/system improved upon the environmental impact measures by an average of 15 percent.)						
6	R	NOTE: List products/systems compared & impact measures considered in the assigned Notes area.						
6	R	11.610.1.2.2 11.610.1.2.2 Assembly LCA. An assembly with improved environmental impact measures compared to a functionally comparable assembly is selected. The full life cycle, from resource extraction to demolition and disposal (including but not limited to on-site construction, maintenance and replacement, material and product embodied acquisition, and process and transportation energy), is assessed. The assessment does not include electrical and mechanical equipment and controls, plumbing products, fire detection and alarm systems, elevators, and conveying systems. The following functional building elements are eligible for points under this practice:				exterior walls:		None
6	R	(a) exterior walls						
6	R	(b) roof/ceiling				roof/ceiling:		None
6	R	(c) interior walls or ceilings						
6	R	(d) intermediate floors				int. walls or ceilings:		None
6	R	The environmental impact measures used in the assessment are selected from the following:						
6	R	(a) Primary energy use				intermediate floors:		None
6	R	(b) Global warming potential						
6	R	(c) Acidification potential						
6	R	(d) Eutrophication potential						
6	R	(e) Ozone depletion potential						
6	R	(f) Smog potential						
6	R	(Points are awarded based on the number of functional building elements that improve upon environmental impact measures by an average of 15 percent.)						
6	R	NOTE: List assemblies compared & impact measures considered in the assigned Notes area.						
6	RF	<b>11.611 PRODUCT DECLARATIONS</b>						
6	F	11.611.1 11.611.1 Product declarations. A minimum of 10 different products installed in the building project, at the time of certificate of occupancy, comply with one of the following sub-sections. Declarations, reports, and assessments are submitted and contain documentation of the critical peer review by an independent third party, results from the review, the reviewer's name, company name, contact information, and date of the review.	5	0	0			
6	F	11.611.1.1 11.611.1.1 Industry-wide declaration. A Type III industry-wide environmental product declaration (EPD) is submitted for each product. Where the program operator explicitly recognizes the EPD as representative of the product group on a National level, it is considered industry-wide. In the case where an industry-wide EPD represents only a subset of an industry group, as opposed to being industry-wide, the manufacturer is required to be explicitly recognized as a participant by the EPD program operator. All EPDs are required to be consistent with ISO Standards 14025 and 21930 with at least a cradle-to-gate scope. [Each product complying with Section 611.4.1 shall be counted as one product for compliance with Section 611.4.]				# of products:		None
6	F	NOTE: List products in the assigned Notes area.						
6	F	11.611.1.2 11.611.1.2 Product Specific Declaration. A product specific Type III EPD are submitted for each product. The product specific declaration shall be manufacturer specific for an individual product or product family. All Type III EPDs are required to be certified as complying, at a minimum, with the goal and scope for the cradle-to-gate requirements in accordance with ISO Standards 14025 and 21930. [Each product complying with Section 611.4.2 shall be counted as two products for compliance with Section 611.4.]				# of products (not effective number):		None
6	F	NOTE: List products in the assigned Notes area.						
6	RF	<b>11.612 INNOVATIVE PRACTICES</b>						
6	RF	11.612.1 11.612.1 Manufacturer's environmental management system concepts. Product manufacturer's operations and business practices include environmental management system concepts, and the production facility is registered to ISO 14001 or equivalent. The aggregate value of building products from registered ISO 14001 or equivalent production facilities is 1 percent or more of the estimated total building materials cost.	10 Max	0	0			None
6	RF	(1 point awarded per percent.)						
6	RF	NOTE: In the assigned Notes area, list products that comply with 610.1, manufacturers, and ISO registrars.						
6	RF	11.612.2 11.612.2 Sustainable products. One or more of the following products are used for at least 30% of the floor or wall area of the entire dwelling unit or sleeping unit, as applicable. Products are certified by a third-party agency accredited to ISO 17065.	9 Max	0	0			
6	RF	(1) 50% or more of carpet installed (by square feet) is certified to NSF 140 or equivalent.	3			<input type="checkbox"/>		None
6	RF	(2) 50% or more of resilient flooring installed (by square feet) is certified to NSF 332 or equivalent.	3			<input type="checkbox"/>		None
6	RF	(3) 50% or more of the insulation installed (by square feet) is certified to UL 2985 or equivalent.	3			<input type="checkbox"/>		None
6	RF	(4) 50% or more of interior wall coverings installed (by square feet) is certified to NSF 342 or equivalent.	3			<input type="checkbox"/>		None
6	RF	(5) 50% or more of the gypsum board installed (by square feet) is certified to UL 100 or equivalent.	3			<input type="checkbox"/>		None
6	RF	(6) 50% or more of the door leafs installed (by number of door leafs) is certified to UL 102 or equivalent.	3			<input type="checkbox"/>		None
6	RF	(7) 50% or more of the tile installed (by square feet) is certified to TCNA A138.1 Specifications for Sustainable Ceramic Tiles, Glass Tiles and Tile Installation Materials or equivalent.	3			<input type="checkbox"/>		None
6	RF	11.612.3 11.612.3 Universal design elements. Dwelling incorporates one or more of the following universal design elements. Conventional industry construction tolerances are permitted.	12 Max	0	0			
6	RF	(1) Any no-step entrance into the dwelling which (1) is accessible from a substantially level parking or drop-off area (no more than 2%) via an accessible path which has no individual change in elevation or other obstruction of more than 1-1/2 inches in height with the pitch not exceeding 1 in 12 and (2) provides a minimum 32-inch wide clearance into the dwelling.	3			<input type="checkbox"/>		None
6	RF	(2) Minimum 36-inch wide accessible route from the no-step entrance into at least one visiting room in the dwelling and into at least one full or half bathroom which has a minimum 32-inch clear door width and a 30-inch by 48-inch clear area inside the bathroom outside the door swing.	3			<input type="checkbox"/>		None
6	RF	(3) Minimum 36-inch wide accessible route from the no-step entrance into at least one bedroom which has a minimum 32-inch clear door width.	3			<input type="checkbox"/>		None
6	R	(4) Blocking or equivalent installed in the accessible bathroom walls for future installation of grab bars at water closet and bathing fixture, if applicable.	1			<input type="checkbox"/>		None
6	RF	(5) All interior and exterior door handles are levers rather than knobs.	1			<input type="checkbox"/>		None
6	RF	(6) All sink faucet controls are single-handle controls of both volume and temperature.	1			<input type="checkbox"/>		None
6	RF	(7) Interior convenience Power receptacles, communication connections (for cable, phone, Ethernet, etc.) and switches are placed between 15" and 48" above the finished floor. Additional switches to control devices and systems (such as alarms, home theaters and other equipment) not required by the local building code may be installed as desired.	1			<input type="checkbox"/>		None
6	RF	(8) All light switches are rocker-type switches or other similar switches that can be operated by pressing them (with assistive devices). Toggle-type switches may not be used.	1			<input type="checkbox"/>		None
6	RF	(9) Anyone of the following systems are automated and can be controlled with a wireless device or voice-activated device: HVAC, all permanently-installed lighting, alarm system, window treatments, or door locks.	1 per system [5 max]			<input type="checkbox"/>		None
6	RF	<b>11.613 RESILIENT CONSTRUCTION</b>						
6	RF	11.613.1 11.613.1 Intent. Design and construction practices developed by a licensed design professional or equivalent are implemented that enhance the resilience and durability of the structure (above building code minimum design loads) so the structure can better withstand forces generated by; flooding, snow, wind or seismic activity (as applicable) and reduce the potential for the loss of life and property.		0	0			None
6	RF	(a) Minimum structural requirements (base design). The building is designed and constructed in compliance with structural requirements in the IBC or IRC as applicable.	2					
6	RF	(b) Enhanced resilience - 10% above base design. Design and construction practices are implemented that enhance the resilience and durability of the structure by designing and	3					

6	RF	building to forces generated by; flooding, snow, wind or seismic (as applicable) that are 10% higher than the base design.	5
6	RF	(c) Enhanced resilience – 20% above base design.	5
6	RF	(d) Enhanced resilience – 30% above base design.	10
6	RF	(e) Enhanced resilience – 40% above base design.	12
6	RF	(f) Enhanced resilience – 50% above base design.	15



11.701 MINIMUM ENERGY EFFICIENCY REQUIREMENTS						
7 P	RF	11.701.2.5	305.2.5 Energy efficiency. The building shall comply with Section 305.2.5.1 or 305.2.5.2.	Mandatory	Prescriptive Path	None
7 R			Please indicate energy modeler's professional credential and, in the notes field, their name.	N/A	Modeler's Credential:	None
7 R			When selecting "Other," enter professional credentials (e.g., engineer, architect) within the notes field.			
7 P	RF	11.701.4	11.701.4 Mandatory practices.			
7 P	F	11.701.4.0	11.701.4.0 Minimum energy efficiency requirements. Additions, alterations, or renovations to an existing building, building system or portion thereof shall comply with the provisions of the ICC IECC as they relate to new construction without requiring the unaltered portion(s) of the existing building or building system to comply with the ICC IECC. An addition complies with the IECC if the addition complies or if the existing building and addition comply with the ICC IECC as a single building.	Mandatory	<input checked="" type="checkbox"/>	None
7 P	R	11.701.4.1	11.701.4.1 HVAC systems.			
7 P	R	11.701.4.1.1	11.701.4.1.1 HVAC system sizing. Newly installed or modified space heating and cooling system is sized according to heating and cooling loads calculated using ACCA Manual J, or equivalent. New equipment is selected using ACCA Manual S or equivalent.	Mandatory	<input checked="" type="checkbox"/>	None
7 P	R	11.701.4.1.2	11.701.4.1.2 Radiant and hydronic space heating. Where installed as a primary heat source in the building, new radiant or hydronic space heating system is designed, installed, and documented, using industry-approved guidelines and standards (e.g., ACCA Manual J, AHRI In=8R, ANSI/ACCA 5 Qi-2010, or an accredited design professional's and manufacturer's recommendations).	Mandatory	No Radiant or Hydronic	None
7 P	R	11.701.4.2	11.701.4.2 Duct systems.			
7 P	R	11.701.4.2.1	11.701.4.2.1 Duct air sealing. Newly installed, modified, or ducts that are exposed during the remodel are air sealed. All duct sealing materials are in conformance with UL 181A or UL 181B specifications and are installed in accordance with manufacturer's instructions.	Mandatory	<input checked="" type="checkbox"/>	None
7 P	R	11.701.4.2.2	11.701.4.2.2 Ducts and Plenums. Building framing cavities are not used as ducts or plenums. Existing building cavities currently used as supply ducts exposed during the remodel are lined.	Mandatory	<input checked="" type="checkbox"/>	None
7 P	R	11.701.4.2.3	11.701.4.2.3 Duct system sizing. New or modified Duct system is sized and designed in accordance with ACCA Manual D or equivalent.	Mandatory	<input checked="" type="checkbox"/>	None
7 P	R	11.701.4.3	11.701.4.3 Insulation and air sealing.			
7 P	R	11.701.4.3.1	11.701.4.3.1 Building Thermal Envelope Air Sealing. The building thermal envelope exposed or created during the remodel is durably sealed to limit infiltration. The sealing methods between dissimilar materials allow for differential expansion and contraction. The following are caulked, gasketed, weather-stripped or otherwise sealed with an air barrier material, suitable film, or solid material:	Mandatory	701.4.3.3 Exception: <input checked="" type="checkbox"/>	None
7 P	R		(a) All joints, seams and penetrations.		Met	None
7 P	R		(b) Site-built windows, doors, and skylights.		N/A	None
7 P	R		(c) Openings between window and door assemblies and their respective jambs and framing.		Met	None
7 P	R		(d) Utility penetrations.		Met	None
7 P	R		(e) Dropped ceilings or chases adjacent to the thermal envelope.		N/A	None
7 P	R		(f) Knee walls.		N/A	None
7 P	R		(g) Walls, ceilings, and floors separating conditioned spaces from unconditioned space.		Met	None
7 P	R		(h) Behind tubs and showers on exterior walls.		Met	None
7 P	R		(i) Common walls between dwelling units or sleeping units.		Met	None
7 P	R		(j) Attic access openings.		Met	None
7 P	R		(k) Joints of framing members at rim joists.		N/A	None
7 P	R		(l) Top and bottom plates.		N/A	None
7 P	R		(m) Other sources of infiltration.		Met	None
7 P	RF	11.701.4.3.2	11.701.4.3.2 Air barrier, air sealing, building envelope testing and insulation. For portions of the building envelope that are exposed or created during the remodel, building envelope air tightness and insulation installation is verified to be in accordance with this Section and Section 11.701.4.3.2.1. Insulation installation other than Grade 1 is not permitted.	Mandatory	No affected areas: <input checked="" type="checkbox"/>	None
7 P	RF	(1)	Testing. Building envelope tightness is tested. Testing is conducted in accordance with ASTM E-779 using a blower door at a test pressure of 1.04 psf (50 Pa). Testing is conducted after rough-in and after installation of penetrations of the building envelope, including penetrations for utilities, plumbing, electrical, ventilation, and combustion appliances. Testing is conducted under the following conditions:  Testing is required, unless multifamily building is classified as commercial by IECC and building is in compliance with IECC C402.5 (Air Leakage and Thermal Envelope. Commercial buildings have option to comply via testing or per C402.5.		ACH50: 10.00	None
7 P	RF		(a) Exterior windows and doors, fireplace and stove doors are closed, but not sealed;		ELR:	None
7 P	RF		(b) Dampers are closed, but not sealed, including exhaust, intake, makeup air, backdraft and flue dampers;			
7 P	RF		(c) Interior doors are open;			
7 P	RF		(d) Exterior openings for continuous ventilation systems and heat recovery ventilators are closed and sealed;			
7 P	RF		(e) Heating and cooling systems are turned off;			
7 P	RF		(f) HVAC duct terminations are not sealed; and			
7 P	RF		(g) Supply and return registers are not sealed.			
7 P	RF		Multifamily Building Note: Testing by dwelling units, sleeping units, groups of dwelling units, groups of sleeping units, or the building as a whole is acceptable.			
7 P	R	(2)	Visual inspection. The air barrier and insulation items listed in Table 11.701.4.3.2(2) are field verified by visual inspection.  See Table 11.701.4.3.2(2)		<input checked="" type="checkbox"/>	None
7 P	R	11.701.4.3.2.1	11.701.4.3.2.1 Grade I insulation installation. Field-installed insulation products to ceilings, walls, floors, band joists, rim joists, conditioned attics, basements, and crawlspaces, except as specifically noted, are verified as Grade I by a third-party in accordance with the following:	Mandatory	<input checked="" type="checkbox"/>	None
7 P	R	(1)	Inspection is conducted before insulation is covered.			None
7 P	R	(2)	Air-permeable insulation is enclosed on all six sides and is in substantial contact with the sheathing material on one or more sides (interior or exterior) of the cavity. Air permeable insulation in ceilings is not required to be enclosed when the insulation is installed in substantial contact with the surfaces it is intended to insulate.			None
7 P	R	(3)	Cavity insulation uniformly fills each cavity side-to-side and top-to-bottom, without substantial gaps or voids around obstructions (such as blocking or bridging).			None
7 P	R	(4)	Cavity insulation compression or incomplete fill amounts to 2 percent or less, presuming the compressed or incomplete areas are a minimum of 70 percent of the intended fill thickness; occasional small gaps are acceptable.			None
7 P	R	(5)	Exterior rigid insulation has substantial contact with the structural framing members or sheathing materials and is tightly fitted at joints.			None
7 P	R	(6)	Cavity insulation is split, installed, and/or fitted tightly around wiring and other services.			None
7 P	R	(7)	Exterior sheathing is not visible from the interior through gaps in the cavity insulation.			None
7 P	R	(8)	Faced batt insulation is permitted to have side-stapled tabs, provided the tabs are stapled neatly with no buckling, and provided the batt is compressed only at the edges of each cavity, to the depth of the tab itself.			None
7 P	R	(9)	Where properly installed, ICFs, SIPs, and other wall systems that provide integral insulation are deemed in compliance with this section.			None
7 P	R	11.701.4.3.3	11.701.4.3.3 Multifamily air leakage alternative. Multifamily buildings four or more stories in height and in compliance with IECC section C402.5 (Air leakage-thermal envelope) are deemed to comply with Sections 11.701.4.3.1 and 11.701.4.3.2.		See 11.703.4.3.1	None
7 P	R	11.701.4.3.4	11.701.4.3.4 Fenestration air leakage. Newly installed Windows, skylights and sliding glass doors have an air infiltration rate of no more than 0.3 cfm per square foot (1.5 L/s/m <sup>2</sup> ), and swinging doors no more than 0.5 cfm per square foot (2.6 L/s/m <sup>2</sup> ), when tested in accordance with NFRC 400 or AAMA/WDMA/CSA 1011.5.2/A440 by an accredited, independent laboratory and listed and labeled. For site-built fenestration, a test report by an accredited, independent laboratory verifying compliance with the applicable infiltration rate shall be submitted to demonstrate compliance with this practice. This practice does not apply to field-fabricated fenestration products.  Exception: For Tropical Zones only, jalousie windows are permitted to be used as a conditioned space boundary and shall have an air infiltration rate of not more than 1.3 cfm per square foot.	Mandatory	Met	None
7 P	R	11.701.4.3.5	11.701.4.3.5 Lighting and building thermal envelope. Newly installed luminaires installed in the building thermal envelope which penetrate the air barrier are sealed to limit air leakage between conditioned and unconditioned spaces. All luminaires are IC-rated and labeled as meeting ASTM E283 when tested at 1.57 psf (75 Pa) pressure differential with no more than 2.0 cfm (0.944 L/s) of air penetration from the conditioned space to the unconditioned space. All luminaires installed in the	Mandatory	N/A	None



7	RF										
7	P	11.703.3	11.703.3 HVAC equipment efficiency								
7	P	RF	11.703.3.0 Multiple heating and cooling systems. For multiple heating or cooling systems in one home, practices 11.703.3.1 through 11.703.3.6 apply to the system that supplies 80% or more of the total installed heating or cooling capacity. Where multiple systems each serve less than 80% of the total installed heating or cooling capacity, points under Sections 11.703.3.1 through 11.703.3.6 are awarded either for the system eligible for the fewest points or the weighted average of the systems. The weighted average shall be calculated in accordance with the following equation and be based upon the efficiency and capacity of the equipment as selected in accordance with ACCA Manual 5 with its loads calculated in accordance with ACCA Manual J.				multiple heating sys.?			None	
7	P	RF	Weighted Average = $\frac{[(E_{unit1} * C_{unit1}) + (E_{unit2} * C_{unit2}) + \dots + (E_{unitn} * C_{unitn})]}{(C_{unit1} + C_{unit2} + \dots + C_{unitn})}$				multiple cooling sys.?			None	
7	P	RF	where: E = Rated AHRI efficiency for unit C = Rated heating or cooling capacity for unit n = Unit count								
7	P	RF	11.703.3.1 11.703.3.1 Combination space heating and water heating system (combo system) is installed using either a coil from the water heater connected to an air handler to provide heat for the building, dwelling unit or sleeping unit, or a space heating boiler using an indirect-fired water heater. Devices have a minimum combined annual efficiency of 0.80 and a minimum water heating recovery efficiency of 0.87.	4	0	0				None	
7	P	RF	11.703.3.2 11.703.3.2 Furnace and/or boiler efficiency is in accordance with one of the following:								
7	P	RF	(1) Gas and propane heaters:		0	0	Min. or Average AFUE:			None	
7	P	RF	≥90% AFUE	6							
7	P	RF	≥92% AFUE	7							
7	P	RF	≥94% AFUE	9							
7	P	RF	≥96% AFUE	10							
7	P	RF	≥98% AFUE	11							
7	P	RF	(2) Oil furnace:		0	0	Min. or Average AFUE:			None	
7	P	RF	≥85% AFUE	3							
7	P	RF	≥90% AFUE	6							
7	P	RF	(3) Gas boiler:		0	0	Min. or Average AFUE:			None	
7	P	RF	≥85% AFUE	2							
7	P	RF	≥90% AFUE	4							
7	P	RF	≥94% AFUE	5							
7	P	RF	≥96% AFUE	6							
7	P	RF	(4) Oil boiler:		0	0	Min. or Average AFUE:			None	
7	P	RF	≥85% AFUE	3							
7	P	RF	≥90% AFUE	5							
7	P	RF	11.703.3.3 11.703.3.3 Heat pump heating efficiency is in accordance with Table 11.703.3.3(1) or Table 11.703.3.3(2) or Table 11.703.3.3(3). Refrigerant charge is verified for compliance with manufacturer's instructions utilizing a method in Section 4.3 of ACCA 5 Qi-2010.								
7	P	RF	(1) Electric Heat Pump Heating		2	2	Min. or Average HSPF:			None	
7	P	RF	≥8.5 HSPF	2			8.5				
7	P	RF	≥9.0 HSPF	5							
7	P	RF	≥9.5 HSPF	7							
7	P	RF	≥10.0 HSPF	10							
7	P	RF	≥12.0 HSPF	11			Min. or Average HSPF:				
7	P	RF	(2) Electric Heat Pump Heating for Multifamily Buildings Four or More Stories in Height	8	0	0	Min. or Average COP:			None	
7	P	RF	(3) Gas Engine-Driven Heat Pump Heating (≥1.3 COP at 47°F)	14	0	0				None	
7	P	RF	11.703.3.4 11.703.3.4 Cooling efficiency is in accordance with Table 11.703.3.4(1) or Table 11.703.3.4(2). Refrigerant charge is verified for compliance with manufacturer's instructions utilizing a method in Section 4.3 of ACCA 5 Qi-2010.								
7	P	RF	(1) Electric Air Conditioner and Heat Pump Cooling		1	1	Min. or Average SEER:			None	
7	P	RF	≥15 SEER	1			16.0				
7	P	RF	≥17 SEER	3							
7	P	RF	≥19 SEER	6							
7	P	RF	≥21 SEER	8							
7	P	RF	≥25 SEER	10							
7	P	RF	(*) Tropical Climate Zone: None of the occupied space is air conditioned and ceiling fans are provided for bedrooms and the largest space which is not used as a bedroom.	20	0	0	Min. or Average COP:			None	
7	P	RF	(2) Gas Engine-Driven Heat Pump Cooling (≥1.2 COP at 95°F)	1	0	0				None	
7	P	RF	11.703.3.5 11.703.3.5 Water source cooling and heating efficiency is in accordance with Table 11.703.3.5. Refrigerant charge is verified for compliance with manufacturer's instructions utilizing a method in Section 4.3 of ACCA 5 Qi-2010.	30	0	0				None	
7	P	RF	11.703.3.6 11.703.3.6 Ground source heat pump is installed by a Certified Geothermal Service Contractor in accordance with Table 11.703.2.5. Refrigerant charge is verified for compliance with manufacturer's instructions utilizing a method in Section 4.3 of ACCA 5 Qi-2010.		0	0	Min. or Average EER:			None	
7	P	RF	≥16 EER	16							
7	P	RF	≥24 EER	31							
7	P	RF	≥28 EER	42							
7	P	F	11.703.3.7 11.703.3.7 ENERGY STAR, or equivalent, ceiling fans are installed. [Points awarded per building.] [For Tropical Climate Zone and Climate Zones 2B, 3B, and 4B; points awarded per fan where AC is not installed in the dwelling unit or sleeping unit (Max 8 points), and where points awarded in Section 11.703.3.8 for these specific climate zones, points shall not be awarded in Section 11.703.3.7]	1	0	0	# of fans:			None	
7	P	F	NOTE: For multi-unit buildings, each dwelling unit must comply to claim this point.								
7	P	RF	11.703.3.8 11.703.3.8 Whole-building or whole-dwelling unit or whole-sleeping unit fan(s) with insulated louvers and a sealed enclosure is installed. [Points awarded per building.]	3	0	0				None	
7	P	RF	NOTE: For multi-unit buildings, each dwelling unit must have compliant whole-dwelling unit fans installed to claim these points.								
7	P	RF	11.703.4 11.703.4 Duct systems								
7	P	RF	11.703.4.1 11.703.4.1 All space heating is provided by a system(s) that does not include air ducts.	6	0	0				None	
7	P	RF	11.703.4.2 11.703.4.2 All space cooling is provided by a system(s) that does not include air ducts.	2	0	0				None	
7	P	R	11.703.4.3 11.703.4.3 Ductwork is in accordance with all of the following:	8	8	8					
7	P	R	(1) Building cavities are not used as return ductwork.							None	
7	P	R	(2) Heating and cooling ducts and mechanical equipment are installed within the conditioned building space.							None	
7	P	R	(3) Ductwork is not installed in exterior walls.							None	
7	P	RF	11.703.4.4 11.703.4.4 Duct Leakage. The entire central HVAC duct system, including air handlers and register boots, is tested by a third party for total leakage at a pressure differential of 0.1 inches w.g. (25 Pa) and maximum air leakage is equal to or less than 6 percent of the system design flow rate or 4 cubic feet per minute per 100 square feet of conditioned floor area. [Points not awarded if points are taken under Section 11.705.6.2.3]		0	0	Sys. Design Flow Rate:			None	
7	P	RF	[Points not awarded if points are taken under Section 11.705.6.2.3]				Building Leakage:				
7	P	RF	(1) ductwork entirely outside the building's thermal envelope	3							
7	P	RF	(2) ductwork entirely inside the building's thermal envelope	1							
7	P	RF	(3) ductwork inside and outside the building's thermal envelope	2							
7	P	RF	11.703.5 11.703.5 Water heating system								
7	P	RF	11.703.5.1 11.703.5.1 Water heater Uniform Energy Factor (UEF) is in accordance with the following: [Where multiple systems are used, points awarded based on the system with the lowest efficiency.] [Water heater design is based on only 1 (one) water heater per dwelling unit, based on approved methods from IPC or ASPE or manufacturer specifications.] [All table values are based on water heaters with medium water draws as defined by the US DOE text procedures (55 gallons per day).]				type:			None	
7	P	RF	(1) Gas water heating				efficiency:				
7	P	RF	(a) Storage Water Heater, Rated Storage Volume > 20 Gallons and ≤ 55 Gallons, Medium Water Draw		0	0					
7	P	RF	UEF: 0.65 to <0.78	2							
7	P	RF	UEF: ≥0.78	3							
7	P	RF	(b) Storage Water Heater, Rated Storage Volume > 55 Gallons and ≤ 100 Gallons, Medium Water Draw	1	0	0					

7	RF	(c)	Storage Water Heater with Input Rate Greater than 75,000 Btu/h (Commercial)	0	0			
7	RF		Thermal Efficiency: 0.90 to < 0.95	3				
7	RF		Thermal Efficiency: ≥0.95	4				
7	RF	(d)	Storage Water Heater with Input Rate Greater than 75,000 Btu/h (Commercial), In Buildings with High-Capacity Service Water-Heating Systems (1,000,000 Btu/h or Greater)	0	0			
7	RF		Thermal Efficiency: 0.92 to < 0.95	1				
7	RF		Thermal Efficiency: ≥0.95	2				
7	RF	(e)	Instantaneous Water Heater, Rated Storage Volume < 2 Gallons and Input Rate of > 50,000 Btu/h, Medium Water Draw	0	0			
7	RF		UEF: 0.89 to < 0.94	1				
7	RF		UEF: ≥0.94	2				
7	RF	(2)	Electric water heating					
7	RF	(a)	Storage Water Heater, Rated Storage Volume ≥ 20 Gallons and ≤ 55 Gallons, Medium Water Draw	0	0			
7	RF		UEF: 0.94 to <1.0	1				
7	RF		UEF: 1.0 to <1.5	2				
7	RF		UEF: 1.5 to <2.0	2				
7	RF		UEF: 2.0 to <2.2	5				
7	RF		UEF: 2.2 to <2.5	6				
7	RF		UEF: 2.5 to <3.0	8				
7	RF		UEF: ≥3.0	11				
7	RF	(b)	Storage Water Heater, Rated Storage Volume ≥ 55 Gallons and ≤ 120 Gallons, Medium Water Draw	0	0			
7	RF		UEF: 2.2 to <2.5	3				
7	RF		UEF: 2.5 to <3.0	3				
7	RF		UEF: 3.0 to <3.5	4				
7	RF		UEF: ≥3.5	5				
7	RF	(c)	Electric Tabletop Water Heating (Tabletop Water Heater, Rated Storage Volume ≥ 20 Gallons and ≤ 120 Gallons, Medium Water Draw)	1	0	0		
7	RF	(d)	Electric Instantaneous Water Heating (Instantaneous Electric Water Heater, Rated Storage Volume < 2 Gallons, Medium Water Draw)	2	0	0		
7	RF	(e)	Electric Grid Enabled Water Heating (Grid Enabled Storage Water Heater, Rated Storage Volume ≥ 75 Gallons, Medium Water Draw)	1	0	0		
7	RF	(9)	Oil water heating	1	0	0		
7	RF	11.703.5.2	11.703.5.2 Desuperheater is installed by a qualified installer or is pre-installed in the factory.	23	0	0	<input type="checkbox"/>	None
7	RF	11.703.5.3	11.703.5.3 Drain-water heat recovery system is installed. [Points awarded per building.]	2	0	0	<input type="checkbox"/>	None
7	RF	11.703.5.4	11.703.5.4 Indirect-fired water heater storage tanks heated from boiler systems are installed.	1	0	0	<input type="checkbox"/>	None
7	RF	11.703.5.5	11.703.5.5 Solar water heater. SRCC (Solar Rating & Certification Corporation) OG 300 rated, or equivalent, solar domestic water heating system is installed. Solar Energy Factor (SEF) as defined by SRCC is in accordance with Table 11.703.5.5(a) and Table 11.703.5.5(b).				SEF:	None
7	RF	(a)	Storage Water Heater, Rated Storage Volume of Backup Water Heater is ≥ 0.1 Gallon and ≤ 55 Gallons, Medium Water Draw	0	0			
7	RF		SEF ≥ 1.3	5				
7	RF		SEF ≥ 1.51	6				
7	RF		SEF ≥ 1.81	9				
7	RF		SEF ≥ 2.31	14				
7	RF		SEF ≥ 3.01	21				
7	RF	(b)	Storage Water Heater, Rated Storage Volume of Backup Water Heater is >55 Gallons, Medium Water Draw	0	0			
7	RF		SEF ≥ 1.3	3				
7	RF		SEF ≥ 1.51	4				
7	RF		SEF ≥ 1.81	6				
7	RF		SEF ≥ 2.31	10				
7	RF		SEF ≥ 3.01	14				
7	F	11.703.6	11.703.6 Lighting and appliances					
7	F	11.703.6.1	11.703.6.1 Hard-wired lighting. Hard-wired lighting is in accordance with one of the following:					
7	F	(1)	A minimum percent (95%) of the total hard-wired interior luminaires or lamps qualify as ENERGY STAR, DesignLights Consortium (DLC), or applicable equivalent.	2	2	2	<input type="checkbox"/>	None
7	F	(2)	A minimum of 80 percent of the exterior lighting wattage has a minimum efficacy of 61 lumens per watt or is solar-powered.	1	0	0	<input type="checkbox"/>	None
7	F	(3)	In multifamily buildings, common area lighting power density (LPD) is less than 0.51 Watts per square foot.	7	0	0	<input type="checkbox"/>	None
7	F	11.703.6.2	11.703.6.2 Appliances. ENERGY STAR or equivalent appliance(s) are installed:					
7	F	(1)	Refrigerator	1	1	1	<input type="checkbox"/>	None
7	F	(2)	Dishwasher	1	0	0	<input type="checkbox"/>	None
7	F	(3)	Washing machine	4	4	4	<input type="checkbox"/>	None
7	F		Multifamily Building Note: Washing machines in ALL units must comply.					
7	RF	11.703.7	11.703.7 Passive solar design					
7	RF	11.703.7.1	11.703.7.1 Sun-tempered design. Building orientation, sizing of glazing, and design of overhangs are in accordance with all of the following:	4	0	0	<input type="checkbox"/>	
7	RF	(1)	The long side (or one side if of equal length) of the building faces within 20 degrees of true south.					None
7	RF	(2)	Vertical glazing area is between 5 and 7 percent of the gross conditioned floor area on the south face [also see Section 11.703.7.1(8)] and glazing U-factors meet Table 11.703.2.5.2(a).					None
7	RF	(3)	Vertical glazing area is less than 2 percent of the gross conditioned floor area on the west face, and glazing meets Table 11.703.2.5.2(a).					None
7	RF	(4)	Vertical glazing area is less than 4 percent of the gross conditioned floor area on the east face, and glazing meets Table 11.703.2.5.2(a).					None
7	RF	(5)	Vertical glazing area is less than 8 percent of the gross conditioned floor area on the north face, and glazing meets Table 11.703.2.5.2(a).					None
7	RF	(6)	Skylights, where installed, are in accordance with the following:					None
7	RF	(a)	shades and insulated wells are used, and all glazing meets Table 11.703.2.5.2(a)					None
7	RF	(b)	horizontal skylights are less than 0.5 percent of finished ceiling area					None
7	RF	(c)	sloped skylights on slopes facing within 45 degrees of true south, east, or west are less than 1.5 percent of the finished ceiling area					None
7	RF	(7)	Overhangs or adjustable canopies or awnings or trellises provide shading on south-facing glass for the appropriate climate zone in accordance with Table 11.703.6.1(7);					None
7	RF	(8)	The south face windows have a SHGC of 0.40 or higher.					None
7	RF	(9)	Return air or transfer grilles/ducts are in accordance with Section 11.705.4.					None
7	RF		Multifamily Building Note: The site is designed such that at least 40 percent of the multifamily dwelling or sleeping units have one south facing wall (within 15 degrees) containing at least 50 percent of glazing for entire unit. Effective shading is required for passive solar control on all south facing glazing. The floor area of at least 15 feet from the south facing perimeter glazing is massive and exposed to capture solar heat during the day and radiate at night.					
7	RF	11.703.7.2	11.703.7.2 Window shading. Automated solar protection or dynamic glazing is installed to provide shading for windows.	1	0	0	<input type="checkbox"/>	None
7	RF	11.703.7.3	11.703.7.3 Passive cooling design. Passive cooling design features are in accordance with three or more of the following:					
7	RF		Points for three items:	3				
7	RF		Points for one additional item:	1				
7	RF	(1)	Exterior shading is provided on east and west windows using one or a combination of the following:					
7	RF	(a)	vine-covered trellises with the vegetation separated a minimum of 1 foot (305 mm) from face of building				<input type="checkbox"/>	None
7	RF	(b)	moveable awnings or louvers				<input type="checkbox"/>	None
7	RF	(c)	covered porches				<input type="checkbox"/>	None

7	RF	(d) attached or detached conditioned/unconditioned enclosed space that provides full shade of east and west windows (e.g., detached garage, shed, or building)				<input type="checkbox"/>		None
7	RF	(2) Overhangs are installed to provide shading on south-facing glazing in accordance with Section 11.703.7.1(7). [Points not awarded if points are taken under Section 11.703.7.1.]				<input type="checkbox"/>		None
7	RF	(3) Windows and/or venting skylights are located to facilitate cross and stack effect ventilation.				<input type="checkbox"/>		None
7	RF	(4) Solar reflective roof or radiant barrier is installed in climate zones 1, 2, or 3 and roof material achieves a 3-year aged criteria of 0.50.				<input checked="" type="checkbox"/>		None
7	RF	(5) Internal exposed thermal mass is a minimum of three inches (76 mm) in thickness. Thermal mass consists of concrete, brick, and/or tile fully adhered to a masonry base or other masonry material in accordance with one or a combination of the following:				<input type="checkbox"/>		None
7	RF	(a) A minimum of 1 square foot (0.09 m <sup>2</sup> ) of exposed thermal mass of floor per 3 square feet (2.8 m <sup>2</sup> ) of gross finished floor area.				<input type="checkbox"/>		None
7	RF	(b) A minimum of 3 square feet (2.8 m <sup>2</sup> ) of exposed thermal mass in interior walls or elements per square foot (0.09 m <sup>2</sup> ) of gross finished floor area.				<input type="checkbox"/>		None
7	RF	(6) Roofing material is installed with a minimum 0.75 inch (19 mm) continuous air space offset from the roof deck from eave to ridge.				<input type="checkbox"/>		None
7	RF	<b>11.703.7.4</b> <b>11.703.7.4 Passive solar heating design.</b> In addition to the sun-tempered design features in Section 11.703.7.1, all of the following are implemented: [Points shall not be awarded in the Tropical Climate Zone]	4	0	0	<input checked="" type="checkbox"/>		
7	RF	(1) Additional glazing, no greater than 12 percent, is permitted on the south wall. This additional glazing is in accordance with the requirements of Section 11.703.7.1.						None
7	RF	(2) Additional thermal mass for any room with south-facing glazing of more than 7 percent of the finished floor area is provided in accordance with the following:						
7	RF	(a) Thermal mass is solid and a minimum of 3 inches (76 mm) in thickness. Where two thermal mass materials are layered together (e.g., ceramic tile on concrete base) to achieve the appropriate thickness, they are fully adhered to (touching) each other.						None
7	RF	(b) Thermal mass directly exposed to sunlight is provided in accordance with the following minimum ratios:						None
7	RF	(i) Above latitude 35 degrees: 5 square feet (0.465 m <sup>2</sup> ) of thermal mass for every 1 square foot (0.0929 m <sup>2</sup> ) of south-facing glazing.						
7	RF	(ii) Latitude 30 degrees to 35 degrees: 5.5 square feet (0.51 m <sup>2</sup> ) of thermal mass for every 1 square foot (0.0929 m <sup>2</sup> ) of south-facing glazing.						
7	RF	(iii) Latitude 25 degrees to 30 degrees: 6 square feet (0.557 m <sup>2</sup> ) of thermal mass for every 1 square foot (0.0929 m <sup>2</sup> ) of south-facing glazing.						
7	RF	(c) Thermal mass not directly exposed to sunlight is permitted to be used to achieve thermal mass requirements of Section 11.703.7.4 (2) based on a ratio of 40 square feet (3.72 m <sup>2</sup> ) of thermal mass for every 1 square foot (0.0929 m <sup>2</sup> ) of south-facing glazing.						None
7	RF	(3) In addition to return air or transfer grilles/ducts required by Section 11.703.7.1(9), provisions for forced airflow to adjoining areas are implemented as needed.						None
7	RF	<b>11.705 ADDITIONAL PRACTICES</b>						
7	RF	<b>2 Practices from 11.705 required</b>						
7	RF	<b>11.705.2</b> <b>11.705.2 Lighting</b>						
7	RF	<b>11.705.2.1</b> <b>11.705.2.1 Lighting controls</b>						
7	F	[Percentages for point thresholds are based on lighting not required for means of egress or security lighting as defined by local building codes.]						
7	F	<b>11.705.2.1.1</b> <b>11.705.2.1.1 Interior lighting.</b> In dwelling units or sleeping units, permanently installed interior lighting fixtures are controlled with an occupancy sensor, or dimmer:		0	0			None
7	F	(1) 50 percent to less than 75 percent of lighting fixtures.	1					
7	F	(2) A minimum of 75 percent of lighting fixtures.	2					
7	F	<b>11.705.2.1.2</b> <b>11.705.2.1.2 Exterior lighting.</b> Photo or motion sensors are installed on 75 percent of outdoor lighting fixtures to control lighting. [Percentages for point thresholds does not include lighting equipped with photovoltaics.]	1	1	1	<input checked="" type="checkbox"/>		None
7	F	<b>11.705.2.1.3</b> <b>11.705.2.1.3 Multifamily common areas</b>						
7	F	(1) In a multifamily building, occupancy sensors, or dimmers are installed in common areas (except corridors and stairwells).		2	2			None
7	F	(a) 50 percent to less than 75 percent of lighting fixtures.	1					
7	F	(b) A minimum of 75 percent of lighting fixtures.	2					
7	F	(2) In a multifamily building, occupancy controls are installed to automatically reduce light levels in interior corridors and exit stairwells when the space is unoccupied. Light levels are reduced by:		0	0			None
7	F	(a) 50 percent to less than 75 percent or to local minimum requirements	2					
7	F	(b) A minimum of 75 percent	3					
7	F	<b>11.705.2.1.4</b> <b>11.705.2.1.4</b> In a multifamily building, occupancy controls are installed to automatically reduce light levels in garages and parking structures when the space is unoccupied. Light levels are reduced by:		0	0			None
7	F	(1) 50 percent to less than 75 percent or to local minimum requirements	2					
7	F	(2) A minimum of 75 percent	3					
7	RF	<b>11.705.2.2</b> <b>11.705.2.2 TDDs and skylights.</b> A tubular daylighting device (TDD) or a skylight that meets the requirements of Table 703.2.5.2(a) is installed in rooms without windows. [Points awarded per building.]	2	0	0	<input type="checkbox"/>		None
7	F	<b>11.705.2.3</b> <b>11.705.2.3 Lighting outlets.</b> Occupancy sensors are installed for a minimum of 80 percent of hard-wired lighting outlets in the interior living space.	1	0	0	<input checked="" type="checkbox"/>		None
7	F	<b>11.705.2.4</b> <b>11.705.2.4 Recessed luminaires.</b> The number of recessed luminaires that penetrates the thermal envelope is less than 1 per 400 square feet (37.16 m <sup>2</sup> ) of total conditioned floor area and they are in accordance with Section 11.701.4.3.5.	1	0	0		# of luminaires: per 6184 square feet	None
7	F	<b>11.705.3</b> <b>11.705.3 Induction cooktop.</b> Induction cooktop is installed.	1	0	0	<input checked="" type="checkbox"/>		None
7	RF	<b>11.705.4</b> <b>11.705.4 Return ducts and transfer grilles.</b> Return ducts or transfer grilles are installed in every room with a door. Return ducts or transfer grilles are not required for bathrooms, kitchens, closets, pantries, and laundry rooms.	2	2	2	<input checked="" type="checkbox"/>		None
7	RF	<b>11.705.5</b> <b>11.705.5 HVAC design and installation</b>						
7	RF	<b>11.705.5.1</b> <b>11.705.5.1</b> Meet one or both of the following:						
7	RF	(1) HVAC contractor is certified by the Air Conditioning Contractors of America Quality Assured Program (ACCA/QA) or by an EPA-recognized HVAC Quality Installation Training Oversight Organization (H-QUITO) or equivalent.	1	1	1	<input checked="" type="checkbox"/>		None
7	RF	(2) HVAC installation technician(s) is certified by North American Technician Excellence, Inc. (NATE) or equivalent.	1	0	0	<input type="checkbox"/>		None
7	F	<b>11.705.5.2</b> <b>11.705.5.2</b> Performance of the heating and/or cooling system is verified by the HVAC contractor in accordance with all of the following:	3	3	3	<input checked="" type="checkbox"/>		None
7	F	(1) Start-up procedure is performed in accordance with the manufacturer's instructions.						None
7	F	(2) Refrigerant charge is verified by super-heat and/or sub-cooling method.						None
7	F	(3) Burner is set to fire at input level listed on nameplate.						None
7	F	(4) Air handler setting/fan speed is set in accordance with manufacturer's instructions.						None
7	F	(5) Total airflow is within 10 percent of design flow.						None
7	F	(6) Total external system static does not exceed equipment capability at rated airflow.						None
7	F	<b>11.705.5.3</b> <b>11.705.5.3</b> HVAC Design is verified by 3rd party as follows:						
7	F	(1) The ENERGY STAR HVAC Design and Rater Design Review Checklists are completed and correct.	3	3	3	<input checked="" type="checkbox"/>		None
7	F	(2) HVAC installation is inspected and conforms to HVAC design documents and plans.	3	3	3	<input checked="" type="checkbox"/>		None
7	RF	<b>11.705.6</b> <b>11.705.6 Installation and performance verification</b>						
7	RF	<b>11.705.6.1</b> <b>11.705.6.1</b> Third-party on-site inspection is conducted to verify compliance with all of the following, as applicable. Minimum of two inspections are performed: one inspection after insulation is installed and prior to covering, and another inspection upon completion of the building. Where multiple buildings or dwelling units of the same model or sleeping units of the same model are built by the same builder, a representative sample inspection of a minimum of 15 percent of the buildings or dwelling units or sleeping units is permitted.	3	3	3		By using this tool, this project automatically qualifies for this practice.	None
7	RF	(1) Ducts are installed in accordance with the ICC IRC or IMC and ducts are sealed.						
7	RF	(2) Building envelope air sealing is installed.						
7	RF	(3) Insulation is installed in accordance with Section 11.701.4.3.2.1.						
7	RF	(4) Windows, skylights, and doors are flashed, caulked, and sealed in accordance with manufacturer's instructions and in accordance with Section 11.701.4.3.						
7	F	<b>11.705.6.2</b> <b>11.705.6.2</b> Testing. Testing is conducted to verify performance.						
7	F	<b>11.705.6.2.1</b> <b>11.705.6.2.1</b> Air leakage validation of building or dwelling units or sleeping units. A visual inspection is performed as described in 11.701.4.3.2(2) and air leakage testing is performed in						



7	RF	vehicle charging station is installed on the building site. (Note: Charging station shall not be included in the building energy consumption.)	2	0	0		
7	RF						
7	RF	<b>11.706.9 CNG vehicle fueling station.</b> A CNG vehicle residential fueling appliance is installed on the building site. The CNG fueling appliances shall be listed in accordance with ANSI/CSA NGV 5.1 and installed in accordance to the appliance manufacturer's installation instructions. (Note: The fueling appliance shall not be included in the building energy consumption.)	1	0	0	<input type="checkbox"/>	None
7	RF						
7	RF	<b>11.706.10 Automatic demand response.</b> Automatic demand response system is installed that curtails energy usage upon a signal from the utility or an energy service provider is installed. [where points awarded in Section 11.706.10, points shall not be awarded in Section 11.706.3 and 11.706.7]	1	0	0	<input type="checkbox"/>	None
7	RF						
7	RF	<b>11.706.11 Grid-interactive battery storage system.</b> A grid-interactive battery storage system of not less than 6 kWh of available capacity is installed.	2	0	0	<input type="checkbox"/>	None
7	RF						
7	RF	<b>11.706.12 Smart ventilation.</b> A whole-building ventilation systems is installed with automatic ventilation controls to limit ventilation during periods of extreme temperature, extreme humidity, and/or during times of peak utility loads and is in accordance with the specifications of ASHRAE Standard 62.2-2010 Section 4.	1	0	0	<input type="checkbox"/>	None
7	RF						
7	F	<b>11.706.13 Alternative refrigerant.</b> Use of the following in mechanical space cooling systems for dwellings.		0	0		None
7	F	(1) Use alternative refrigerant with a GWP < 1000	1				
7	F	(2) Do not use refrigerants	2				
7	P	<b>11.706.14 Third-party utility benchmarking service.</b>					
7	P	(1) For a multifamily building, the owner has contracted with a third-party utility benchmarking service with at least five (5) years of experience in utility data management and analysis to perform a monthly analysis of whole-building energy and water consumption for a minimum of 1 year.	3	3	3	<input type="checkbox"/>	None
7	P						
7	F	(2) The building owner commits to reporting energy data using U.S. Environmental Protection Agency's ENERGY STAR Portfolio Manager for a minimum of three years.	1	0	0	<input type="checkbox"/>	None
7	F						
7	RF	<b>11.706.15 Entryway air seal.</b> For multifamily buildings, where not required by the building or energy code, to slow the movement of unconditioned air from outdoors to indoors at the main building entrance, the following is installed:					
7	RF						
7	RF	(1) Building entry vestibule.	2	0	0	<input type="checkbox"/>	None
7	RF	(2) Revolving entrance doors.	2	0	0	<input type="checkbox"/>	None

11.801 INDOOR AND OUTDOOR WATER USE										
8 P	RF	11.801.0	11.801.0 Intent. Implement measures that reduce indoor and outdoor water usage. Implement measures that include collection and use of alternative sources of water. Implement measures that treat water on site.							
8 P	R	11.801.1	11.801.1 Mandatory requirements. The building shall comply with Section 11.802 (Prescriptive Path) and 11.803 (Innovative Practices) or Section 305.2.6.1 (Performance Path). Points from Section 305.2.6.1 (Performance Path) shall not be combined with points from Section 11.802 (Prescriptive Path) or Section 11.803 (Innovative Practices). The mandatory provisions of Section 11.802 (Prescriptive Path) are required when using Section 305.2.6.1 (Performance Path) for Chapter 11.8 Water Efficiency compliance.						Prescriptive Path	
8 P	RF	305.2.6.1	305.2.6.1 Water consumption reduction path. The water efficiency rating level shall be based on the reduction in water consumption resulting from the remodel in accordance with Table 305.2.6.1.							
8 P	RF		See Table 305.2.6.1							
8 P	RF		Water consumption shall be based on the estimated annual use as determined by a third-party audit and analysis or use of utility consumption data. The reduction shall be the percentage difference between the consumption before and after the remodel calculated as follows:							None
8 P	RF		$\frac{[(\text{consumption before remodel} - \text{consumption after remodel}) / \text{consumption before remodel}] * 100\%}{\text{Water Reduction:}}$							
8 P	RF		The occupancy and lifestyle assumed and the method of making the water consumption estimates shall be the same for estimates before and after the remodel. The building configuration for the after-remodel estimate shall include any changes to the configuration of the building such as additions or new points of water use. For multifamily buildings, the water consumption shall be based on the entire building including all dwelling units and common areas.							
8 P	RF		Where a building can demonstrate through documentation approved by the Adopting Entity that the remodel activities started prior to project registration, the water baseline (consumption before remodel) shall be calculated based on data and building systems that existed in the building up to 3 years prior to project registration.							
8 P	RF	11.802	PRESCRIPTIVE PATH							
8 P	RF	11.802.1	11.802.1 Indoor hot water usage. Indoor hot water supply system is in accordance with one of the practices listed in items (1) through (5). The maximum water volume from the source of hot water to the termination of the fixture supply is determined in accordance with Tables 11.802.1(1) or 11.802.1(2). The maximum pipe length from the source of hot water to the termination of the fixture supply is 50 feet.	0	0					
8 P	RF		[Where more than one water heater is used or where more than one type of hot water supply system, including multiple circulation loops, is used, points are awarded only for the system that qualifies for the minimum number of points.]							
8 P	RF		[Systems with circulation loops are eligible for points only if pumps are demand controlled. Circulation systems with timers or aquastats and constant-on circulation systems are not eligible to receive points.]							
8 P	RF		[Points awarded only if the pipes are insulated in accordance with Section 11.705.6.3.]							
8 P	RF	(1)	The maximum volume from the water heater to the termination of the fixture supply at furthest fixture is 128 ounces (1 gallon or 3.78 liters).	8						None
8 P	RF	(2)	The maximum volume from the water heater to the termination of the fixture supply at furthest fixture is 64 ounces (0.5 gallon or 1.89 liters).	12						None
8 P	RF	(3)	The maximum volume from the water heater to the termination of the fixture supply at furthest fixture is 32 ounces (0.25 gallon or 0.945 liters).	20						None
8 P	RF	(4)	A demand controlled hot water priming pump is installed on the main supply pipe of the circulation loop and the maximum volume from this supply pipe to the furthest fixture is 24 ounces (0.19 gallons or 0.71 liters).	24						None
8 P	RF	(a)	The volume in the circulation loop (supply) from the water heater or boiler to the branch for the furthest fixture is no more than 128 ounces (1 gallon or 3.78 liters).	4 Additional						None
8 P	RF	(5)	A central hot water recirculation system is implemented in multifamily buildings in which the hot water line distance from the recirculating loop to the engineered parallel piping system (i.e., manifold system) is less than 30 feet (9.144 m) and the parallel piping to the fixture fittings contains a maximum of 64 ounces (1.89 liters) [115.50 cubic inches] (0.50 gallons).	9						None
8 P	RF	(6)	Tankless water heater(s) with at least 0.5 gallon (1.89 liters) of storage are installed, or a tankless water heater that ramps up to at least 110F within 5 seconds is installed. The storage may be internal or external to the tankless water heater.	4 Additional	0	0				None
8 P	F	11.802.2	11.802.2 Water-conserving appliances. Energy Star or equivalent water-conserving appliances are installed.							
8 P	F	(1)	dishwasher	2	0	0				None
8 P	F	(2)	clothes washer, or	13	0	0				None
8 P	F	(3)	clothes washer with an integrated Water Factor of 3.8 or less	18	0	0				None
8 P	F		Multi-family Building Note: Washing machines are installed in individual units or provided in common areas of multifamily buildings.							
8 P	F	11.802.3	11.802.3 Water usage metering. Water meters are installed meeting the following:							
8 P	F	(1)	Single-Family Buildings: Water Usage Metering:							
8 P	F	(a)	Where not otherwise required by the local AHJ, installation of a meter for water consumed from any source associated with the building or building site.	2 per unique meter	0	0				None
8 P	F	(b)	Each water meter shall be capable of communicating water consumption data remotely for the dwelling unit occupant and be capable of providing daily data with electronic data storage and reporting capability that can produce reports for daily, monthly, and yearly water consumption. (Fire sprinkler systems are not required to be metered).	2 per sensor package	0	0				None
8 P	F	(2)	Multi-Family Buildings: Water Usage Metering:							
8 P	F		[Points earned in Section 11.802.3(2) shall not exceed 50% of the total points earned for the Indoor and Outdoor Water Use Category]	Points Reduced						
8 P	F	(a)	Where not otherwise required by the local AHJ, installation of a meter for water consumed from any source associated with the building or building site.	2 per unique use meter	48					None
8 P	F	(b)	Each water meter shall be capable of communicating water consumption data remotely for the dwelling unit occupant and be capable of providing daily data with electronic data storage and reporting capability that can produce reports for daily, monthly, and yearly water consumption. (Fire sprinkler systems are not required to be metered).	2 per sensor package	0					None
8 P	F	11.802.4	11.802.4 Showerheads. Showerheads are in accordance with the following:							
8 P	F	(1)	The total maximum combined flow rate of all showerheads in a shower compartment with floor area of 2600 square inches or less is equal or less than 2.0 gpm. For each additional 1300 square inches or any portion thereof of shower compartment floor area, an additional 2.0 gpm combined showerhead flow rate is allowed. Showerheads shall comply with ASME A112.18.1/CSA B125.1 and shall meet the performance criteria of the U.S. EPA WaterSense Specification for showerheads. Showerheads shall be served by an automatic compensating valve that complies with ASSE 1016/ASME A112.1016/CSA B125.16 or ASME A112.18.1/CSA B125.1 and specifically designed to provide thermal shock and scald protection at the flow rate of the showerhead.	4 for first compartment 1 for each additional compartment in dwelling 7 Max	4	4				None
8 P	F	(2)	All shower compartments in the dwelling unit(s) or sleeping unit(s) and common areas meet the requirements of 11.802.4(1) and all showerheads are in accordance with one of the following:		10	10				None
8 P	F	(a)	maximum of 1.8 gpm	6 Additional						
8 P	F	(b)	maximum of 1.5 gpm	10 Additional						
8 P	F	(3)	Any shower control that can shut off water flow without affecting temperature is installed. [Points awarded per shower control.] For SI: 1 gallon per minute = 3.785 L/m	1 3 Max	0	0				None
8 P	F	11.802.5	11.802.5 Faucets							
8 P	F	11.802.5.1	11.802.5.1 Install water-efficient lavatory faucets with flow rates not more than 1.5 gpm (5.7 L/min), tested in compliance with ASME A112.18.1/CSA B125.1 and meeting the performance criteria of the EPA WaterSense High-Efficiency Lavatory Faucet Specification:		13	13				None
8 P	F	(1)	Flow rate ≤ 1.5 gpm [*all faucets in a bathroom are in compliance] [Points awarded for each bathroom. In multifamily buildings, the average of the points assigned to individual dwelling units or sleeping units may be used as the number of points awarded for this practice, rounded to the nearest whole number.]	1 [3 max*]						
8 P	F	(2)	Flow rate ≤ 1.20 gpm [*all faucets in a bathroom are in compliance]	2 [6 max*]						
8 P	F	(3)	Flow rate ≤ 1.5 gpm for all lavatory faucets in the dwelling unit(s) or sleeping unit(s)	6 Additional						

8 P	F	(4)	Flow rate ≤ 1.5 gpm for all lavatory faucets in the dwelling unit(s), and at least one bathroom has faucets with flow rates ≤ 1.20 gpm	8 Additional					
8 P	F	(5)	Flow rate ≤ 1.20 gpm for all lavatory faucets in the dwelling unit(s)	12 Additional					
8 P	F	11.802.5.2	11.802.5.2 Water-efficient residential kitchen faucets are installed in accordance with ASME A112.18.1/CSA B125.1. Residential kitchen faucets may temporarily increase the flow above the maximum rate but not to exceed 2.2 gpm.	4	4				None
8 P	F	(1)	All residential kitchen faucets have a maximum flow rate of 1.8 gpm.	3					
8 P	F	(2)	All residential kitchen faucets have a maximum flow rate of 1.5 gpm.	1 Additional					
8 P	F	11.802.5.3	11.802.5.3 Self-closing valve, motion sensor, metering, or pedal-activated faucet is installed to enable intermittent on/off operation. [Points awarded per fixture.]	1	0	0			None
8 P	F			3 Max					
8 P	F	11.802.5.4	11.802.5.4 Water closets and urinals. Water closets and urinals are in accordance with the following:						
8 P	F	(1)	Gold and emerald levels: All water closets and urinals are in accordance with Section 11.802.5.4.	Met					None
8 P	F	(2)	A water closet is installed with an effective flush volume of 1.28 gallons (4.85 L) or less in accordance with ASME A112.19.2/CSA B45.1 or ASME A112.19.14 as applicable. Tank-type water closets shall be in accordance with the performance criteria of the U.S. EPA WaterSense Specification for Tank-Type Toilets [Points awarded per fixture. In multifamily buildings, the average of the points assigned to individual dwelling units or sleeping units may be used as the number of points awarded for this practice, rounded to the nearest whole number.]	4	4	4			None
8 P	F			12 Max					
8 P	F	(3)	All water closets are in accordance with Section 11.802.5(2).	13 Additional	13	13			None
8 P	F	(4)	All water closets are in accordance with Section 11.802.5(2) and one or more of the following are installed:						
8 P	F	(a)	Water closets that have an effective flush volume of 1.2 gallons or less. [Points awarded per toilet. In multifamily buildings, the average of the points assigned to individual dwelling units or sleeping units may be used as the number of points awarded for this practice, rounded to the nearest whole number.]	2 Additional	0	0			None
8 P	F			6 Max					
8 P	F	(b)	One or more urinals with a flush volume of 0.5 gallons (1.9L) or less when tested in accordance with ASME A112.19.2/CSA B45.1.	2 Additional	0	0			None
8 P	F	(c)	One or more composting or waterless toilets and/or nonwater urinals. Nonwater urinals shall be tested in accordance with ASME A112.19.2/CSA B45.1.	12 Additional	0	0			None
8 P	F	11.802.6	11.802.6 Irrigation systems						
8 P	F	11.802.6.1	11.802.6.1 Where an irrigation system is installed, an irrigation plan and implementation are executed by a qualified professional or equivalent.	Mandatory					None
8 P	F	11.802.6.2	11.802.6.2 Irrigation sprinkler nozzles shall be tested according to ANSI standard ASABE/ICC 802-2014 Landscape Irrigation Sprinkler and Emitter Standard by an accredited third party laboratory.	6	0	0			None
8 P	F	11.802.6.3	11.802.6.3 Drip irrigation is installed.						
8 P	F	(1)	Drip irrigation is installed for all landscape beds.	4	0	0			None
8 P	F	(2)	Subsurface drip is installed for all turf grass areas.	4	0	0			None
8 P	F	(3)	Drip irrigation zones specifications show plant type by name and water use/need for each emitter [Points awarded only if specifications are implemented.]	5	0	0			None
8 P	F	11.802.6.4	11.802.6.4 The irrigation system(s) is controlled by a smart controller or no irrigation is installed. [Points are not additive.]						
8 P	F	(1)	Irrigation controllers shall be in accordance with the performance criteria of the EPA WaterSense program	10	0	0			None
8 P	F	(2)	No irrigation is installed and a landscape plan is developed in accordance with Section 11.503.5, as applicable.	15	0	0			None
8 P	F	11.802.6.5	11.802.6.5 Commissioning and water use reduction for irrigation systems. [Points are not additive per each section.]						
8 P	F	(1)	All irrigation zones utilize pressure regulation so emission devices (sprinklers and drip emitters) operate at manufacturer's recommended operating pressure.	3	0	0			None
8 P	F	(2)	Where dripline tubing is installed, a filter with mesh size in accordance with the manufacturer's recommendation is installed on all drip zones.	3	0	0			None
8 P	F	(3)	Utilize spray bodies that incorporate an in-stem or external flow shut-off device.	3	0	0			None
8 P	F	(4)	For irrigation systems installed on sloped sites, either an in-stem or external check valve is utilized for each spray body.	3	0	0			None
8 P	F	(5)	Where an irrigation system is installed, a flow sensing device is installed to monitor and alert the controller when flows are outside design range.	3	0	0			None
8 P	F	11.802.7	11.802.7 Rainwater collection and distribution. Rainwater collection and distribution is provided.						
8 P	F	11.802.7.1	11.802.7.1 Rainwater is used for irrigation in accordance with one of the following:		0	0			None
8 P	F	(1)	Rainwater is diverted for landscape irrigation without impermeable water storage	5					
8 P	F	(2)	Rainwater is diverted for landscape irrigation with impermeable water storage in accordance with one of the following:						
8 P	F	(a)	50 – 499 gallon storage capacity	5					
8 P	F	(b)	500 – 2499 gallon storage capacity	10					
8 P	F	(c)	2500 gallon or larger storage capacity (system is designed by a professional certified by The American Rainwater Catchment Systems Association or equivalent)	15					
8 P	F	(d)	All irrigation demands are met by rainwater capture (documentation demonstrating the water needs of the landscape is provided and the system is designed by a professional certified by The American Rainwater Catchment Systems Association or equivalent).	25					
8 P	F	11.802.7.2	11.802.7.2 Rainwater is used for indoor domestic demand as follows. The system is designed by a professional certified by The American Rainwater Catchment Systems Association or equivalent.		0	0			
8 P	F	(1)	Rainwater is used to supply an indoor appliance or fixture for any locally approved use. [Points awarded per appliance or fixture.]	5					None
8 P	F			15 Max					
8 P	F	(2)	Rainwater provides for total domestic demand. Where rainwater is used as potable water the potable rainwater system shall meet the requirements of IRC Sections P2906 and Section P2912. The following shall also apply:	25					None
8 P	F	(a)	The following roof materials shall not be used to collect rainwater: shingles with fire retardant, copper, and materials that contain asbestos. Materials that contain lead, including but not limited to flashings and roof jacks, shall be prohibited.						
8 P	F	(b)	Potable water supplies shall be protected against cross connection with rainwater as specified in IRC Section P2902.1.						
8 P	F	(c)	Disinfection shall be provided by at least one of the following:						
8 P	F	(i)	Ultraviolet (UV) light providing at least 40 mJ/cm <sup>2</sup> at 254 nm for the highest water flow rate. A UV sensor with visible alarm, audible alarm, or water shutoff shall be triggered when the UV light is below the minimum at the sensor. In addition filtration no greater than 5 µm shall be located upstream of the UV light or						
8 P	F	(ii)	filtration no greater than 0.2 µm, or						
8 P	F	(iii)	other approved disinfection						
8 P	F	(d)	Materials and systems that collect, convey, pump, or store rainwater for potable rainwater systems shall comply with NSF 53, NSF 61 or equivalent.						
8 P	F	(e)	The quality of the water at the point of use shall be verified in accordance with the requirements of the jurisdiction.						
8 P	F	(f)	The rainwater storage shall not admit sunlight.						
8 P	F	(g)	Potable rainwater pipe shall not be required to be purple after the point that the water is disinfected.						
8 P	F	11.802.8	11.802.8 Sediment filters. Water filter is installed to reduce sediment and protect plumbing fixtures for the whole building or the entire dwelling unit or the sleeping unit.	1	0	0			None
8 P	F	11.802.9	11.802.9 Water treatment devices.						
8 P	F	11.802.9.1	11.802.9.1 Water Softeners shall not be installed where the supplied water hardness is less than 8.0 grains per gallon measured as total calcium carbonate equivalents. Water softeners shall be listed to NSF 44 and a rated salt efficiency of 3400 grains of total hardness per 1.0 pound of salt based on sodium chloride equivalency. Devices shall not discharge more than 4.0 gallons of water per 1000 grains of hardness removed during the service or recharge cycle.		0	0			None
8 P	F	(1)	No water softener.	5					
8 P	F	(2)	Water softener installed to supply softened water only to domestic water heater.	2					
8 P	F	11.802.9.2	11.802.9.2 Reverse Osmosis (R/O) water treatment systems shall be listed to NSF 58 and shall include automatic shut-off valve to prevent water discharge when storage tank is full.		0	0			None

8	F	(1)	No R/O system.	3					
8	F	(2)	Combined capacity of all R/O systems does not exceed 0.75 gallons.	1					
8	F	<b>11.802.10</b>	<b>11.802.10 Pools and spas.</b>						
8	F	<b>11.802.10.1</b>	<b>11.802.10.1 Pools and Spas</b> with water surface area greater than 36 square feet and connected to a water supply shall have a dedicated meter to measure the amount of water supplied to the pool or spa.	<b>Mandatory</b>				None	
8	F	(1)	Automated motorized non-permeable pool cover that covers the entire pool surface.	10	0	0		None	
8	RF	<b>11.803 INNOVATIVE PRACTICES</b>							
8	RF	<b>11.803.1</b>	<b>11.803.1 Reclaimed, gray, or recycled water.</b> Reclaimed, gray, or recycled water is used as permitted by applicable code.		0	0			
8	RF		[Points awarded for either Section 11.803.1(1) or 11.803.1(2), not both.]						
8	RF		[Points awarded for either Section 11.803.6 or 11.803.1, not both.]						
8	RF	(1)	each water closet flushed by reclaimed, gray, or recycled water	5				None	
8	RF		[Points awarded per fixture or appliance.]	20 Max					
8	RF	(2)	irrigation from reclaimed, gray, or recycled water on-site	10				None	
8	RF	<b>11.803.2</b>	<b>11.803.2 Reclaimed water, greywater, or rainwater pre-piping.</b> Reclaimed, graywater, or rainwater systems are rough plumbed (and permanently marked, tagged or labeled) into buildings for future use.	3 per roughed in system	0	0	# of systems:	None	
8	RF								
8	F	<b>11.803.3</b>	<b>11.803.3 Automatic leak detection and control devices.</b> One of the following devices is installed. Where a fire sprinkler system is present, the device will be installed to not interfere with the operation of the fire sprinkler system.	2	0	0		None	
8	F								
8	F	(1)	automatic water leak detection and control devices						
8	F	(2)	automatic water leak detection and shutoff devices						
8	F	<b>11.803.4</b>	<b>11.803.4 Engineered biological system or intensive bioremediation system.</b> An engineered biological system or intensive bioremediation system is installed and the treated water is used on site. Design and implementation are approved by appropriate regional authority.	20	0	0		None	
8	F								
8	F	<b>11.803.5</b>	<b>11.803.5 Recirculating humidifier.</b> Where a humidifier is required, a recirculating humidifier is used in lieu of a traditional "flow through" type.	1	0	0		None	
8	F								
8	F	<b>11.803.6</b>	<b>11.803.6 Advanced wastewater treatment system.</b> Advanced wastewater (aerobic) treatment system is installed and treated water is used on site.	20	0	0		None	
8	F		[Points awarded for either Section 11.803.6 or 11.803.1, not both.]						

11.901 POLLUTANT SOURCE CONTROL							
9	RF	11.901.0	11.901.0 Intent. Pollutant sources are controlled.				
9	RF	11.901.1	11.901.1 Space and water heating options				
9	RF	11.901.1.1	11.901.1.1 Natural draft furnaces, boilers, or water heaters are not located in conditioned spaces, including conditioned crawlspaces, unless located in a mechanical room that has an outdoor air source and is sealed and insulated to separate it from the conditioned space(s).	5	0	0	None
9	RF		(Points are awarded only for buildings that use natural draft combustion space or water heating equipment.)				
9	R	11.901.1.2	11.901.1.2 Air handling equipment or return ducts are not located in the garage, unless placed in isolated, air-sealed mechanical rooms with an outside air source.	5	0	0	None
9	R		Not available if there is no attached garage				
9	RF	11.901.1.3	11.901.1.3 The following combustion space heating or water heating equipment is installed within conditioned space:				
9	RF	(1)	all furnaces or all boilers	3	0	0	None
9	RF	(a)	power vent furnace(s) or boiler(s)	3			
9	RF	(b)	direct vent furnace(s) or boiler(s)	5			
9	RF	(2)	all water heaters	3	0	0	None
9	RF	(a)	power vent water heater(s)	3			
9	RF	(b)	direct vent water heater(s)	5			
9	R	11.901.1.4	11.901.1.4 Newly installed gas-fired fireplaces and direct heating equipment is listed and is installed in accordance with the NFPA 54, ICC IFGC, or the applicable local gas appliance installation code. Gas-fired fireplaces within dwelling units or sleeping units and direct heating equipment are vented to the outdoors. Alcohol burning devices and kerosene heaters are vented to the outdoors.	Mandatory			None
9	RF	11.901.1.5	11.901.1.5 Natural gas and propane fireplaces are direct vented, have permanently fixed glass fronts or gasketed doors, and comply with CSA Z21.88/CSA 2.33 or CSA Z21.506/CSA 2.22b.	7	0	0	None
9	RF	11.901.1.6	11.901.1.6 The following electric equipment is installed:		5	5	None
9	RF	(1)	heat pump air handler in unconditioned space	2			
9	RF	(2)	heat pump air handler in conditioned space	5			
9	RF	11.901.2	11.901.2 Solid fuel-burning appliances				
9	RF	11.901.2.1	11.901.2.1 Newly installed solid fuel-burning fireplaces, inserts, stoves and heaters are code compliant and are in accordance with the following requirements:				
9	RF	(1)	Site-built masonry wood-burning fireplaces use outside combustion air and include a means of sealing the flue and the combustion air outlets to minimize interior air (heat) loss when not in operation.	N/A	4	0	None
9	RF	(2)	Factory-built, wood-burning fireplaces are in accordance with the certification requirements of UL 127 and are an EPA Phase 2 Emission Level Qualified Model.	N/A	6	0	None
9	RF	(3)	Wood stove and fireplace inserts, as defined in UL 1482 Section 3.8, are in accordance with the certification requirements of UL 1482 and are in accordance with the emission requirements of the EPA Certification and the State of Washington WAC 173-433-100(3).	N/A	6	0	None
9	RF	(4)	Pellet (biomass) stoves and furnaces are in accordance with ASTM E1509 or are EPA certified.	N/A	6	0	None
9	RF	(5)	Masonry heaters are in accordance with the definitions in ASTM E1602 and ICC IRC Section 2112.1.	N/A	6	0	None
9	RF	11.901.2.2	11.901.2.2 Fireplaces, woodstoves, pellet stoves, or masonry heaters are not installed.	6	6	6	None
9	RF	11.901.3	11.901.3 Garages. Garages are in accordance with the following:				
9	RF	(1)	Attached garage				
9	F	(a)	Where installed in the common wall between the attached garage and conditioned space, the door is tightly sealed and gasketed.	N/A	2	0	None
9	R	(b)	A continuous air barrier is provided between walls and ceilings separating the garage space from the conditioned living spaces.	N/A	2	0	None
9	F	(c)	For one- and two-family dwelling units, a 100 cfm (47 L/s) or greater ducted or 70 cfm (33 L/s) cfm or greater unducted wall exhaust fan is installed and vented to the outdoors and is designed and installed for continuous operation or has controls (e.g., motion detectors, pressure switches) that activate operation for a minimum of 1 hour when either human passage door or roll-up automatic doors are operated. For ducted exhaust fans, the fan airflow rating and duct sizing are in accordance with ASHRAE Standard 62.2-2007 Section 7.3.	8	0	0	None
9	RF	(2)	A carport is installed, the garage is detached from the building, or no garage is installed.	10	10	10	None
9	RF	11.901.4	11.901.4 Wood materials. A minimum of 85 percent of newly installed material within a product group (i.e., wood structural panels, countertops, composite trim/doors, custom woodwork, and/or component closet shelving) is manufactured in accordance with the following:	10 Max	0	0	
9	R	(1)	Structural plywood used for floor, wall, and/or roof sheathing is compliant with DOC PS 1 and/or DOC PS 2. OSB used for floor, wall, and/or roof sheathing is compliant with DOC PS 2. The panels are made with moisture-resistant adhesives. The trademark indicates these adhesives as follows: Exposure 1 or Exterior for plywood, and Exposure 1 for OSB.	Mandatory			None
9	R		NOTE: If "N/A" is selected, please explain in the Notes area.				
9	RF		Countertops				None
9	RF		Composite trim/doors				
9	RF		Custom woodwork				
9	RF		Component closet shelving				
9	RF	(2)	Particleboard and MDF (medium density fiberboard) is manufactured and labeled in accordance with CPA A208.1 and CPA A208.2, respectively.	2			
9	RF	(3)	Hardwood plywood in accordance with HPVA HP-1.	2			
9	RF	(4)	Particleboard, MDF, or hardwood plywood is in accordance with CPA 4.	3			
9	RF	(5)	Composite wood or agrifiber panel products contain no added urea-formaldehyde or are in accordance with the CARB Composite Wood Air Toxic Contaminant Measure Standard.	4			
9	RF	(6)	Non-emitting products.	4			
9	F	11.901.5	11.901.5 Cabinets. A minimum of 85 percent of newly installed cabinets are in accordance with one or both of the following:				
9	F		(Where both of the following practices are used, only 3 points are awarded.)				
9	F	(1)	All parts of the cabinet are made of solid wood or non-formaldehyde emitting materials such as metal or glass.	5	0	0	None
9	F	(2)	The composite wood used in wood cabinets is in accordance with CARB Composite Wood Air Toxic Contaminant Measure Standard or equivalent as certified by a third-party program such as, but not limited to, those in Appendix B.	3	0	0	None
9	P	11.901.6	11.901.6 Carpets. Wall-to-wall carpeting is not installed adjacent to water closets and bathing fixtures.	Mandatory			None
9	F	11.901.7	11.901.7 Floor materials. The following types of finished flooring materials are used. The materials have emission levels in accordance with CDPH/EHLB Standard Method v1.1. Product is tested by a laboratory with the CDPH/EHLB Standard Method v1.1 within the laboratory scope of accreditation to ISO/IEC 17025 and certified by a third-party program accredited to ISO 17065, such as, but not limited to, those in Appendix B.	1	8 Max	0	
9	F		(Points are awarded for every 10% of conditioned floor space using one of the below materials.)				
9	F	(1)	Hard surface flooring: Prefinished installed hard-surface flooring is installed. Where post-manufacture coatings or surface applications have not been applied, the following hard surface flooring types are deemed to comply with the emission requirements of this practice:				actual %:
9	F	(a)	Ceramic tile flooring				
9	F	(b)	Organic-free, mineral-based flooring				
9	F	(c)	Clay masonry flooring				
9	F	(d)	Concrete masonry flooring				
9	F	(e)	Concrete flooring				
9	F	(f)	Metal flooring				
9	F	(g)	Glass				
9	F	(2)	Carpet meeting and carpet cushion not meeting the emission limits is installed.				actual %:
9	F	(3)	Carpet and carpet cushion meeting the emission limits is installed. (When carpet cushion meeting the emission limits of the practice is also installed, the percentage of compliant carpet area is calculated at 1.33 times the actual installed area.)				
9	F	11.901.8	11.901.8 Wall coverings. When at least 10 percent of the interior wall surfaces are covered, a minimum of 85 percent of wall coverings are in accordance with the emission concentration limits of CDPH/EHLB Standard Method v1.1. Emission levels are determined by a laboratory	4	0	0	None

9	F	accredited to ISO/IEC 17025 and the CDPH/EHLB Standard Method v1.1 is in its scope of accreditation. The product is certified by a third-party program accredited to ISO 17065, such as, but not limited to, those in Appendix B.							
9	P	<b>11.901.9</b> <b>11.901.9 Interior architectural coatings.</b> A minimum of 85 percent of newly applied interior architectural coatings are in accordance with either Section 11.901.9.1 or Section 11.901.9.3, not both. A minimum of 85 percent of architectural colorants are in accordance with Section 11.901.9.2.							None
9	P	<b>11.901.9.1</b> <b>11.901.9.1</b> Site-applied interior architectural coatings, which are inside the water proofing envelope, are in accordance with one or more of the following:	5	5	5				
9	P	(1) Zero VOC as determined by EPA Method 24 (VOC content is below the detection limit for the method)							None
9	P	(2) GreenSeal GS-11							None
9	P	(3) CARB Suggested Control Measure for Architectural Coatings (see Table 11.901.9.1). <a href="#">See Table 11.901.9.1</a>							None
9	F	<b>11.901.9.2</b> <b>11.901.9.2</b> Architectural coating colorant additive VOC content is in accordance with Table 901.9.2.  (Points for 11.901.9.2 are awarded only if base architectural coating is in accordance with 11.901.9.1.)  <a href="#">See Table 11.901.9.2</a>	1	0	0				None
9	F	<b>11.901.9.3</b> <b>11.901.9.3</b> Site-applied interior architectural coatings, which are inside the waterproofing envelope, are in accordance with the emission levels of CDPH/EHLB Standard Method v1.1. Emission levels are determined by a laboratory accredited to ISO/IEC 17025 and the CDPH/EHLB Standard Method v1.1 in its scope of accreditation. The product is certified by a third-party program accredited to ISO 17065, such as, but not limited to, those found in Appendix B.	8	0	0				None
9	P	<b>11.901.9.4</b> <b>11.901.9.4</b> When the building is occupied during the remodel, a minimum of 85 percent of the newly applied interior architectural coatings are in accordance with either 11.901.9.1 or 11.901.9.3.	Mandatory						None
9	P	<b>11.901.10</b> <b>11.901.10 Interior adhesives and sealants.</b> Interior low-VOC adhesives and sealants located inside the water proofing envelope; A minimum of 85 percent of newly applied site-applied products used within the interior of the building are in accordance with one of the following, as applicable.		5	5				
9	P	(1) The emission levels of CDPH/EHLB Standard Method v1.1. Emission levels are determined when tested by a laboratory accredited to ISO/IEC 17025 and the CDPH/EHLB Standard Method v1.1 is in its scope of accreditation. The product is certified by a third-party program accredited to ISO 17065, such as, but not limited to, those found in Appendix B.	8						None
9	P	(2) GreenSeal GS-36	5						None
9	P	(3) SCAQMD Rule 1168 in accordance with Table 11.901.10(3), excluding products that are sold in 16 ounce containers or less and are regulated by the California Air Resources Board (CARB) Consumer Products Regulations.  <a href="#">See Table 11.901.10(3)</a>	5						None
9	RF	<b>11.901.11</b> <b>11.901.11 Insulation.</b> Emissions of 85 percent of newly installed wall, ceiling, and floor insulation materials are in accordance with the emission levels of CDPH/EHLB Standard Method v1.1. Emission levels are determined by a laboratory accredited to ISO/IEC 17025 and the CDPH/EHLB Standard Method v1.1 in its scope of accreditation. Insulation is certified by a third-party program accredited to ISO 17065, such as, but not limited to, those in Appendix B.	4	0	0				None
9	F	<b>11.901.12</b> <b>11.901.12 Furniture and Furnishings.</b> In a multifamily building, all furniture in common areas shall have VOC emission levels in accordance with ANSI/BIFMA e3-Furniture Sustainability Standard sections 7.6.1 and 7.6.2, tested in accordance with ANSI/BIFMA Standard Method M7.1. Emission levels are determined by a laboratory accredited to ISO/IEC 17025 and the ANSI/BIFMA Standard Method M7.1 in its scope of accreditation. Furniture and Furnishings are certified by a third-party program accredited to ISO 17065, such as, but not limited to, those in Appendix B.	2		0				None
9	P	<b>11.901.13</b> <b>11.901.13 Carbon monoxide (CO) alarms.</b> A carbon monoxide (CO) alarm is provided in accordance with the IRC Section R315.	Mandatory						None
9	F	<b>11.901.14</b> <b>11.901.14 Building entrance pollutants control.</b> Pollutants are controlled at all main building entrances by one of the following methods:		0	0				None
9	F	(1) Exterior grilles or mats are installed in a fixed manner and may be removable for cleaning.	1						None
9	F	(2) Interior grilles or mats are installed in a fixed manner and may be removable for cleaning.	1						None
9	P	<b>11.901.15</b> <b>11.901.15 Non-smoking areas.</b> Environmental tobacco smoke is minimized by one or more of the following:							
9	P	(1) All interior common areas of a multifamily building are designated as non-smoking areas with posted signage.	1	1	1				None
9	P	(2) Exterior smoking areas of a multifamily building are designated with posted signage and located a minimum of 25 feet from entries, outdoor air intakes, and operable windows.	1	1	1				None
9	F	<b>11.901.16</b> <b>11.901.16 Lead-safe work practices.</b> For buildings constructed before 1978, lead-safe work practices are used during the remodeling.	N/A						None
9	RF	<b>11.902 POLLUTANT CONTROL</b>							
9	F	<b>11.902.0</b> <b>11.902.0 Intent.</b> Pollutants generated in the building are controlled.							
9	P	<b>11.902.1</b> <b>11.902.1 Spot ventilation.</b>							
9	P	<b>11.902.1.1</b> <b>11.902.1.1</b> Spot ventilation is in accordance with the following:							
9	P	(1) Bathrooms are vented to the outdoors. The minimum ventilation rate is 50 cfm (23.6 L/s) for intermittent operation or 20 cfm (9.4 L/s) for continuous operation in bathrooms.	Mandatory						None
9	F	(a) A window complying with IRC Section R303.3 is provided in addition to mechanical ventilation.	1	0	0				None
9	P	(2) Clothes dryers (except listed and labeled condensing ductless dryers) are vented to the outdoors.	Mandatory						None
9	P	(3) Kitchen exhaust units and/or range hoods are ducted to the outdoors and have a minimum ventilation rate of 100 cfm (47.2 L/s) for intermittent operation or 25 cfm (11.8 L/s) for continuous operation.	8	8	8				None
9	P	<b>11.902.1.2</b> <b>11.902.1.2</b> Bathroom and/or laundry exhaust fan is provided with an automatic timer and/or humidistat:	11 Max	5	5		# of timers:		None
9	P	(1) for first device	5				# of humidistats:		None
9	P	(2) for each additional device	2						None
9	P	<b>11.902.1.3</b> <b>11.902.1.3</b> Kitchen range, bathroom, and laundry exhaust are verified to air flow specification. Ventilation airflow at the point of exhaust is tested to a minimum of:	8	8	8				None
9	P	(a) 100 cfm (47.2 L/s) intermittent or 25 cfm (11.8 L/s) continuous for kitchens, and							
9	P	(b) 50 cfm (23.6 L/s) intermittent or 20 cfm (9.4 L/s) continuous for bathrooms and/or laundry							
9	P	<b>11.902.1.4</b> <b>11.902.1.4</b> Exhaust fans are ENERGY STAR, as applicable.	12 Max	2	2		# of fans:		None
9	P	(1) ENERGY STAR, or equivalent, fans operating above 1 sone (Points awarded per fan.)	2						None
9	P	(2) ENERGY STAR, or equivalent, fans operating at or below 1 sone (Points awarded per fan.)	3						None
9	F	<b>11.902.1.5</b> <b>11.902.1.5</b> Fenestration in spaces other than those identified in 902.1.1 through 902.1.4 are designed for stack effect or cross-ventilation in accordance with all of the following:	3	0	0				
9	F	(1) Operable windows, operable skylights, or sliding glass doors with a total area of at least 15 percent of the total conditioned floor area are provided.							None
9	F	(2) Insect screens are provided for all operable windows, operable skylights, and sliding glass doors.							None
9	F	(3) A minimum of two operable windows or sliding glass doors are placed in adjacent or opposite walls. If there is only one wall surface in that space exposed to the exterior, the minimum windows or sliding glass doors may be on the same wall.							None
9	F	<b>11.902.1.6</b> <b>11.902.1.6 Ventilation for Multifamily Common Spaces.</b> Systems are implemented and are in accordance with the specifications of ASHRAE 62.1 and an explanation of the operation and importance of the ventilation system is included in 1002.1 and 1002.2 of NGBS.	3		0				None
9	P	<b>11.902.2</b> <b>11.902.2 Building ventilation systems.</b>							
9	P	<b>11.902.2.1</b> <b>11.902.2.1</b> One of the following whole building ventilation systems is implemented and is in accordance with the specifications of ASHRAE Standard 62.2-2010 Section 4 and an explanation of the operation and importance of the ventilation system is included in either 11.1001.1(9) or 11.1002.2(11).	N/A	3	3				None
9	P	(1) exhaust or supply fan(s) ready for continuous operation and with appropriately labeled controls	3						
9	P	(2) balanced exhaust and supply fans with supply intakes located in accordance with the manufacturer's guidelines so as to not introduce polluted air back into the building	6						

9 P F	(3)	heat-recovery ventilator	7					
9 P F	(4)	energy-recovery ventilator	8					
9 P F	(5)	Ventilation air is preconditioned by a system not specified above	10					
9 P F	11.902.2.2	11.902.2.2 Ventilation airflow is tested to achieve the design fan airflow in accordance with ANSI/RESNET/ICC 380 and Section 11.902.2.1.	4	4	4	<input checked="" type="checkbox"/>	None	
9 F	11.902.2.3	11.902.2.3 MERV filters 8 to 13 are installed on central forced air systems and are accessible. Designer or installer is to verify that the HVAC equipment is able to accommodate the greater pressure drop of MERV 8 to 13 filters.	2	0	0	<input checked="" type="checkbox"/>	None	
9 F	11.902.2.4	11.902.2.4 MERV filters 14 or greater are installed on central forced air systems and are accessible. Designer or installer is to verify that the HVAC equipment is able to accommodate the greater pressure drop of the filter used.	3	0	0	<input checked="" type="checkbox"/>	None	
9 F	11.902.2.5	11.902.2.5 All HVAC filter locations are designed such that they are readily accessible to the occupant.	3	0	0	<input checked="" type="checkbox"/>	None	
9 P RF	11.902.3	11.902.3 Radon reduction measures. Radon reduction measures are in accordance with IRC Appendix F or § 11.902.3.1. Radon Zones as identified by the AHU or, if the zone is not identified by the AHU, as defined in Figure 9(1). This practice is not mandatory if the existing building has been tested for radon and is in accordance with federal and local acceptable limits.				N/A	None	
9 P RF								
9 P RF								
9 P RF								
9 R	(1)	Buildings located in Zone 1			0	0		None
9 R	(a)	a passive radon system is installed						
9 R	(b)	an active radon system is installed			12			
9 R	(2)	Buildings located in Zone 2 or Zone 3			0	0		
9 R	(a)	a passive or active radon system is installed			6			
9 R	(b)	an active radon system is installed			12			
9 R	11.902.3.1	11.902.3.1 Radon reduction option. This option requires section 11.902.3.1.1 through 11.902.3.1.7.					None	
9 R	11.902.3.1.1	11.902.3.1.1 Soil-gas barriers and base course. A base course in accordance with Section 506.2.2 of the IRC shall be installed below slabs and foundations. There shall be a continuous gas-permeable base course under each soil-gas retarder that is separated by foundation walls or footings. Between slabs and the base course, damp proofing or water proofing shall be installed in accordance with Section 406 of the IRC. Punctures, tears and gaps around penetrations of the soil-gas retarder shall be repaired or covered with an additional soil-gas retarder. The soil-gas retarder shall be a continuous 6-mil (0.15 mm) polyethylene or an approved equivalent.						
9 R	11.902.3.1.2	11.902.3.1.2 Soil gas collection. There shall be an unobstructed path for soil gas flow between the void space installed in the base course and the vent through the roof. Soil gases below the foundation shall be collected by a perforated pipe with a diameter of not less than 4 inches (10 cm) and not less than 5 feet (1.5 m) in total length. A tee fitting or equivalent method shall provide two horizontal openings to the radon collection. The tee fitting shall be designed to prevent clogging of the radon collection path. Alternately the soil gas collection shall be by approved radon collection mats or an equivalent approved method.						
9 R	11.902.3.1.3	11.902.3.1.3 Soil gas entry routes. Openings in slabs, soil-gas retarders, and joints such as, but not limited to, plumbing, ground water control systems, soil-gas vent pipes, piping and structural supports, shall be sealed against air leakage at the penetrations. The sealant shall be a polyurethane caulk, expanding foam or other approved method. Foundation walls shall comply with Section 103.2.3 of the IRC. Sumps shall be sealed in accordance with Section 103.2.2 of the IRC. Sump pits and sump lids intended for ground water control shall not be connected to the sub-slab soil-gas exhaust system.						
9 R	11.902.3.1.4	11.902.3.1.4 Soil gas vent. A gas-tight pipe vent shall extend from the soil gas permeable layer through the roof. The vent pipe size shall not be reduced at any location as it goes from gas collection to the roof. Exposed and visible interior vent pipes shall be identified with not less than one label reading "Radon Reduction System" on each floor and in habitable attics.						
9 R	11.902.3.1.5	11.902.3.1.5 Vent pipe diameter. The minimum vent pipe diameter shall be as specified in Table 11.902.3.1.5.						
9 R	11.902.3.1.6	11.902.3.1.6 Multiple vented areas. In dwellings where interior footings or other barriers separate the soil-gas permeable layer, each area shall be fitted with an individual vent pipe. Vent pipes shall connect to a single vent that terminates above the roof or each individual vent pipe shall terminate separately above the roof.						
9 R	11.902.3.1.7	11.902.3.1.7 Fan. Each sub-slab soil-gas exhaust system shall include a fan, or dedicated space for the post-construction installation of a fan. The electrical supply for the fan shall be located within 6 feet (1.8 m) of the fan. Fan is not required to be on a dedicated circuit.						
9 RF	11.902.3.2	11.902.3.2 Radon testing. Radon testing is mandatory for Zone 1.						
9 RF		Exceptions:						
9 RF		(2) Testing is not mandatory where the occupied space is located above an unenclosed open space.				<input checked="" type="checkbox"/>		
9 F	(1)	Testing specifications. Testing is performance as specified in (a) through (j). Testing of a representative sample shall be permitted for multifamily buildings only.	8	0	0	<input checked="" type="checkbox"/>	None	
9 F	(a)	Testing is performed after the residence passes its airtightness test.						
9 F	(b)	Testing is performed after the radon control system installation is complete. If the system has an active fan, the residence shall be tested with the fan operating.						
9 F	(c)	Testing is performed at the lowest level within a dwelling unit which will be occupied, even if the space is not finished.						
9 F	(d)	Testing is not performed in a closet, hallway, stairway, laundry room, furnace room, kitchen, or bathroom.						
9 F	(e)	Testing is performed with a commercially available test kit or with a continuous radon monitor that can be calibrated. Testing shall be in accordance with the testing device manufacturer's instructions.						
9 F	(f)	Testing shall be performed by the builder, a registered design professional, or an approved third party.						
9 F	(g)	Testing shall extend at least 48 hours or to the minimum specified by the manufacturer, which ever is longer.						
9 F	(h)	Written radon test results shall be provided by the test lab or testing party. Written test results shall be included with construction documents.						
9 F	(i)	An additional pre-paid test kit shall be provided for the homeowner to use when they choose. The test kit shall include mailing or emailing the results from the testing lab to the homeowner.						
9 F	(j)	Where the radon test result is 4 pCi/L or greater, the fan for the radon vent pipe shall be installed.						
9 F	(2)	Testing results. A radon test done in accordance with 11.902.3 and completed before occupancy receives a result of 2 pCi/L or less.	6	0	0		None	
9 RF	11.902.4	11.902.4 HVAC system protection. One of the following HVAC system protection measures is performed.	3	0	0	<input checked="" type="checkbox"/>	None	
9 R	(1)	HVAC supply registers (boots), return grilles, and rough-ins are covered during construction activities to prevent dust and other pollutants from entering the system.				<input checked="" type="checkbox"/>	None	
9 R	(2)	Prior to owner occupancy, HVAC supply registers (boots), return grilles, and duct terminations are inspected and vacuumed. In addition, the coils are inspected and cleaned and the filter is replaced if necessary.				<input checked="" type="checkbox"/>	None	
9 R	(3)	If HVAC systems are to be operated, during construction, all return grilles have a temporary MERV 8 or higher filter installed in a manner ensuring no leakage around the filter.				<input checked="" type="checkbox"/>	None	
9 RF	11.902.5	11.902.5 Central vacuum systems. Central vacuum system is installed and vented to the outside.	3	0	0	<input checked="" type="checkbox"/>	None	
9 P R	11.902.6	11.902.6 Living space contaminants. The living space is sealed in accordance with Section 11.701.4.3.1 to prevent unwanted contaminants.				<input checked="" type="checkbox"/>	None	
9 P R								
9 P RF	11.903	MOISTURE MANAGEMENT: VAPOR, RAINWATER, PLUMBING, HVAC						
9 R	11.903.0	11.903.0 Intent. Moisture and moisture effects are controlled.						
9 R	11.903.1	11.903.1 Plumbing. Plumbing is in accordance with one of the following.						
9 R	(1)	Cold water pipes in unconditioned spaces are insulated to a minimum of R-4 with pipe insulation or other covering that adequately prevents condensation.	2					
9 R	(2)	Plumbing is not installed in unconditioned spaces.	5					
9 RF	11.903.2	11.903.2 Duct insulation. Ducts are in accordance with one of the following.						
9 RF	(1)	All HVAC ducts, plenums, and trunks are located in conditioned space.	1					
9 RF	(2)	All HVAC ducts, plenums, and trunks are in conditioned space. All HVAC ducts are insulated to a minimum of R4.	3					
9 F	11.903.3	11.903.3 Relative humidity. In climate zones 1A, 2A, 3A, 4A, and 5A, equipment is installed to	7	0	0		None	

9	F	maintain relative humidity (RH) at or below 60 percent using one of the following:						
9	F	(1) additional dehumidification systems						
9	F	(2) central HVAC system equipped with additional controls to operate in dehumidification mode						
9	F							
9	RF	<b>11.904 INDOOR AIR QUALITY</b>						
9								
9		<b>11.904</b>	<b>11.904.0 Intent.</b> IAQ is protected by best practices to control ventilation, moisture, pollutant sources and sanitation.					
9	R	<b>11.904.1</b>	<b>11.904.1 Indoor Air Quality (IAQ) During Construction.</b> Wood is dry before close-in (11.602.1.7.1(3)), materials comply with emission criteria (11.901.4-11.901.11), sources of water infiltration or condensation observed during construction have been eliminated, accessible interior surfaces are dry and free of visible suspect growth (per ASTM D7338-10 section 6.3), and water damage (per ASTM D7338-10 section 7.4.3).	2	0	0		None
9	F	<b>11.904.2</b>	<b>11.904.2 Indoor Air Quality (IAQ) Post Completion.</b> Verify there are no moisture, mold, and dust issues per 11.602.1.7.1(3), 11.901.4-11.901.11, ASTM D7338 Section 6.3, and ASTM D7338 Section 7.4.3.	3	0	0		None
9	P	<b>11.904.3</b>	<b>11.904.3 Microbial growth &amp; moisture inspection and remediation.</b> A visual inspection is performed to confirm the following:					
9	P	(1)	Verify that no visible signs of discoloration and microbial growth on ceilings, walls or floors, or other building assemblies Or if minor microbial growth is observed (less than within a total area of 25 square feet) in homes or multifamily buildings, reference EPA Document 402-K-02-003 (A Brief Guide to Mold, Moisture, and Your Home) for guidance on how to properly remediate the issue. If microbial growth is observed, on a larger scale in homes or multifamily buildings (greater than 25 sq ft), reference EPA document 402.4-01-001 (Mold Remediation in Schools and Commercial Buildings) for guidance on how to properly remediate the issue.					None
9	P	(2)	Verify that there are no visible signs of water damage or pooling. If signs of water damage or pooling are observed, verify that the source of the leak has been repaired, and that damaged materials are either properly dried or replaced as needed.					None
9	RF	<b>11.905 INNOVATIVE PRACTICES</b>						
9	F	<b>11.905.1</b>	<b>11.905.1 Humidity monitoring system.</b> A humidity monitoring system is installed with a mobile base unit that displays readings of temperature and relative humidity. The system has a minimum of two remote sensor units. One remote sensor unit is placed permanently inside the conditioned space in a central location, excluding attachment to exterior walls, and another remote sensor unit is placed permanently outside of the conditioned space.	2	0	0		None
9	F	<b>11.905.2</b>	<b>11.905.2 Kitchen exhaust.</b> A kitchen exhaust unit(s) that equals or exceeds 400 cfm (189 L/s) is installed, and makeup air is provided.	2	0	0		None
9	F	<b>11.905.3</b>	<b>11.905.3 Enhanced air filtration.</b> Meet all of the following.	2	0	0		
9	F	(1)	Design for and install a secondary filter rack space for activated carbon filters.					None
9	F	(2)	Provide the manufacturer's recommended filter maintenance schedule to the homeowner or building manager.					None
9	F	<b>11.905.4</b>	<b>11.905.4 Sound barrier.</b> Provide room-to-room privacy between bedrooms and adjacent living spaces within dwelling units or homes by achieving an articulation index (AI) between 0 and 0.15 per the criteria below. <b>Articulation Index 0 to 0.05 = STC greater than 55 (NIC greater than 47)</b> <b>Articulation Index 0.05 to 0.15 = STC 52 to 55 (NIC 44 to 47)</b>	1 SF / 4 MF	0	0		None
9	F	<b>11.905.5</b>	<b>11.905.5 Evaporative coil mold prevention.</b> For buildings with a mechanical system for cooling, ultraviolet lamps are installed on the cooling coils and drain pans of the mechanical system supplies. Lamps produce ultraviolet radiation at a wavelength of 254 nm so as not to generate ozone. Lamps have ballasts housed in a NEMA-rated enclosure.	2	0	0		None
9	F	<b>11.905.6</b>	<b>11.905.6 Isolation of areas to be remodeled.</b> To protect unrenovated spaces, meet one of the following:	3 max	0	0		None
9	R	(1)	Remodeled space is isolated from unrenovated space by masking of openings and hvac returns and providing strip doors.	1				
9	R	(2)	Remodeled space is isolated from unrenovated space by masking of openings and hvac returns, and providing strip doors and the space is negatively pressurized by ducting exhaust to the exterior.	3				
9	R	(3)	Remodeled space is isolated from unrenovated space by masking of openings and hvac returns, and providing strip doors and a dedicated HEPA filtration system is installed.	3				

11.1001 HOMEOWNER'S MANUAL AND TRAINING GUIDELINES FOR ONE- AND TWO-FAMILY DWELLINGS									
10	P	11.1001	11.1001.0 Intent. Information on the building's use, maintenance, and green components is provided.						
10	F	11.1001.1	11.1001.1 A homeowner's manual is provided and stored in a permanent location in the dwelling that includes the following, as available and applicable.	1	8	Max	0	0	
10	F		(Points awarded per two items. Points awarded for non-mandatory items.)						
10	F	(1)	A National Green Building Standard certificate with weblink and completion document.	N/A					None
10	F	(2)	List of green building features (can include the national green building checklist).	N/A					None
10	F	(3)	Product manufacturer's manuals or product data sheet for newly installed major equipment, fixtures, and appliances including product model numbers and serial numbers. If product data sheet is in the building owners' manual, manufacturer's manual may be attached to the appliance in lieu of inclusion in the building owners' manual.	N/A					None
10	F	(4)	Maintenance checklist.						None
10	F	(5)	Information on local recycling and composting programs.						None
10	F	(6)	Information on available local utility programs that purchase a portion of energy from renewable energy providers.						None
10	F	(7)	Explanation of the benefits of using energy-efficient lighting systems [e.g., compact fluorescent light bulbs, light emitting diode (LED)] in high-usage areas.						None
10	F	(8)	A list of practices to conserve water and energy.						None
10	F	(9)	Information on the importance and operation of the home's fresh air ventilation system.	N/A					None
10	F	(10)	Local public transportation options.						None
10	F	(11)	A diagram showing the location of safety valves and controls for major building systems.						None
10	F	(12)	Where frost-protected shallow foundations are used, owner is informed of precautions including:						None
10	F	(a)	instructions to not remove or damage insulation when modifying landscaping.						
10	F	(b)	providing heat to the building as required by the ICC IRC or IBC.						
10	F	(c)	keeping base materials beneath and around the building free from moisture caused by broken water pipes or other water sources.						
10	F	(13)	A list of local service providers that offer regularly scheduled service and maintenance contracts to ensure proper performance of equipment and the structure (e.g., HVAC, water-heating equipment, sealants, caulks, gutter and downspout system, shower and/or tub surrounds, irrigation system).						None
10	F	(14)	A photo record of framing with utilities installed. Photos are taken prior to installing insulation, clearly labeled, and included as part of the building owners' manual.						None
10	F	(15)	List of common hazardous materials often used around the building and instructions for proper handling and disposal of these materials.						None
10	F	(16)	Information on organic pest control, fertilizers, deicers, and cleaning products.						None
10	F	(17)	Information on native landscape materials and/or those that have low water requirements.						None
10	F	(18)	Information on methods of maintaining the building's relative humidity in the range of 30 percent to 60 percent.						None
10	F	(19)	Instructions for inspecting the building for termite infestation.						None
10	F	(20)	Instructions for maintaining gutters and downspouts and importance of diverting water a minimum of 5 feet away from foundation.						None
10	F	(21)	A narrative detailing the importance of maintenance and operation in retaining the attributes of a green-built building.						None
10	F	(22)	Where stormwater management measures are installed on the lot, information on the location, purpose, and upkeep of these measures.						None
10	F	(23)	For buildings originally built before 1978, the EPA publications "Reducing Lead Hazards When Remodeling Your Home" and "Asbestos in Your Home: A Homeowner's Guide".						None
10	F	(24)	Explanation of and benefits from green cleaning in the home.						None
10	F	(25)	Retrofit energy calculator that provides baseline for future energy retrofits.						None
10	F	11.1001.2	11.1001.2 Training of initial homeowners. Initial homeowners are familiarized with the role of occupants in achieving green goals. Training is provided to the responsible party(ies) regarding equipment operation and maintenance, control systems, and occupant actions that will improve the environmental performance of the building. These include:	N/A	8		0	0	None
10	F	(1)	HVAC filters.						
10	F	(2)	Thermostat operation and programming.						
10	F	(3)	Lighting controls.						
10	F	(4)	Appliances operation.						
10	F	(5)	Water heater settings and hot water use.						
10	F	(6)	Fan controls.						
10	F	(7)	Recycling and composting practices.						
10	F	(8)	Whole-dwelling mechanical ventilation systems						
11.1002 CONSTRUCTION, OPERATION, AND MAINTENANCE MANUALS AND TRAINING FOR MULTI-UNIT BUILDINGS									
10	P	11.1002.0	11.1002.0 Intent. Manuals are provided to the responsible parties (owner, management, tenant, and/or maintenance team) regarding the construction, operation, and maintenance of the building. Paper or digital format manuals are to include information regarding those aspects of the building's construction, maintenance, and operation that are within the area of responsibilities of the respective recipient. One or more responsible parties are to receive a copy of all documentation for archival purposes.						
10	F	11.1002.1	11.1002.1 Building construction manual. A building construction manual, including five or more of the following, is compiled and distributed in accordance with Section 11.1002.0.	1	1		1		
10	F		(Points awarded per two items. Points awarded for non-mandatory items.)						
10	F	(1)	A narrative detailing the importance of constructing a green building, including a list of green building attributes included in the building. This narrative is included in all responsible parties' manuals.	Mandatory					None
10	F	(2)	A local green building program certificate as well as a copy of the National Green Building Standard™, as adopted by the Adopting Entity, and the individual measures achieved by the building.	Mandatory					None
10	F	(3)	Warranty, operation, and maintenance instructions for all equipment, fixtures, appliances, and finishes.	Mandatory					None
10	F	(4)	Record drawings of the building.						None
10	F	(5)	A record drawing of the site including stormwater management plans, utility lines, landscaping with common name and genus/species of plantings.						None
10	F	(6)	A diagram showing the location of safety valves and controls for major building systems.						None
10	F	(7)	A list of the type and wattage of light bulbs installed in light fixtures.						None
10	F	(8)	A photo record of framing with utilities installed. Photos are taken prior to installing insulation and clearly labeled.						None
10	F	11.1002.2	11.1002.2 Operations manual. Operations manuals are created and distributed to the responsible parties in accordance with Section 11.1002.0. Between all of the operation manuals, five or more of the following options are included.	1	2		2		
10	F		(Points awarded per two items. Points awarded for non-mandatory items.)						
10	F	(1)	A narrative detailing the importance of operating and living in a green building. This narrative is included in all responsible parties' manuals.	Mandatory					None
10	F	(2)	A list of practices to conserve water and energy (e.g., turning off lights when not in use, switching the rotation of ceiling fans in changing seasons, purchasing ENERGY STAR appliances and electronics).	Mandatory					None
10	F	(3)	Information on methods of maintaining the building's relative humidity in the range of 30 percent to 60 percent.						None
10	F	(4)	Information on opportunities to purchase renewable energy from local utilities or national green power providers and information on utility and tax incentives for the installation of on-site renewable energy systems.						None
10	F	(5)	Information on local and on-site recycling and hazardous waste disposal programs and, if applicable, building recycling and hazardous waste handling and disposal procedures.						None
10	F	(6)	Local public transportation options.						None
10	F	(7)	Explanation of the benefits of using compact fluorescent light bulbs, LEDs, or other high-efficiency lighting.						None
10	F	(8)	Information on native landscape materials and/or those that have low water requirements.						None
10	F	(9)	Information on the radon mitigation system, where applicable.						None
10	F	(10)	A procedure for educating tenants in rental properties on the proper use, benefits, and maintenance of green building systems including a maintenance staff notification process for improperly functioning equipment.						None

10 P	F	(11)	Information on the importance and operation of the building's fresh air ventilation system.	Mandatory per 902.2.1					None	
10 P	F	11.1002.3	11.1002.3 Maintenance manual. Maintenance manuals are created and distributed to the responsible parties in accordance with Section 11.1002.0. Between all of the maintenance manuals, five or more of the following options are included.	1	2	2				
10 P	F		(Points awarded per two items. Points awarded for non-mandatory items.)							
10 P	F	(1)	A narrative detailing the importance of maintaining a green building. This narrative is included in all responsible parties' manuals.	Mandatory					None	
10 P	F	(2)	A list of local service providers that offer regularly scheduled service and maintenance contracts to ensure proper performance of equipment and the structure (e.g., HVAC, water-heating equipment, sealants, caulks, gutter and downspout system, shower and/or tub surrounds, irrigation system).						None	
10 P	F	(3)	User-friendly maintenance checklist that includes:						None	
10 P	F	(a)	HVAC filters							
10 P	F	(b)	thermostat operation and programming							
10 P	F	(c)	lighting controls							
10 P	F	(d)	appliances and settings							
10 P	F	(e)	water heater settings							
10 P	F	(f)	fan controls							
10 P	F	(4)	List of common hazardous materials often used around the building and instructions for proper handling and disposal of these materials.						None	
10 P	F	(5)	Information on organic pest control, fertilizers, deicers, and cleaning products.						None	
10 P	F	(6)	Instructions for maintaining gutters and downspouts and the importance of diverting water a minimum of 5 feet away from foundation.						None	
10 P	F	(7)	Instructions for inspecting the building for termite infestation.						None	
10 P	F	(8)	A procedure for rental tenant occupancy turnover that preserves the green features.						None	
10 P	F	(9)	An outline of a formal green building training program for maintenance staff.						None	
10 P	F	(10)	A green cleaning plan which includes guidance on sustainable cleaning products.						None	
10 P	F	(11)	A maintenance plan for active recreation and play spaces (e.g., playgrounds, ground markings, exercise equipment).						None	
10 P	F	11.1002.4	11.1002.4 Training of building owners. Building owners are familiarized with the role of occupants in achieving green goals. On-site training is provided to the responsible party(ies) regarding newly installed equipment operation and maintenance, control systems, and occupant actions that will improve the environmental performance of the building. These include:	Mandatory	8	8			None	
10 P	F	(1)	HVAC filters							
10 P	F	(2)	thermostat operation and programming							
10 P	F	(3)	lighting controls							
10 P	F	(4)	appliances operation							
10 P	F	(5)	water heater settings and hot water use							
10 P	F	(6)	fan controls							
10 P	F	(7)	recycling and composting practices							
10 P	F	(8)	Whole-dwelling mechanical ventilation system							
10 P	F	11.1002.5	11.1002.5 Multifamily occupant manual. An occupant manual is compiled and distributed in accordance with Section 1002.0. [Points awarded for non-mandatory items.]	1 per 2 items	0	0				
10 P	F	(1)	NGBS certificate	Mandatory					None	
10 P	F	(2)	List of green building features	Mandatory					None	
10 P	F	(3)	Operations manuals for all appliances and occupant operated equipment including lighting and ventilation controls, thermostats, etc.	Mandatory					None	
10 P	F	(4)	Information on recycling and composting programs						None	
10 P	F	(5)	Information on purchasing renewable energy from utility						None	
10 P	F	(6)	Information on energy efficient replacement lamps						None	
10 P	F	(7)	List of practices to save water and energy						None	
10 P	F	(8)	Local public transportation options						None	
10 P	F	(9)	Explanation of benefits of green cleaning						None	
10 P	F	11.1002.6	11.1002.6 Training of multifamily occupants. Prepare a training outline, video or website that familiarizes occupants with their role in maintaining the green goals of the project. Include all equipment that the occupant(s) is expected to operate including but not limited.	1 per 2 items	0	0				
10 P	F	(1)	Lighting controls						None	
10 P	F	(2)	Ventilation controls						None	
10 P	F	(3)	Thermostat operation and programming						None	
10 P	F	(4)	Appliances operation						None	
10 P	F	(5)	Recycling and composting						None	
10 P	F	(6)	HVAC filters						None	
10 P	F	(7)	Water heater setting and hot water use						None	
10 P	RF	<b>11.1003 PUBLIC EDUCATION</b>								
10 P	F	11.1003.0	11.1003.0 Intent. Increase public awareness of the National Green Building Standard and projects constructed in accordance with National Green Building Standard to help increase demand for high-performance homes.							
10 P	RF	11.1003.1	11.1003.1 Public Education. One or more of the following is implemented:	2 Max	0	0				
10 R	F	(1)	Signage. Signs showing the project is designed and built in accordance with the National Green Building Standard are posted on the construction site.	1					None	
10 P	F	(2)	Certification Plaques. National Green Building Standard certification plaques with rating level attained are placed in a conspicuous location near the utility area of the home or, in a conspicuous location near the main entrance of a multifamily building.	1					None	
10 R	F	(3)	Education. A URL for the National Green Building Standard is included on site signage, builder website (or property website for multifamily buildings), and marketing materials for homes certified under the National Green Building Standard.	1					None	
10 P	RF	<b>11.1005 INNOVATIVE PRACTICES</b>								
10 P	F	11.1005.1	11.1005.1 Appraisals. One or more of the following is implemented:							
10 P	F	(1)	Energy rating or projected usage data is posted in an appropriate location in the home, or public posting so that an appraiser can access the energy data for an energy efficiency property valuation.	2	0	0			None	
10 P	F	(2)	An Appraisal Institute Form 820.05 "Residential Green and Energy Addendum" or Form 821 "Commercial Green and energy Efficient Addendum" that consider NGBS, LEED, ENERGY STAR certifications and equivalent programs, is completed for the appraiser by a qualified professional or builder to use in performing the valuation of the property.	2	0	0			None	
10 P	F	(3)	NGBS certification information or one of the Appraisal Institute Forms cited in (2) above is uploaded to a multiple listing service (MLS) or equivalent database so that appraisers can access it to compare property valuations.	2	2	2			Home Innovation makes key certification details available, but MLS organizations need to take affirmative action to ensure data is received and made publicly available. Contact us for more details.	

# **Tab G:**

Zoning Certification Letter (MANDATORY)

# Zoning Certification

**DATE:** February 3, 2026

**TO:** Virginia Housing  
601 South Belvidere Street  
Richmond, VA 23220

**RE:** ZONING CERTIFICATION

Name of Development: Powhatan  
Name of Owner/Applicant: Powhatan Apartments James City LLC  
Name of Seller/Current Owner: Powhatan Limited Partnership

The above-referenced Owner/Applicant has asked this office to complete this form letter regarding the zoning of the proposed Development (more fully described below). This certification is rendered solely to confirm proper zoning for the site of the Development. It is understood that this letter will be used by the Virginia Housing Development Authority solely to determine whether the Development qualifies for points available under VHDA's Qualified Allocation Plan for housing tax credit.

**DEVELOPMENT DESCRIPTION:**

**Development Address:**

226 Burton Woods Drive  
Williamsburg, VA 23188

**Leal Description:**

That certain parcel of land, in Berkley District, James City County, Virginia, containing 4.017 acres more or less, shown on plat of survey by Small Engineering, Inc., a copy of which is attached and according to which plat such parcel is described as follows:  
BEGINNING at a point on the eastern right of way line of Burton Wood Drive (Phase I) which point is located approximately 472 feet south of SR 612 and 620 feet east of SR 614; then along a curve to the right having a radius of 451.81 feet a distance of 100.80 feet to a point; then S. 35o 44' 10" W. 237.28 feet to a point; then S. 54o 15' 10" E. 60.00 feet to a point; then N. 35o 44' 10" E. 237.28 feet to a point; then along a curve to the left having a radius of 391.81 feet a distance of 87.41 feet to a point; then S. 67o 02' 46" 60.00 feet to the beginning point. BEING a part of the same real estate conveyed to Heritage Builders, Inc., a Virginia corporation, by deed from J. Cory Mulligan and Olive C. Mulligan, husband and wife, dated June 13, 1972, recorded July 7, 1972, Clerk's Office, Circuit Court, James City County, Virginia in Deed Book 137, page 652.

**Proposed Improvements:**

Construction

New Construction:	# Units	_____	# Buildings	_____	Total Floor Area	_____
Adaptive Reuse	# Units	_____	# Buildings	_____	Total Floor Area	_____
Rehabilitation:	# Units	<u>48</u>	# Buildings	<u>6</u>	Total Floor Area	<u>36,120</u>

**Zoning Certification, cont'd**

**Current Zoning:** R-5, Multifamily Residential District allowing a density of 12\* units per acre, and the following other applicable conditions: Apartments units are a permitted use.

\*The existing density is non-conforming.

**Other Descriptive Information:**

Powhatan Apartments is a 48-unit, multifamily five building apartment complex.

**LOCAL CERTIFICATION:**

Check one of the following a appropriate:



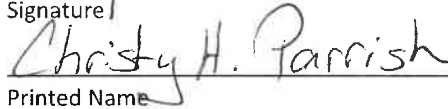
The zoning for the proposed development described above is proper for the proposed residential development. To the best of my knowledge, there are presently no zoning violations outstanding on this property. No further zoning approvals and/or special use permits are required.



The development described above is approved for non-conforming use. To the best of my knowledge, there are no zoning violations outstanding on this property, and no further zoning approvals and/or special use permits are required.



Signature



Printed Name

James City County Zoning Administrator

Title of Local Official or Civil Engineer

(757) 253-6755

Phone

March 5, 2026

Date

**NOTES TO LOCALITY:**

1. Return this certification to the developer for inclusion in the tax credit application package.
2. Any change in this form may result in disqualification of the application.
3. If you have any questions, please contact the Tax Credit Allocation Department at

[taxcreditapps@virginiahousing.com](mailto:taxcreditapps@virginiahousing.com).

# **Tab H:**

Attorney's Opinion (MANDATORY)

# WILLIAMS MULLEN

Direct Dial: 804.420.6915  
adomson@williamsmullen.com

March 12, 2026

TO: Virginia Housing  
601 South Belvidere Street  
Richmond, Virginia 23220

RE: 2026 Tax Credit Reservation Request (competitive 70% present value credits)

Name of Development: Powhatan Apartments  
Name of Owner: Powhatan Apartments James City LLC

Dear Virginia Housing:

This undersigned firm represents the above-referenced Owner as its counsel. It has received a copy of and has reviewed the completed application package dated March 12, 2026 (of which this opinion is a part) (the “**Application**”) submitted to you for the purpose of requesting, in connection with the captioned Development, a reservation of low-income housing tax credits (“**Credits**”) available under Section 42 of the Internal Revenue Code of 1986, as amended (the “**Code**”). It has also reviewed Section 42 of the Code, the regulations issued pursuant thereto and such other binding authority as it believes to be applicable to the issuance hereof (the regulations and binding authority hereinafter collectively referred to as the “**Regulations**”).

Based upon the foregoing reviews and upon due investigation of such matters as it deems necessary in order to render this opinion, but without expressing any opinion as to either the reasonableness of the estimated or projected figures or the veracity or accuracy of the factual representations set forth in the Application, the undersigned is of the opinion that:

1. It is more likely than not that the inclusion in eligible basis of the Development of such cost items or portions thereof, as set forth in Hard Costs and Owners Costs section of the Application form, complies with all applicable requirements of the Code and Regulations.
2. The calculations (a) of the Maximum Allowable Credit available under the Code with respect to the Development and (b) of the Estimated Qualified Basis of each building in the Development comply with all applicable requirements of the Code and regulations, including the selection of credit type implicit in such calculations.
3. The appropriate type(s) of allocation(s) have been requested in the Reservation Request Information section in the Application form.
4. The information set forth in the Unit Details section of the Application form as to proposed rents exceeds the Code rent restrictions; however, the Development will satisfy all applicable requirements of the Code and Regulations due to subsidies such that no tenant will pay rents in excess of what is dictated by the Code and Regulations.
5. The site of the captioned Development is controlled by the Owner, as identified in the Site Control section of the Application, for a period of not less than four (4) months beyond the application deadline.

6. Based solely upon my review of (i) the Applicant's operating agreement; (ii) any certifications, resolutions, or consents provided to me by the Applicant; and (iii) such operating agreements, partnership agreements, bylaws, or other organizational documents of the Applicant's Principals which I deemed necessary to issue this Opinion (none of which are attached to this Opinion), the individuals identified on the list attached as Exhibit A are duly authorized to execute documents on behalf of the Applicant, to the best of my knowledge and belief.

7. It is more likely than not that the representations made under the Rehab Information section of the Application form as to the Development's compliance with or exception to the Code's minimum expenditure requirements for rehabilitation projects are correct.

8. After reasonable investigation, the undersigned has no reason to believe that the representations made under the Rehab Information (Ten-Year Rule) section of the Application form as to the Development's compliance with or eligibility for exception to the ten-year "look-back rule" requirement of Code 42(d)(2)(B) are not correct.

Finally, the undersigned is of the opinion that, if all information and representations contained in the Application and all current law were to remain unchanged, upon compliance by the Owner with the requirements of Code Section 42(h)(1)(E), the Owner would be eligible under the applicable provisions of the Code and the Regulations to an allocation of Credits in the amount(s) requested in the Application.

This opinion is rendered solely for the purpose of inducing the Virginia Housing Development Authority ("**Virginia Housing**") to issue a reservation of Credits to the Owner. Accordingly, it may be relied upon only by Virginia Housing and may not be relied upon by any other party for any other purpose.

**This opinion was not prepared in accordance with the requirements of Treasury Department Circular No. 230. Accordingly, it may not be relied upon for the purpose of avoiding U.S. Federal tax penalties or to support the promotion or marketing of the transaction or matters addressed herein.**

Williams Mullen



By: \_\_\_\_\_  
Its: Shareholder

EXHIBIT A  
TO  
ATTORNEY'S OPINION LETTER

Based solely upon my review of (i) the Applicant's operating agreement; (ii) any certifications, resolutions, or consents provided to me by the Applicant; and (iii) such operating agreements, partnership agreements, bylaws, or other organizational documents of the Applicant's Principals which I deemed necessary to issue this Opinion (*none of which are attached to this Opinion or included within this Exhibit*), the individuals identified below are duly authorized to execute documents on behalf of the Applicant, to the best of my knowledge and belief.

	NAME	TITLE
1	Adam J. Stockmaster	Manager of AS Squared, LLC, manager of TMG I LLC, manager of Powhatan Apartments James City MM LLC, sole member/manager of Powhatan Apartments James City LLC

# WILLIAMS MULLEN

Direct Dial: 804.420.6915  
adomson@williamsmullen.com

~~[Insert Date]~~  
March 12, 2026

TO: Virginia Housing  
601 South Belvidere Street  
Richmond, Virginia 23220

RE: 2026 Tax Credit Reservation Request (competitive 70% present value credits)

Name of Development: Powhatan Apartments  
Name of Owner: Powhatan Apartments James City LLC

Dear Virginia Housing:

This undersigned firm represents the above-referenced Owner as its counsel. It has received a copy of and has reviewed the completed application package dated ~~\_\_\_\_\_~~ March 12, 2026 (of which this opinion is a part) (the “**Application**”) submitted to you for the purpose of requesting, in connection with the captioned Development, a reservation of low-income housing tax credits (“**Credits**”) available under Section 42 of the Internal Revenue Code of 1986, as amended (the “**Code**”). It has also reviewed Section 42 of the Code, the regulations issued pursuant thereto and such other binding authority as it believes to be applicable to the issuance hereof (the regulations and binding authority hereinafter collectively referred to as the “**Regulations**”).

Based upon the foregoing reviews and upon due investigation of such matters as it deems necessary in order to render this opinion, but without expressing any opinion as to either the reasonableness of the estimated or projected figures or the veracity or accuracy of the factual representations set forth in the Application, the undersigned is of the opinion that:

1. It is more likely than not that the inclusion in eligible basis of the Development of such cost items or portions thereof, as set forth in Hard Costs and Owners Costs section of the Application form, complies with all applicable requirements of the Code and Regulations.

~~2.~~ ~~[Select One]~~

2. The calculations (a) of the Maximum Allowable Credit available under the Code with respect to the Development and (b) of the Estimated Qualified Basis of each building in the Development comply with all applicable requirements of the Code and regulations, including the selection of credit type implicit in such calculations.

**OR**

~~Assuming that you designate the buildings in the Development as being in a difficult development area pursuant to Code Section 42(d)(5)(B)(v), the calculations (a) of the Maximum Allowable Credit available under the Code with respect to the Development and (b) of the Estimated Qualified Basis of each building in the Development comply with all applicable requirements of the Code and regulations, including the selection of credit type implicit in such calculations.~~

3. The appropriate type(s) of allocation(s) have been requested in the Reservation Request Information section in the Application form.

~~4. [Select One]~~

~~4. The information set forth in the Unit Details section of the Application form as to proposed rents satisfies all applicable requirements of the Code and Regulations.~~

~~OR~~

~~The information set forth in the Unit Details section of the Application form as to proposed rents exceeds the Code rent restrictions; however, the Development will satisfy all applicable requirements of the Code and Regulations due to subsidies such that no tenant will pay rents in excess of what is dictated by the Code and Regulations.~~

5. The site of the captioned Development is controlled by the Owner, as identified in the Site Control section of the Application, for a period of not less than four (4) months beyond the application deadline.

6. Based solely upon my review of (i) the Applicant's ~~operating agreement/ partnership agreement~~; (ii) any certifications, resolutions, or consents provided to me by the Applicant; and (iii) such operating agreements, partnership agreements, bylaws, or other organizational documents of the Applicant's Principals which I deemed necessary to issue this Opinion (none of which are attached to this Opinion), the individuals identified on the list attached as Exhibit A are duly authorized to execute documents on behalf of the Applicant, to the best of my knowledge and belief.

~~7. [Delete if inapplicable] The type of the nonprofit organization involved in the Development is an organization described in Code Section 501(c)(3) or 501(c)(4) and exempt from taxation under Code Section 501(a), whose purposes include the fostering of low income housing.~~

~~8. [Delete if inapplicable] The nonprofit organizations' ownership interest in the development is as described in the Nonprofit Involvement section of the Application form.~~

~~97. [Delete if inapplicable] It is more likely than not that the representations made under the Rehab Information section of the Application form as to the Development's compliance with or exception to the Code's minimum expenditure requirements for rehabilitation projects are correct.~~

~~108. [Delete if inapplicable] After reasonable investigation, the undersigned has no reason to believe that the representations made under the Rehab Information (Ten-Year Rule) section of the Application form as to the Development's compliance with or eligibility for exception to the ten-year "look-back rule" requirement of Code 42(d)(2)(B) are not correct.~~

Finally, the undersigned is of the opinion that, if all information and representations contained in the Application and all current law were to remain unchanged, upon compliance by the Owner with the requirements of Code Section 42(h)(1)(E), the Owner would be eligible under the applicable provisions of the Code and the Regulations to an allocation of Credits in the amount(s) requested in the Application.

This opinion is rendered solely for the purpose of inducing the Virginia Housing Development Authority ("**Virginia Housing**") to issue a reservation of Credits to the Owner. Accordingly, it may be relied upon only by Virginia Housing and may not be relied upon by any other party for any other purpose.

**This opinion was not prepared in accordance with the requirements of Treasury Department Circular No. 230. Accordingly, it may not be relied upon for the purpose of avoiding U.S. Federal tax penalties or to support the promotion or marketing of the transaction or matters addressed herein.**

Williams Mullen

(Add)

*Allison Damsen*

By: \_\_\_\_\_

Its: Shareholder

EXHIBIT A  
TO  
ATTORNEY'S OPINION LETTER

Based solely upon my review of (i) the Applicant's ~~{operating agreement/  
partnership agreement}~~; (ii) any certifications, resolutions, or consents provided to me by the Applicant; and (iii) such operating agreements, partnership agreements, bylaws, or other organizational documents of the Applicant's Principals which I deemed necessary to issue this Opinion (*none of which are attached to this Opinion or included within this Exhibit*), the individuals identified below are duly authorized to execute documents on behalf of the Applicant, to the best of my knowledge and belief.

	NAME	TITLE
1	<a href="#">Adam J. Stockmaster</a>	<a href="#">Manager of AS Squared, LLC, manager of TMG I LLC, manager of Powhatan Apartments James City MM LLC, sole member/manager of Powhatan Apartments James City LLC</a>
<del>2</del>		
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# Tab I:

## Nonprofit Questionnaire (MANDATORY for points or pool)

NOTE: The following documents need not be submitted unless requested by Virginia Housing:

- Nonprofit Articles of Incorporation
- IRS Documentation of Nonprofit Status
- Joint Venture Agreement (if applicable)
- For-profit Consulting Agreement (if applicable)

**N/A**

# **Tab J:**

Relocation Plan and Unit Delivery Schedule  
(MANDATORY-Rehab)

# Powhatan Apartments Renovation and Relocation Plan

**February 19, 2026**

## PROJECT AND CONTACT INFORMATION

**Project:** Powhatan Apartments, 226 Walnut St, Burton Woods Drive, Williamsburg, VA 23188

**Owner:** Powhatan Apartments James City LLC  
c/o 1375 Piccard Drive, Suite 375, Rockville, MD 20850

Contact: Adam J. Stockmaster, [astockmaster@tmamgroup.com](mailto:astockmaster@tmamgroup.com), (240)863-0300

**Property Management:** TM Associates Management, Inc. 1375 Piccard Drive, Suite 375 Rockville, Maryland 20850

Contact: Denise Craft, [dcraft@tmamgroup.com](mailto:dcraft@tmamgroup.com), 240-683-0300

## REHABILITATION ACTIVITIES

Powhatan Apartments James City LLC intends to purchase the existing Powhatan Apartments, and a significant capital investment is planned. The planned acquisition of the property is scheduled to occur in April 2026.

This renovation plan relates to Powhatan Apartments. The property consists of 48 apartment units offering one-bedroom and two-bedroom units. The leasing office for Powhatan Apartments will remain where it is located. Existing community amenities include a community room space, with kitchen, for resident activities, as well as a secondary seating area with vending. The scope of work for rehabilitation includes, but is not limited to the following:

- Replacement of kitchen cabinets and countertops
- Replacement of bathroom vanities and toilets replacement of select tubs
- Replacement of water heaters and HVAC units
- Replacement of windows
- Upgrades to electrical and plumbing systems, including new lighting and ceiling fans
- Installation of new flooring in most units
- Replacement of appliances in most units and installation of dishwashers
- Increased attic insulation
- Site improvements, including new landscaping, replacement of select sidewalks and a new building entry

The new appliances and mechanical equipment will offer higher efficiency than what is currently being used at the property. Along with new windows and new insulation, the units will be significantly more energy efficient and should lead to lower utility bills for the resident.

**PROJECT SCHEDULE**

The rehabilitation work will be performed by a large general contractor with significant experience managing rehabilitation projects of this scope. The construction is intended to progress with exterior work being completed first, followed by interior work and finishes. This plan contemplates a construction start of June 1, 2027. The planned renovation work is expected to be materially complete by December 31, 2027, with the punch list work expected to be complete by March 2028. The schedule for construction activity will be updated regularly with sufficient notification to residents for work that needs to be completed in their apartment. Once the schedule is finalized, this plan will be updated and redistributed as needed. All the renovation work is intended to be completed around the existing residents, with the residents to remain in their unit, but both the community room and seating area will be available for the residents to enjoy while work is ongoing in their apartment should they choose to not remain in their apartment.

Start Renovation June 1, 2027, Substantially Complete Renovation by December 31, 2027 with all work anticipated to be completed by March 31, 2028. This schedule is subject to change and the residents will be notified of schedule changes as soon as possible.

**RESIDENT IMPACT**

The property management staff, and company will not change and the same experienced property manager, known for their professionalism and attentive service to the residents they serve. All the members of the management team will be tasked to keep the residents informed of changes to the renovation plans throughout the construction period. The proposed construction activity in each unit will be performed in such a fashion to limit resident inconveniences.

Resident furnishings and belongings will be moved as needed by the general contractor and subcontractors at the ownership’s expense. We ask that the residents please pack-up their small items and valuables with materials that property management will furnish. As needed, assistance can be provided for residents with special needs.

**RENTS AND RENTAL POLICIES FOLLOWING REHABILITATION**

Powhatan Apartments is being renovated using housing tax credit financing along with a new mortgage. With this source of financing, housing costs, including rent and an allowance for tenant-paid utilities, are restricted to be affordable to households that earn 60% of the Area Median Income (AMI) and below. Also, only households with incomes below 60% of the Area Median Income (as adjusted for household size) are eligible to live in the community.

These rent and income restriction are no different than what is currently in place for the property under the previous ownership, so it is expected that all existing residents at Powhatan Apartments will be income qualified. Property Management will annually certify the incomes of the residents and they will reach out to each of the existing residents to verify the income of the household.

Current income limits and the projected post-rehabilitation rents are shown in the attached Tenant Selection Plan for the property. Due to the project based rental subsidy contract on most of the units, the resident paid portion of the rents is not expected to change for these units.

Residents will continue to be responsible for their own electrical costs, which includes heat, air conditioning, cooking, water heating, and lighting/general electric use. Residents are also responsible for any optional services desired, such as telephone, cable TV or internet service. Following completion of the renovation work, the water and sewer service will be individually sub metered and the resident will become responsible for this billing. Trash service will continue to be paid for by the ownership.

***Rent and Utility Changes Proposed***

	<b>Current Rents</b>	<b>Proposed Rents</b>
<b>2 Bedroom Units</b>	\$899/Month	\$1,550/Month

***Utility Allowance Changes Proposed***

	<b>Current UA</b>	<b>Proposed UA</b>
<b>2 Bedroom Units</b>	\$85/ Month	\$99/Month

### ***Permanent Relocation***

Existing residents are NOT expected to be permanently relocated as a result of the acquisition or rehabilitation of Powhatan Apartments. If a current resident is found to be over income or found to have been over income when the resident initially occupied their unit, they will be permanently relocated from Powhatan Apartments property. As the previous ownership of Powhatan Apartments was held to the same income verification requirements as the new ownership, we do not expect there to be any situation where a current resident will be found to not qualify for their apartment unit.

The site management team will provide Full Relocation Assistance as required in VH's Relocation Assistance Guidelines. Such assistance includes Advisory Services and Moving Cost Reimbursement to the extent a relocation is necessary to perform the planned renovation work.

### **OWNER'S RESPONSIBILITIES TO TENANTS**

Advisory Services will include:

- Provides referrals for tenants to replacement properties, and contacts said properties to request priority for persons being displaced.
- Provides tenants with written information and/or translation services in their native languages if necessary
- Provides appropriate counseling for tenants who are unable to read and understand notices
- Provides contact information for questions and access to phone or computer if needed to make contact.
- Provides transportation for tenants needing to look at other housing, especially those who are elderly or disabled
- Understand and anticipate the needs of families and the elderly and able to meet the special advisory services they may need
- Allow and make tenants aware that appointments can be scheduled outside of normal business hours if needed.

Moving Cost Reimbursement to displaced residents will be based on the following guidelines:

- The Federal Highway Administration's Fixed Residential Moving Cost Schedule (includes utility hook up costs) for Virginia is as follows:
    - 1 Room of Furniture-\$700
    - 2 Rooms of Furniture-\$900
    - 3 Rooms of Furniture-\$1,100
    - 4 Rooms of Furniture-\$1,300
- OR
- Based on tenant's actual reasonable moving and related expenses. Reimbursement of actual moving and related expenses is defined as either labor or equipment.
  - As needed, residents will receive assistance in packing and moving furniture and belongings.
  - Temporary storage units will be provided for convenience as well.

### ***Temporary Relocation***

All residents are scheduled to remain in their same apartment after renovations. All tenants will be able to reside in their units throughout the renovation, however 3 units will receive significant handicap upgrades that may necessitate a temporary relocation of the resident.

Residents temporarily relocated will be offered Moving Cost Reimbursement. Most residents that are temporarily relocated will endure no more than eight weeks of relocation. Residents will

receive assistance in packing and moving furniture and belongings, plus temporary storage units will be provided for convenience as well. Ownership will also provide the advisory services listed above. Any tenant that is displaced for a partial day will be offered access to amenities (day room, refreshments, meals, TV, etc.) during daytime hours, up to five days.

### ***Unit Delivery Schedule***

See attached for detailed Unit Delivery Schedule

### ***Tenant Notices***

The new ownership intends to provide thorough and well-documented communication with residents of relocation and renovation plans. Initial notices have already been provided by property management, and further notices will begin on the settlement date, beyond the earlier 120-day notice. The 120-day written notice will be addressed to tenants their current address and will include the following:

- Informs the tenant that due to renovation they are required to move from the development, why they are required to move and states the move date.
- States the contact person for advisory services, types of services that are offered and hours as well as giving the option to make a scheduled appointment outside of normal hours if needed.
- Generally describes the relocation payment(s) for which the tenant may be eligible, the basic conditions of eligibility and the procedures for obtaining the payment (see Moving Cost Reimbursement below). Eligibility for relocation assistance shall begin on the date that acquisition negotiations are initiated or actual acquisition, whichever occurs first.
- States the contact information of management company if tenant has any questions or would like to discuss the assistance determination

Further notice will be provided in writing at least 30-days in advance of work commencing in the resident apartment, unless there is a health/safety concern. Mailings will be prepared in advance so that they may be mailed as of the notice date. Mailings will be addressed to the tenant at his/her current address and will include the following information:

- Specific date by which the tenant is required to move, and the time moving services will arrive at unit;
- Responsibilities of the tenant pertaining to the move and contact information in order to request assistance with said responsibilities;
- The address to which the tenant will be relocated;
- If applicable, the date on which the move-in inspection will be completed.

Where a mold condition in the dwelling unit materially affects the health or safety of any tenant or authorized occupant, the owner may require the tenant to temporarily vacate the dwelling unit in order to perform remediation, in accordance with professional standards as defined in Code Section 55-248.4 for a period not to exceed 30 days. The landlord shall provide the tenant with either (i) a comparable dwelling unit, as selected by the landlord, at no expense or cost to the tenant, or (ii) a hotel room, at no expense or cost to the tenant. See Code Section 55-248.12:2. Notice to the tenant

Copies of all notices with tenant acknowledgement will be provided to VHDA as soon as possible.

This Renovation and Relocation Plan will be made available to residents upon request and will be posted in the leasing office in plain sight for tenant review. Copies of all notices, checks and other documents related to the relocation will be included in each tenant's file.

### ***Moving Cost Reimbursements***

Residents seeking reimbursement of actual moving expenses must provide documentation of the Tenant's Actual Reasonable Moving and Related Expenses, including bills, certified prices, appraisals or other evidence of expenses within 30-days of receiving same. The ownership's responsibilities with respect to Moving Cost Reimbursements are as follows:

- Owners must provide reasonable assistance necessary to complete and file tenants' claims for payment.
- Moving cost reimbursements shall be made upon receipt of billing documentation from the tenant.
- Owners must provide expedited return of security deposits or allow tenants to apply security deposits to the last month's rent.
- Owners must make advanced payments, if a tenant demonstrates the need, in order to avoid or reduce a hardship.
- If the owner disapproves all or part of a payment claimed or refuses to consider the claim on its merits because of untimely filing or other grounds, it shall promptly notify the claimant in writing of its determination, the basis for its determination and the procedures for appealing that determination.
- An owner shall not propose or request that a displaced tenant waive his or her rights or entitlements to relocation assistance and benefits.

### **OWNER'S RESPONSIBILITY TO VHDA**

A Final Moving Cost Reimbursement summary in rent roll format (by tenant, by unit) will be submitted to VHDA no later than 30-days after the last tenant is relocated. In addition, the ownership will provide a certification that the Owner has met the VHDA Moving Cost Reimbursement and Relocation Assistance Guidelines.

### **PLAN UPDATES**

This plan may be updated from time to time. Copies of the updated plan will be made available to residents affected by the project. This current plan was drafted in accordance with 2026 VHDA Relocation Assistance Guidelines.

Attachments:            Moving Cost Reimbursement Schedule  
                                 Tenant Notices of upcoming renovations  
                                 Tenant Selection Plan  
                                 Unit Delivery Schedule

### ***Powhatan Apartments-Moving Cost Reimbursement Schedule***

Note: This pre-determination of moving cost reimbursements assumes that no more than five residential units may need to be vacated on a volunteer basis. This pre-determination assumes that half of volunteers will move twice (in-and-out of their unit. To account for assumed vacancy at the start of the notice period, total moving costs are reduced by 20%. A contingency of \$100/unit is also added to the estimated costs.

#### ***Moving Cost Reimbursement***

Pre-Determination

- \$1,100 2 Bedroom Unit (3 rooms w/ furniture)

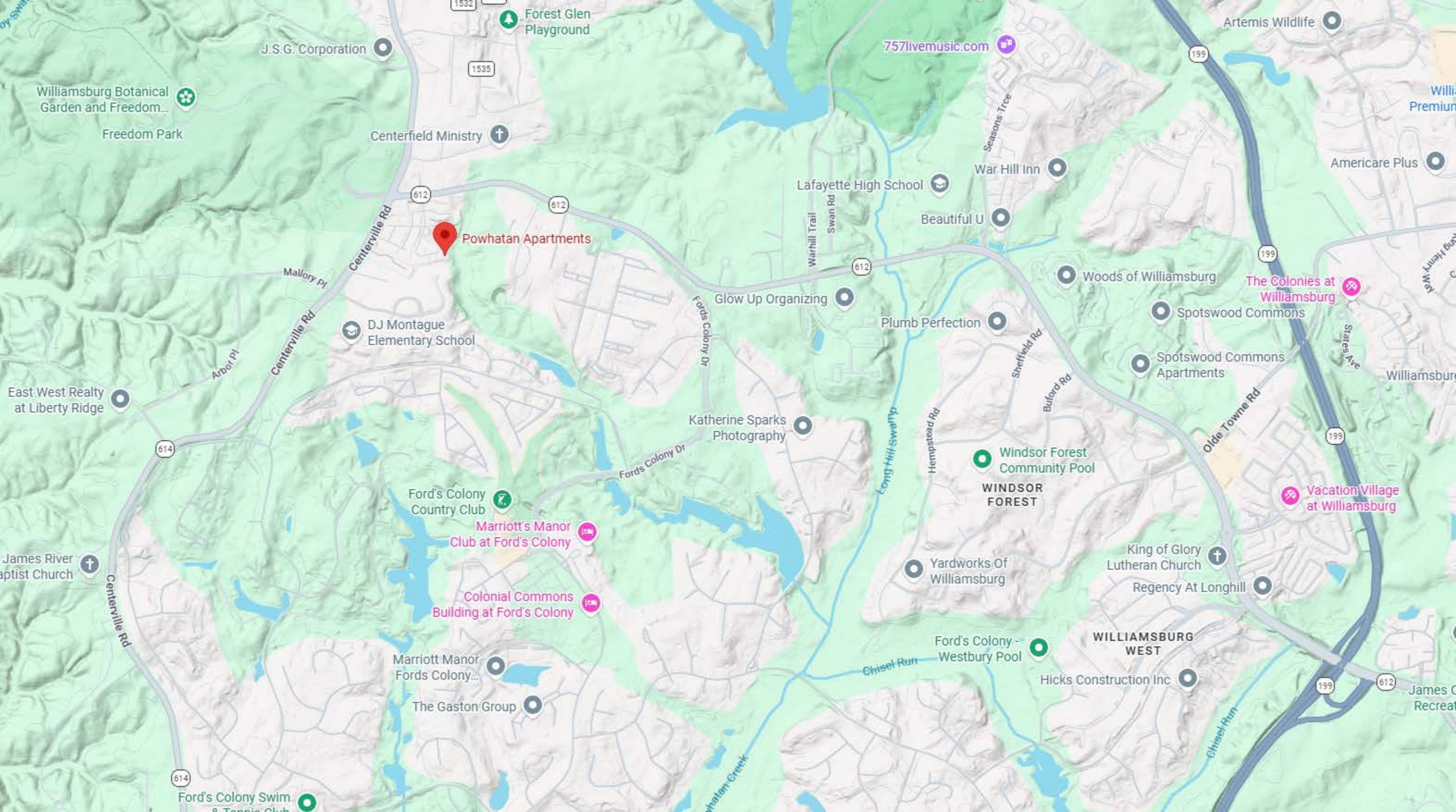


## Unit Delivery Schedule

Month	1	2	3	4	5	6	7	8	9
<b>SOW</b>	Exterior Demo	Exterior Finish, Mechanical System replacement	Interior Apartment and Community Building work	Interior Apartment and Community Building work	Interior Handicap Unit work, tenants displaced	Interior Handicap Unit work, tenants displaced	Interior Handicap Unit work, tenants displaced	Testing and Site Work	Punch List Items
<b>Move-Out</b>	0	0	0	0	3	3	0	0	0
<b>Move-In</b>	0	0	0	0	0	3	3	0	0

# Tab K:

Documentation of Development Location:



Powhatan Apartments

Ford's Colony Country Club

Marriott's Manor Club at Ford's Colony

Colonial Commons Building at Ford's Colony

Marriott Manor Ford's Colony...

The Gaston Group

Windsor Forest Community Pool

WINDSOR FOREST

Yardworks of Williamsburg

Ford's Colony - Westbury Pool

WILLIAMSBURG WEST

Hicks Construction Inc

DJ Montague Elementary School

Lafayette High School

Beautiful U

War Hill Inn

Glow Up Organizing

Plumb Perfection

Katherine Sparks Photography

Windsor Forest Community Pool

King of Glory Lutheran Church

Regency At Longhill

The Colonies at Williamsburg

Spotswood Commons

Spotswood Commons Apartments

Vacation Village at Williamsburg

Americare Plus

Artemis Wildlife

Williamsburg Botanical Garden and Freedom...

Freedom Park

J.S.G. Corporation

Forest Glen Playground

757livemusic.com

East West Realty at Liberty Ridge

James River Baptist Church

Ford's Colony Swim & Tennis Club

James C. Recreation

# **Tab K.1**

Revitalization Area Certification



## Revitalization Area

### **General Instructions**

To qualify for revitalization area points available under the QAP (13 VAC 180-60(E)(2)(c)), select one of the following and provide sufficient supporting documentation:

1. The development is located in either of the following, as defined by HUD: a Qualified Census Tract; or a Targeted Area, wherein 70% or more of the families have incomes which are  $\leq$  80% statewide median income [NOTE: these census tracts are included in the definition of Targeted Area for single-family lending purposes but do not include ACEDS].
2. The development is located in a redevelopment area, conservation area or rehabilitation district created by a city or county, pursuant to VA Code §36-1 et seq. Documentation must (a) demonstrate that area exists at the time of application; (b) accurately depict area boundaries; and (c) clearly show that the proposed development lies or will lie within those boundaries.
3. The development is located in a revitalization area designated by resolution adopted pursuant to the terms of VA Code § 36-55.30:2 for the purpose of enabling Virginia Housing to provide financing to either a mixed-income or mixed-income/mixed-use development. Documentation must include a resolution from the locality supporting the development's location within the revitalization area. Please contact Rental Housing development to obtain the appropriate form resolution.
4. The development is located in a Housing Rehabilitation Zone established through an ordinance created by a city, county or town pursuant to VA Code §36-55.64. Documentation must include a copy of the ordinance with support that the development lies within the Rehabilitation Zone.
5. The development is located in an opportunity zone designated by the Commonwealth pursuant to the Federal Tax Cuts and Jobs Act of 2017 (PL 115-97) and has a binding commitment of funding acceptable to Virginia Housing.
6. The development is located in a jurisdiction that confirms that the development, as proposed to be constructed or rehabilitated, will utilize new or existing housing as part of a community revitalization plan. Must use Virginia Housing's Community Revitalization Plan Form Letter.
7. The development is located on land owned by federally recognized or Virginia-recognized Tribal Nations located within the present-day external boundaries of the Commonwealth.



## Community Revitalization Plan Form Letter

### 13 VAC 180-60(E)(2)(c)(6)

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#### General Instructions:

1. The Community Revitalization Plan Form should be signed by any of the following individuals or authorized officers of any of the following offices within the jurisdiction where the Development will be located:
  - City Manager/County Executive
  - Office of Housing
  - Office of Planning
  - Office of Zoning
  - Economic Development Authority
  - Local Housing Authority
  - Other official or office deemed acceptable by Virginia Housing
2. Owner/Applicant should fill in all requested information on the form letter, except for the signature page:
  - 'Development Address' should correspond to I.A.2 on page 1 of the application and Zoning Certification.
  - 'Proposed Improvements' should correspond with I.B & D and III.A of the application and Zoning Certification.
3. Authorized signer should complete and execute the signature page.

If you have any questions, please contact the Tax Credit Allocation Department at: [taxcreditapps@virginiahousing.com](mailto:taxcreditapps@virginiahousing.com)

**Community Revitalization Plan Form Letter**  
**13 VAC 180-60(E)(2)(c)(6)**

**DATE:** March 3, 2026

**TO:** Virginia Housing  
601 South Belvidere Street  
Richmond, VA 23220

**RE:** Community Revitalization Plan Form

Name of Development: Powhatan

Name of Owner/Applicant: Powhatan Apartments James City LLC

Name of Seller/Current Owner: Powhatan Limited Partnership

**DEVELOPMENT DESCRIPTION:**

**Development Address:**

226 Burton Woods Drive, Williamsburg, VA 23188

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Proposed Improvements:**

New Construction:	# Units	<u>      </u>	# Buildings	<u>      </u>	Total Floor Area	<u>                    </u>
Adaptive Reuse	# Units	<u>      </u>	# Buildings	<u>      </u>	Total Floor Area	<u>                    </u>
Rehabilitation:	# Units	<u>48</u>	# Buildings	<u>6</u>	Total Floor Area	<u>36,120</u>

The Owner/Applicant listed above has asked this office to complete this form letter regarding the proposed Development described herein. This form letter will be used by Virginia Housing Development Authority for the sole purpose of determining whether the Development qualifies for points available under Virginia Housing's Qualified Allocation Plan for housing tax credits.

Accordingly, as indicated by my signature below, it is my opinion that the Development described above, as proposed to be constructed or rehabilitated, will utilize new or existing housing that conforms with the community's revitalization plan.

APPROVED AS TO FORM

Asantiusuan  
COUNTY ATTORNEY

Scott A. Stevens  
Signature

Scott A. Stevens  
Printed Name

County Administrator  
Title

757 253-6603  
Phone

3/3/2026  
Date

**NOTES TO LOCALITY:**

1. Return this form letter to the Owner/Applicant for inclusion in the tax credit application package.
2. Any change in this form may result in disqualification of the application.
3. If you have any questions, please contact the Tax Credit Allocation Department at [taxcreditapps@virginiahousing.com](mailto:taxcreditapps@virginiahousing.com).

# Tab K.2

Surveyor's Certification of Proximity to  
Public Transportation using Virginia  
Housing template

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## Surveyor's Certification of Proximity to Transportation

### General Instructions

1. This form must be included with the Application.
2. Any change in this form may result in a reduction of points under the scoring system.
3. If you have any questions, please contact the Tax Credit Allocation Department at [taxcreditapps@virginiahousing.com](mailto:taxcreditapps@virginiahousing.com).

Date: February 19, 2026

TO: Virginia Housing  
 601 South Belvidere Street  
 Richmond, Virginia 23220 2025 Tax Credit Reservation Request  
 Name of Development Powhatan Apartments  
 Name of Owner Powhatan Apartments James City LLC

RE:

Ladies and Gentlemen:

This letter is submitted to you in support of the Owner's Application for Reservation of Low Income Housing Tax Credits under Section 42 of the Internal Revenue Code of 1986, as amended.

Based upon due investigation of the site and any other matters as it deemed necessary this firm certifies that: the main street boundary entrance to the property is within:

- 2,640 feet or ½ mile of the nearest access point to an existing commuter rail, light rail or subway station; OR
- 1,320 feet or ¼ mile of the nearest access point to an existing public bus stop or a public bus stop to be built in accordance with existing proffers. If the public bus stop is proffered, include copy of executed proffers with this form.

Firm Name Townes Site Engineering  
 By Maynard J. Tinsman, III, LS  
 Its Director of Survey Services

Title

# Tab L:

PHA / Section 8 Notification Letter



## PHA or Section 8 Notification Letter

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If you have any questions, please contact the Tax Credit Department at [taxcreditapps@virginiahousing.com](mailto:taxcreditapps@virginiahousing.com).

### General Instructions

1. Because of conflicting program requirements regarding waiting list procedures, this letter is not applicable to those developments that have 100% project-based Section 8 or project-based vouchers.
2. This PHA or Section 8 Notification letter (or proof of delivery to the correct PHA/Section 8 Administrator) must be included with the application.
3. 'Development Address' should correspond to the application.
4. 'Proposed Improvements' should correspond with the application.
5. 'Proposed Rents' should correspond with the application.
6. 'Other Descriptive Information' should correspond with information in the application.

**NOTE: Any change to this form letter may result in a reduction of points under the scoring system.**

**PHA or Section 8 Notification Letter**

**Date:** March 4, 2026

**To:** Keith Denny  
5320 Palmer Lane , Suite 1A  
Williamsburg, VA 23188

**Re:** Proposed Affordable Housing Development

Name of Development: Powhatan

Name of Owner: Powhatan Apartments James City LLC

I would like to take this opportunity to notify you of a proposed affordable housing development to be completed in your jurisdiction. We are in the process of applying for federal low-income housing tax credits from Virginia Housing. We expect to make a representation in that application that we will give leasing preference to households on the local PHA or Section 8 waiting list. Units are expected to be completed and available for occupancy beginning on April 1, 2027 (date).

**The following is a brief description of the proposed development:**

**Development Address:** 226 Burtonwood Drive, Williamsburg, VA 23868  
\_\_\_\_\_  
\_\_\_\_\_

**Proposed improvements:**

New Construction:	# Units	_____	# Buildings	_____
Adaptive Reuse	# Units	_____	# Buildings	_____
Rehabilitation:	# Units	<u>48</u>	# Buildings	<u>6</u>

**Proposed Rents:**

Efficiencies: \$ \_\_\_\_\_ / month  
1 Bedroom Units: \$ \_\_\_\_\_ / month  
2 Bedroom Units: \$ 1,550.00 / month  
3 Bedroom Units: \$ \_\_\_\_\_ / month  
4 Bedroom Units: \$ \_\_\_\_\_ / month

**Other Descriptive Information:**

Powhatan is 48-unit, family property located in Williamsburg, VA.

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**PHA or Section 8 Notification Letter**

We Appreciate your assistance with identifying qualified tenants.

If you have any questions about the proposed development, please call me at 240.428.7799.

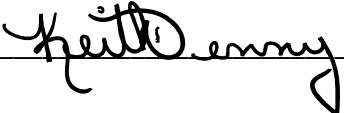
Please acknowledge receipt of this letter by signing below and returning it to me.

Sincerely yours.

Name Adam J. Stockmaster

Title Managing Member, TMG I LLC

**To be completed by the Local Housing Authority or Sec 8 Administrator:**

Seen and acknowledged by: 

Printed Name: Keith Denny

Title: Housing Programs Administrator

Phone: (757) 259-5349

Date: January 10, 2026

# Tab M:

Intentionally Blank

**N/A**

# **Tab N:**

Homeownership Plan

**N/A**

# **Tab O:**

Plan of Development Certification Letter



## Plan of Development Certification

---

**NOTE TO DEVELOPER:** You are strongly encouraged to submit this certification to the appropriate local official at least three weeks in advance of the application deadline to ensure adequate time for review and approval.

### **General Instructions**

1. 'Local Certification' section must be completed by the appropriate local official.
2. 'Development Description' must be provided by the Owner.
3. 'Legal Description' should correspond to the site control document in the application.
4. 'Other Descriptive Information' should correspond with information in the application.

Any change in this form may result in a reduction of points under the scoring system.

If you have any questions, please contact the Tax Credit Allocation Department at [taxcreditapps@virginiahousing.com](mailto:taxcreditapps@virginiahousing.com)

**Plan of Development Certification**

DATE: MARCH 10, 2026

TO: Virginia Housing  
601 South Belvidere Street  
Richmond, Virginia 23220  
Attention: Phillip Cunningham

RE: PLAN OF DEVELOPMENT CERTIFICATION

Name of Development: Powhatan  
Name of Owner/Applicant: Powhatan Apartments James City LLC  
Name of Seller/Current Owner: Powhatan Limited Partnership

The above-referenced Owner/Applicant has asked this office to complete this form letter regarding the site plan of the proposed Development (more fully described below). This certification is rendered solely for the purpose of confirming the status of plan of development or site plan approval of the Development. It is understood that this letter will be used by the Virginia Housing Development Authority solely for the purpose of determining whether the Development qualifies for points available under Virginia Housing's Qualified Allocation Plan for housing tax credits.

**DEVELOPMENT DESCRIPTION:**

Development Address:  
226 Burton Woods Drive  
Williamsburg, VA 23188

Legal Description:  
See attached legal description  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Plan of Development Number: N/A

Proposed Improvements:

New Construction:	# Units	_____	# Buildings	_____	Total Floor Area	_____
Adaptive Reuse	# Units	_____	# Buildings	_____	Total Floor Area	_____
Rehabilitation:	# Units	<u>48</u>	# Buildings	<u>6</u>	Total Floor Area	<u>37,200</u>

Other Descriptive Information:

Powhatan is 48-unit, family property located in Williamsburg, VA.

**LOCAL CERTIFICATION:**

- The proposed development described above has an approved final plan of development or site plan (as applicable to the site). No further plan of development or site plan approval is required before issuance of a building permit.
- The proposed development is an existing development with proposed renovations and no additional plan of development approval is needed.

The above plan of development approval is in effect until: December 31, 2027

Susan M. Istenes  
Signed  
Susan M. Istenes  
Printed Name  
Director of Planning, James City County  
Title  
757-253-6685  
Phone  
March 10, 2026  
Date

**NOTES TO LOCALITY:**

1. Return this certification to the developer for inclusion in the tax credit application package.
2. Any change in this form may result in **reduction of points** under the scoring system.  
If you have any questions, please contact the Tax Credit Allocation Department at [taxcreditapps@virginiahousing.com](mailto:taxcreditapps@virginiahousing.com)

**Legal Description**  
**Burton Woods II Apartments**

That certain parcel of land, in Berkley District, James City County, Virginia, containing 4.017 acres more or less, shown on plat of survey by Small Engineering, Inc., a copy of which is attached and according to which plat such parcel is described as follows:

BEGINNING at a point on the eastern right of way line of Burton Wood Drive (Phase I) which point is located approximately 472 feet south of SR 612 and 620 feet east of SR 614; then along a curve to the right having a radius of 451.81 feet a distance of 100.80 feet to a point; then S. 35° 44' 10" W. 237.28 feet to a point; then S. 54° 15' 10" E. 60.00 feet to a point; then N. 35° 44' 10" E. 237.28 feet to a point; then along a curve to the left having a radius of 391.81 feet a distance of 87.41 feet to a point; then S. 67° 02' 46" 60.00 feet to the beginning point.

BEING a part of the same real estate conveyed to Heritage Builders, Inc., a Virginia corporation, by deed from J. Cory Mulligan and Olive C. Mulligan, husband and wife, dated June 13, 1972, recorded July 7, 1972, Clerk's Office, Circuit Court, James City County, Virginia in Deed Book 137, page 652.

# Tab P:

Zero Energy or Passive House documentation for  
prior allocation by this developer

**N/A**

# **Tab Q:**

Documentation of Rental Assistance, Tax Abatement  
and/or existing RD or HUD Property

Filters >> State:ALL	Servicing Office:ALL	County:ALL
Mgmt Agent/Borrower:ALL	Fund Code:ALL	Paid Code:Active
Assigned To:ALL	Labor Housing Type:ALL	Agreement Status:ALL
Project Name:POWHATAN APTS	Sara Ind:ALL	538 Loan:ALL
Fiscal Year:ALL	Usable Units:ALL	Unpaid Bal Filter:UNPAID
Expiration:NA	Detail:Y	Summary:Y

Sort >> State/Servicing Office/County/Project Name

St	Srv Off	Cty	Project Name Case Nbr	Agrment Number	Apprvl Date	Type	Amt Oblg	Amt Vouchered	Unpaid Balance	Replaced By Agrmnt	Oblg Units	Usable Units
54	634	58	POWHATAN APTS 54-58-943824095 01-0	260100	12/11/2025	B	461,820.00	19,564.19	442,255.81		46	Y

Total Number of Tenants Receiving RA:43  
Active RA Units:46  
Average Months RA Usage from Project Payments: 26423.18  
Number of Months Ra Remaining at Average Usage:16

# **Tab R:**

Documentation of Utility Allowance calculation



Michael Sumpter  
Director, Residential  
Energy Services  
Lorax Partnerships, LLC  
808 St. Paul Street  
Baltimore, MD 21202

Matt Barila  
Development Officer  
TM Associates Management, Inc.  
1375 Piccard Dr., Suite 375  
Rockville, MD 20850

February 26, 2026

**Re: Powhatan Apartments Utility Allowances**

---

Matt Barila,

The following are estimated utility costs for the future Powhatan Apartments property. These estimates were calculated using the weighted utility cost average of each unit type elevation using Ekotrope v5.2.2.3804, and the utility rates are based on current Dominion energy rates from January 2026.

Supporting documentation for each unit type is attached to this letter below.

Unit Type	Heating Cost Monthly	Air Conditioning Cost Monthly	Water Heating Cost Monthly	Lighting & Appliance Cost Monthly	Electric Cost Monthly	Electric Cost Annually
2 bed	\$ 16.12	\$ 12.76	\$ 25.64	\$ 44.84	\$ 99.36	\$ 1,192

Thank you,

**Michael Sumpter**  
**RESNET RTIN 6933532**

# **Tab S:**

Supportive House Mandatory  
Certification and Documentation

**N/A**

# **Tab T:**

Funding Documentation

SDM1X560-M1XI  
OPR ID: N20046

ACCRUAL CALCULATION REQUEST

02/17/26  
10:52:56

ST 54 CTY 058 BORR 943824095 PROJ 01 0  
POWHATAN LP POWHATAN APTS

-----  
REQUEST: LOAN NBR (OPTIONAL) 000 AS OF DATE 021726 ACCRUAL CODE  
PAYMENT STATUS: .00 AMTS NOT APPLIED: .00  
NET STATUS: .00 BALANCES TOTAL  
DAILY INTEREST: .0000  
PASS OR DIAS: UNPAID PRINCIPAL 235,281.07  
UNPAID INTEREST .00  
UNPAID OVERAGE .00  
UNPAID OCCUPANCY SURCHARGE .00  
UNPAID LATE FEES .00

TOTAL DUE AS OF 02/17/26 235,281.07

NEXT TRAN SELECT ACTION (1-MENU 5-PNDG 6-HIST 7-EFCT 8-MISC)  
999403 ACCRL NE HST DTE



February 19, 2026

TM Associates Development, Inc.  
Adam J. Stockmaster  
President  
1375 Piccard Drive, Suite 375  
Rockville, MD 20850

RE: Construction and Permanent Financing Commitment  
USDA RHS 538 GRRHP Construction and Permanent Loan for the project known as Powhatan Apartments

Dear Mr. Stockmaster

Predicated upon the information that Bellwether Enterprise Real Estate Capital, LLC (Bellwether Enterprise) has received for the proposed 48-unit affordable (9% LIHTC) multifamily housing development, Powhatan located at 226 Burtonwood Drive, Williamsburg, James City County, VA 23188, we are pleased to offer you a Financing Commitment to provide the Construction and Permanent financing. Bellwether Enterprise would utilize the USDA RHS 538 Guaranteed Rural Rental Housing Program (GRRHP) for Acquisition/Substantial Rehabilitation of Multifamily/Senior Housing Guaranteed Loan program. Bellwether Enterprise is a nationwide USDA RHS lender, with staff experienced in the 538 GRRHP loan program.

We have performed an initial underwriting and sizing of this project, but Bellwether Enterprise will need to receive additional documentation and information in order to fully underwrite the proposed transaction in accordance with the RHS 538 GRRHP Handbook 1-3565 and 7 CFR Part 3565 statutory, regulatory and administrative requirements. The loan terms and requirements are subject to the loan product of the USDA RHS 538 GRRHP, the supporting Notice of Solicitation of Applications (NOSA), and at the Lender's sole discretion determined during our final underwriting. An Engagement Letter between the proposed Borrowing Entity and Bellwether Enterprise will set forth the understanding and agreement concerning the preparation and filing by Bellwether Enterprise of an application to obtain a Conditional Commitment from the USDA RHS and the NOSA to insure the loan for the subject development.

The subject community of Williamsburg, VA is eligible for the USDA RHS 538 GRRHP loan program as the population is less than 25,000 and is further confirmed by the RHS Site Eligibility Map. Furthermore, Bellwether Enterprise feels that this loan would be a perfect candidate for the USDA RHS 538 GRRHP insured loan program as follows:

- The project is located at 226 Burtonwood Drive, Williamsburg, James City County, VA 23188.
- The project site size is roughly a 3.58 acre tract.
- The number of units is proposed at 48 affordable LIHTC units, Multifamily Housing.
- The estimated Loan-to-Development Cost is <32.36>%.
- The estimated Debt Service Coverage in year one is <1.15>.
- The loan will be in the 1<sup>st</sup> lien position.
- The loan would be fully non-recourse.
- The loan would be fully assumable subject to Bellwether Enterprise and Rural Development approval.
- The proposed mortgage amount is <\$5,300,000>. The actual mortgage amount would be determined by Bellwether Enterprise and the Rural Development Guarantee Commitment underwriting.
- The estimated interest rate is 6.25%. The rate will vary with market conditions, and Bellwether Enterprise cannot "lock" the rate until a Conditional Commitment is issued by Bellwether Enterprise and the Rural Development.
- The proposed construction loan term is up to 2-years with month payments of interest only, and a proposed permanent loan term of 38 years and amortization over 40-years with monthly payments of principal and interest, or as otherwise set out in the USDA Rural Development Conditional Commitment.

The general fees, charges, and reserves of the USDA RHS 538 GRRHP and Bellwether Enterprise are as follows:

- RHS Initial Guarantee Fee: .60% of the RHS Guarantee Amount, due at the closing of the loan transaction to RHS.
- RHS Annual Guarantee Fee: .25% of the outstanding principal amount of the loan as of December 31<sup>st</sup> of each year and due January 1<sup>st</sup> of each year to RHS.
- Construction Contingency: Minimum of 2% of Construction Costs. Established at closing and must be funded in cash with funds other than the USDA RHS 538 GRRHP.
- Operating and Maintenance Reserve: Minimum of 2% of the Loan Amount. Established at closing and must be funded in cash with funds other than the USDA RHS 538 GRRHP. ***Unless otherwise waived by Rural Development for existing 515 properties.***
- Lease-up/Conversion Reserve: Minimum of 3-months of underwritten operation expenses (including annual Replacement Reserve Deposits and RHS Annual Guarantee Fee) and debt service. Must be funded approximately 30-days prior to the issuance of the first Certificate of Occupancy. ***Unless otherwise waived by Rural Development for existing 515 properties.***
- Bellwether Enterprise requires a non-refundable processing fee of \$2,500. to cover our out-of-pocket costs to be incurred in connection with the processing of the mortgage loan, including site inspection, credit report(s), assemblage and preparation of the application for filing with USDA. This fee is payable at the signing of this engagement letter.
- The total Financing Fee payable to Bellwether Enterprise at closing is 1.50% of the loan amount.
- The total Permanent Placement Fee payable to Bellwether Enterprise at closing is estimated at \$5,300.
- Bellwether Enterprise also requires payment in advance, unless otherwise agreed to terms by Bellwether Enterprise, for the engagement of certain third-party contractors (Environmental, Appraisal and Market evaluations, Needs Assessment, and other reports as may be required for the processing of your loan). Bellwether Enterprise will only contract with qualified contractors and will negotiate the lowest possible fees for their services.
- All costs and expenses incurred in connection with this project shall be paid by the Borrower, including, but not limited to, recording, title expenses, survey costs, third party construction inspector estimated at \$1,500 per inspection/draw, Borrower legal expense, and Bellwether Enterprise legal expense estimated at \$20,000. These expenses are allowable costs and can be included in mortgage proceeds.

We are excited about the opportunity to work with you on the < Powhatan Apartments <multifamily housing project located in <Williamsburg, VA>, and appreciate you choosing Bellwether Enterprise. If you have any questions, or need additional information, please call me at (216) 870-9935 or e-mail me at [bob.morton@bwe.com](mailto:bob.morton@bwe.com).

Sincerely,



Robert Morton  
Senior Vice President  
Director of RHS Programs  
Bellwether Enterprise Real Estate Capital, LLC



## Letter of Interest

March 09, 2026

Adam Stockmaster, Manager  
Powhatan Apartments James City LLC  
1375 Piccard Drive, Suite 375  
Rockville, MD 20850

### **RE: Powhatan- Equity Bridge Loan**

To Whom It May Concern,

Enterprise Community Loan Fund, Inc. (“ECLF”) has conducted a preliminary review of the information and assumptions around the proposed project known as Powhatan in Williamsburg, VA. The Project will feature a 48-unit multi-family affordable rural housing development. The property will provide 8 two-bedroom units targeted at households at 40% AMI, 16 units targeted to households at 50% AMI and 24 units targeted to households at 60% of AMI. ECLF has a long history of supporting affordable housing projects and as such, we are pleased to issue this Letter of Interest (“Letter”) concerning this request.

It is our understanding that the total development costs of the project are estimated at \$16.39 million. The Project will be financed through a number of sources including Federal Low Income Housing Tax Credits, a USDA 538 construction to perm loan and other financing. This Letter is not intended to convey or constitute a commitment, promise or offer to lend on the part of ECLF. Rather, we wish to convey to you our willingness to further examine all aspects of the proposed transaction based upon the representations you have made and the information with which you have supplied us. The loan would be subject to full underwriting and require approval by credit committee. The preliminary terms of the transaction will likely be as follows:

**Amount:** up to \$2,660,345 (estimated)

**Loan Purpose:** Tax Credit Equity Bridge to fund Construction

**Term:** 24 months

**Rate:** Indicative rates 7.0%-7.5%

**Collateral:** Secured by an assignment of the tax credit equity bridged by the ECLF Loan; up to 80% of remaining tax credit equity-pay ins.

**Repayment:** Tax Credit Equity Pay-ins.

We look forward to working with you on this exciting project. Please contact me at (410) 772-2604 or [uoniovokuko@enterprisecommunity.org](mailto:uoniovokuko@enterprisecommunity.org) if you have any questions.

Sincerely,

*Ugonna I. Oniovokuko*  
Ugonna I. Oniovokuko  
Senior Loan Officer

# **Tab U:**

Acknowledgement by Tenant of the availability of Renter  
Education provided by Virginia Housing



# Tenant Disclosure Form – Acknowledgement of Free Renter Education Through Virginia Housing

## Addendum to Lease Agreement

Virginia Housing provides a variety of free resources that can assist tenants throughout their time within a multi-family rental community. Some of the resources have been highlighted as follows:

1. **Renter eBook:** Virginia Housing offers a comprehensive guide on how to be a successful renter via the following link: <https://www.virginiahousing.com/renters/education>
2. **Fair Housing Resources:** Federal and state fair housing laws protect renters from discrimination. Information and questions a tenant may have pertaining to federal Fair Housing Law and regulations can be answered online through the Virginia Fair Housing Office via the following link: [https://www.dpor.virginia.gov/FairHousing/#About\\_Fair\\_Housing\\_Law](https://www.dpor.virginia.gov/FairHousing/#About_Fair_Housing_Law)
3. **Online Courses:** Tenants have access to register to a variety of free online courses through Virginia Housing’s Learning Center. The following link for registration is provided: <https://vhdalearningcenter.mkscloud.com/idserv/login/login?signin=19e12263ba7f0af66f195aabb58956d3>
4. **Renter Rights and Responsibilities:** As a renter in Virginia, you as a tenant have legal protections under the Virginia Residential Landlord and Tenant Act (VRLTA). These include the right to privacy, a fair application fee and a certain level of security, among others. A full list of renter rights and responsibilities is provided through the Virginia Law Information System via the following link: <https://law.lis.virginia.gov/vacode/title55.1/chapter12/>
5. **Quick Links:** Additional resources are provided to the tenant on Virginia Housing’s website at the following link: <https://www.virginiahousing.com/renters/education>

By signature below, I/We acknowledge that I/We have been notified of the availability of free Renter Education from Virginia Housing. Signature is also confirmation that I/We have received adequate disclosure by the development and management agents of the property in which I reside of the materials the Housing Authority makes available to me as a tenant and renter of multi-family housing.

\_\_\_\_\_  
Tenant Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Tenant Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Owner/Agent

\_\_\_\_\_  
Date



# **Tab V:**

Nonprofit or LHA Purchase Option or Right of First  
Refusal

**N/A**

# **Tab W:**

Internet Safety Plan and Resident Information Form

- Resident Internet Education Information
- Draft Resident Acknowledgement Form
- Internet Security Plan



# Internet Safety

Playing it safe while playing online



Hi there kids! I am Charlie Cardinal and this is Speedy the Crime Fighting Hamster. We are here to introduce you to the basics of Internet Safety and some of the villains you need to watch out for. There are some bad characters out there, so you have to protect

yourself. Your parents won't always be there to watch out for you, so stay sharp, learn all you can, and stay safe!



# Privacy & Personal Information



Privacy is being able to keep things secret or hidden from others.

Personal Information is information about you or your family such as your address, a social security number, your parent's bank account, or how much money they have.

Criminals love to get people's personal information because they can pretend to be you, or use your money to buy things.

They can also make money off of your information by selling it to others. Companies or other criminals will use your info to send you junk mail or spam emails.

Criminals learning your address can be very bad. They may break in and steal from you. Protect your safety and your belongings, by keeping your information a secret.

These bad people may even use your personal information to trick someone else in your circle of friends and family. People sometimes tell criminals things that they shouldn't if they think that they are communicating with someone they know.



Think before you click



Do you know who sent that email?



# Passwords

One of the most important things you need to learn is how to create strong passwords. A password is a code you type in to let the computer know it is really you.

Having an easy to guess password could allow someone to snoop around in your private information.

The way to make your password strong is to never use your name or your birthday. Use something hard to guess, but easy for you to remember. Make your password at least 8 characters long, and mixing numbers, symbols, and upper and lower case letters makes the password strong just like Speedy. Avoid using the same password over and over. That way if they do figure out your password, they only gain access to one account. And never leave your passwords written down where someone can find it.



A great tool online that creates kid friendly passwords is the website, [www.dinopass.com](http://www.dinopass.com)

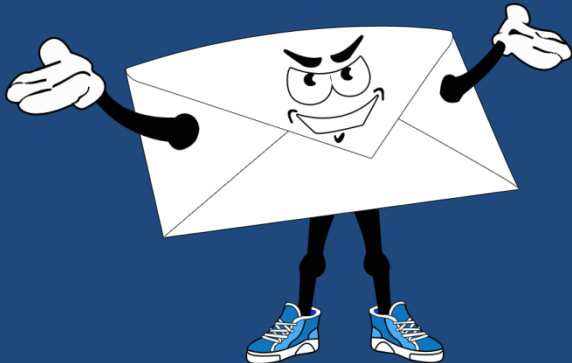
# Spam



Spam is basically email that you receive from different companies or strangers that you did not sign up for. Most times it isn't from real companies and usually the sender is up to no good.

Spam emails can sometimes be a phishing scam. Phishing emails are emails that look like it is from some trusted source. A place like your bank, the IRS where taxes are collected, or some other business you shop with often. They make their email look like it is the real thing with logos, and they put links in the email baiting you to click them. Once you click the link, you could be launching a program that can damage your computer in some way or collect your personal information.

Spam emails can also use winning a sweepstakes or some other type prize to trick you into trusting the email source. After they hook you in, they inform you that to collect your prize, you must give them your credit card number.



How do you know it is spam?

Spam emails typically have a bunch of spelling and grammar errors or a mention of someone you don't know in the subject line. Don't Open It! Delete those emails right away.



# Malware



Malware is a program written with the intent to harm your computer in some way.

Programs such as this, may be waiting for you to do something(a trigger), so that it can run. This could be the clicking of the link or opening an email attachment.

When searching for free downloads online, be very careful. There are a lot of sites out there trying to trick you. They will pay to make their site get returned at the top of the list of search results. Then when you access the page, they use blinking buttons to trick you to click. The result of clicking usually ends up being your computer loaded up with malware.

Once your machine is infected, it can change browser settings, create unusual popup ads on your computer and then pass the malware on to someone else.



Spyware is a program that gets onto your computer through a download or a virus and it gathers information about you and sends this back to its creator.

Some of the types of information spyware might send back to home base is email addresses of you or your contacts, passwords, account numbers, and credit card numbers.

Some spyware out there records how you use your computer and what you search for online.

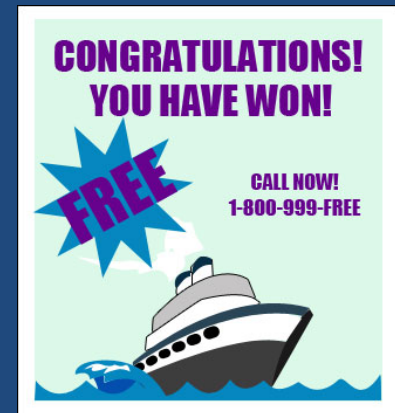
# Adware

Adware is software that you are allowed to use by the author because of the advertisements that pop up occasionally during the game. Many of these type games you will find in the form of apps on your phone or devices.

Through the addition of advertisements, the developer gains some income that may supplement a discount to the user, sometimes making the software free.

Often after using the product with the ads, a consumer will purchase the software to get rid of the ads.

<http://www.pctools.com/security-news/what-is-adware-and-spyware/>



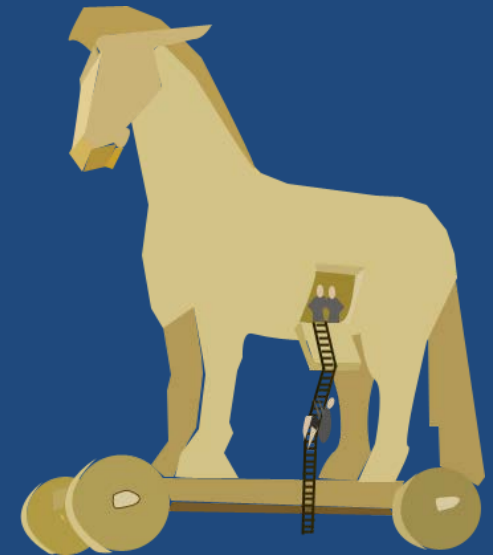
# Trojan Horse

The name for the Trojan Horse virus was derived from tale of the Trojan Horse constructed by the Greeks to gain access to the city of Troy. The wooden horse was left at the gates as an offering to Athena. The horse was then wheeled into the city and out came Greek fighters hiding inside. <http://www.britannica.com/topic/Trojan-horse>

A Trojan horse virus is a form of malware that is dressed up as something interesting or software from a source we are familiar with. The purpose is to trick the person into installing it. This allows the creator of the Trojan to do damage to data or software on your computer. They also will set up a 'back door' or access point that allows them to access your system.

Trojan viruses don't spread by infecting other files and they cannot duplicate themselves.

<http://www.webopedia.com/DidYouKnow/Internet/virus.asp>



# Worms

Worms are malware that can duplicate itself and spread to other computers. Worms always do something bad, even if it is just slowing things down.

Worms will frequently set up the ability for computers to be taken over by the worm's author by creating backdoors on the host computer. These computers are then called a "zombie computer". "Zombie computers" can be used to send out spam or as a shield to hide the web address of people who want to do bad things.

<http://www.webopedia.com/TERM/Z/zombie.html>





# Virus

A virus is a small program that is created to spread from one computer to the next and to mess up the way your computer works.

Many times viruses hop from computer to computer via email attachments or messages. They can also hide in funny pictures(memes), e-cards, or other desirable file attachments. It can also be sent through an instant message.

A virus can corrupt your data, or worse, delete it. It can also email copies of itself to your friends.

Keeping your anti-virus software up to date is key to protecting against the latest viruses and other security threats.

<https://www.microsoft.com/security/pc-security/virus-whatis.aspx>

# Social Media



Privacy settings on social media accounts are set up as public when you first get one. Unless you want everyone to be able to look at all of your photos and other private stuff, you must go into your account settings and change this.

Something to remember is whatever you post and say on your page can be shared by your friends. Think about what you post online, BEFORE you do it. What you post, could be seen by anyone at any time depending on your settings and the friends you keep. Because we can take pictures of our screens, there is really no setting that can protect you. Think twice about what you are sharing with others, so there are no regrets later.

Make sure you know the people that you accept friend requests from. Sometimes people try to friend you to hack your Facebook account or access your contacts. Once you are hacked they will send out strange messages or friend requests to your contacts. Protect your friends and yourself by being cautious with friends and creating strong passwords for your social media accounts.

# Geotagging



Geotagging is the bit of data that your electronic device packages with your picture that has information about where the picture was taken. This is something that can be turned on and off in your device and typically comes turned on until you change the setting.

When your photo is geotagged, this gives people information about your location. Letting outsiders know where you are, can allow them to plan to steal your belongings or vandalize your home.

Consider if you post a photo every Wednesday in your outfit ready to walk to ball practice and geotagging is turned on. This shows you have a routine and gives a rough area you will be in. A predator could come and take you away.

Another issue with allowing the geotagging to occur is you don't have control of your own privacy. Everyone does not need to know where you are all of the time, keep this information private.

<http://www.nytimes.com/2010/08/12/technology/personaltech>



# Be Careful of What You Say!



Defamation: Defamation is the blanket word used for all types of untrue statements made about others. [Definition of Defamation on Law.com](#)

Slander: When someone orally tells one or more people an untruth about someone, which will harm the reputation of the person it is about. It is not slander if the untruth is in writing of some sort or if it is broadcast through television or radio.

[Definition of Slander on Law.com](#)

Libel: This is where someone publishes to print(including pictures), written word, online posts, blogs, articles, or broadcast through radio, television, or film, an untruth about another which will do harm to the person's reputation. [Definition of Libel on Law.com](#)



# Be Careful of What You Say!



Much of the things people post online may get ignored, and you may get lucky and avoid legal action. But, when someone gets angry and files a lawsuit it can cause a major headache and possibly hit you hard in the wallet.

You might think you should have a right to openly complain about a company and their bad service or lousy product. Well when it comes to this, it is not always that simple. You can get sued for this and even if the judge agrees with you, you still have to pay for a defense attorney. Think twice and make sure that whatever you have to say is worth any headache you may have pop up later.

<http://ideas.time.com/2013/01/07/yelp-reviewers-beware-you-can-get-sued/>

On social media, people get into the habit of letting their emotions get the better of them and they end up speaking their minds about others online. When that person feels that this damages their character, they may opt to sue the other person for defamation. Even if their case is not successful, the stress, money, and time that you spend defending yourself is not worth it. To read more about defamatory social media posts, [click here](#).

# Stranger Danger Online



When you think of being on your computer or other electronic device in your own home, you probably think you are safe. Your mom is in the next room, what could happen?

Well there are people online that are up to no good. They go in chat rooms and pop up on your instant messenger, looking for someone to “groom”.

What is grooming you say? Well, grooming is when a stranger (can be any age) finds someone they are interested in, usually a minor. They act really nice and maybe they pretend they are much younger than they really are, like they are a kid just like you. Then they try to get you to like them and to trust them. They may ask you not to tell anyone you are talking to them. This is not okay and is a warning sign of a possible groomer.

# How to Protect Yourself in Online Chats

- Choose chat sites designed for kids, such as [www.kidzworld.com](http://www.kidzworld.com). Kidzworld is moderated and its aim is to protect kids from unwanted requests and online bullying.
- Beware of people you don't know. If they are asking too many questions or being too friendly they may be up to no good.
- If someone asks you to send them a picture or sends you a picture or video that is inappropriate, tell an adult or report them to the site moderators.
- Don't give out personal information to strangers online
- Don't tell strangers where you live or give them your telephone number
- Don't send strangers pictures of you or others
- If you are being bullied or threatened online, tell an adult or someone you trust





# Cyberbullying

- Cyberbullying is the **willful and repeated harm** inflicted through the use of computers, cell phones, and other electronic devices.
- Using PhotoShop or other tools to create harassing images.
- Posting jokes about another person on the internet
- Using the internet to entice a group to physically harm another person.
- Making threats online using IM, email, social networking sites, or other electronic devices.



# Consequences of Cyberbullying

Anything that you write, pictures that you post, or videos that you upload can be used by your school to suspend you.

College students have been removed from their athletic teams and lost college funding for writing negative comments about their coach.

When applying to colleges, they will search online to see what kind of person you are. They can deny you access if they don't like what they find.

When businesses are looking at people to hire for a job they will many times use social media to see what kind of person they are. Mean or inappropriate type posts can prevent you from getting the job you desire.

Cyberbullying can also be considered a crime and participating in this type of behavior can land you in big trouble.

# Consequences of Cyberbullying

- § 18.2-152.7:1. Harassment by Computer; Penalty makes cyberbullying a crime.
- Carries a \$2500 fine and punishable by up to **12 months in prison.**

There are many websites designed to inform and decrease the number of bullying cases we see each year. The U.S. Department of Health and Human Services has created a website with lots of resources to help combat bullying of all kinds - [www.stopbullying.gov](http://www.stopbullying.gov)

If you experience cyberbullying or witness it, tell someone such as a school counselor, teacher, or a parent.





# The Effects of Cyberbullying

- Victims feel depressed, sad, angry, and frustrated.
- Victims become afraid and/or embarrassed to attend school.
- Can lead to low self-worth, family problems, academic problems, school violence, and bad behavior.
- Victims can also develop thoughts of killing themselves and possibly act on these feelings.
- There are no positive effects of cyberbullying, only pain and suffering for the victims.
- The affects of being bullied can affect the victim into adulthood and prevent them from being all they can be in the future.



# Dealing with Cyberbullying

- Never do the same thing back, 2 wrongs don't make a right
- Tell them to stop
- Block their access to you
- Report it to the site you are on such as Facebook or Twitter
- NEVER pass along messages from cyberbullies, stop the spread of this behavior
- Set up privacy controls and keep the bully out of your friends list
- Don't be a cyberbully yourself
- If you witness someone getting bullied, tell someone so it can be stopped. Many times the person being bullied won't tell out of fear.
- Spread the word that bullying is not cool
- Don't laugh or encourage the bully, it is not funny and it can lead to major trouble for the person doing the bullying.



# About Sexting



“Sexting” is when someone sends or receives sexually explicit or non-PG Rated pictures or video electronically, mainly via cell phones or tablets.

The numbers on how many teens say that they have sent/posted nude or semi-nude pictures or videos of themselves is upsetting.

20% of teens between 13 to 19 years of age have engaged in sexting.

22% of teen girls

18% of teen boys

11% of teen girls between 13 to 16 years of age have engaged in sexting.

Did you know that if you forward a picture of a sexual or nude photo of someone underage, you are as responsible for the image as the original sender?? You can be charged with a crime.

Many teens don't realize that if you send a picture of yourself that is inappropriate and that picture ends up online, it could be there forever. You can never fully delete things that end up on the web.



# About Sexting



There is no age minimum that protects young people from getting charged with a sexual offense.

Something that you think is okay or just a joke, might land you in a ton of trouble. For example, you might take a picture of your friend naked to embarrass them, but if they are under the age of 18, this is considered production of child pornography.

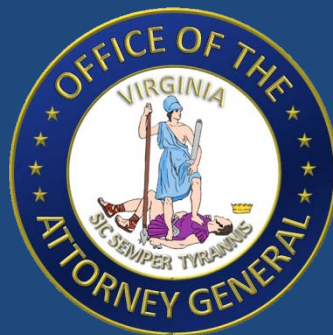
If you are sent something inappropriate, do not share it and don't delete it. Tell an adult immediately. You may feel like you are getting your friend into trouble, but you are protecting yourself and you are protecting them. They may not be thinking about the consequences or the effect this behavior can have on their future.

Anyone that gets convicted of a sex offense, will have to register as a sex offender. Sex offenders have to keep their address updated and keep a current photo with the police. The information goes on the sex offender registry where anyone can go and see your picture and where you live online.

**REMEMBER:** You can't control what other people do with your photos. Even if you think you are sending it to someone you can trust, they may end up surprising you. You can't trust anyone with something as private as that. Don't Do It!

# Legal Consequences of Sexting

- The Virginia Department of Education has an excellent resource with real life examples of the consequences of sexting that can be found [here](#).
- The Attorney General's Virginia Rules website is designed to give Virginia Youth information on all the laws in the state. [Virginia Rules](#) has extensive information on sexting and other internet security risks.
- This article in The Virginian-Pilot tells a story of five Virginia teens getting charged with felonies for sexting and being in possession of sexually explicit photos of a minor, read more about it [here](#).



Information Provided By:  
Office of the Attorney  
General

202 North Ninth Street  
Richmond, Virginia 23219  
(804) 786-2071  
[www.ag.virginia.gov](http://www.ag.virginia.gov)

**WiFi Internet Service Resident Acknowledgement Form**

RESIDENT(S):	LANDLORD:	UNIT ADDRESS:
--------------	-----------	---------------

This form is an Addendum and is hereby incorporated and made a part of the Lease Contract and sets out the terms and conditions on which wireless internet service (WIFI) is provided free of charge. By signing this Addendum, you acknowledge that your apartment is equipped with a device that provides WIFI internet service broadcasted throughout the unit for your use, you acknowledge that you have received the Resident Internet Education Information Manual from an onsite management team member, you acknowledge that you have received and reviewed the Free Wifi Internet Service Terms, and you agree to the Free Wifi Internet Service Terms.

The service provided includes internet speed of 10MB download/3MB upload and may vary at peak times of the day. Should you wish to purchase your own internet service for your unit, you will need to contact the provider \_\_\_\_\_ at \_\_\_\_\_

You further acknowledge that this service may not be uninterrupted, error-free, nor guarantee the security of the service and/or harmful applications your device may be exposed to.

Resident(s) must not use the service for any unlawful or inappropriate purposes. Management reserves the right to terminate this service without notice at any time.

Resident(s) agree to report any repairs or maintenance needed to this equipment directly to an onsite management team member. Should resident(s) cause damage to the equipment or remove the equipment from the dwelling, management will assess the cost and resident(s) must pay management for damages and/or the actual cost of replacement of the equipment device. If not previously paid, management will assess the cost against the resident's security deposit and/or account statement upon move-out.

Resident Signature		Date		Resident Signature		Date
Resident Signature		Date		Resident Signature		Date
Resident Signature		Date		Resident Signature		Date
Authorized Agent for Owner		Date				



## Resident Internet Education Information

### Free Wifi Internet Service Terms

Date Last Modified: -13-2019

Welcome home to your new apartment! Below you will find the information needed to connect to the free WIFI internet service provided in your unit ("Service"), which is provided to you by \_\_\_\_\_ . By using this Service or by clicking "accept" or "agree", you are agreeing to the terms of these Free Wifi Internet Service Terms ("Terms"). IF YOU DO NOT WANT TO AGREE TO THESE TERMS, YOU MUST NOT ACCESS OR USE THE SERVICE.

Wireless SSID: \_\_\_\_\_

Wireless Password: \_\_\_\_\_

#### 1. Extent of the Service

1.1 We do not recommend in particular the use of any websites (or other internet related services) Service and your use of Service is carried out entirely at your own risk.

1.2 We have no responsibility for, or control over, the Service you access and do not guarantee that the Service is error or virus free.

1.3 We have no responsibility for, or control over, the information you transmit or receive via the Service.

1.4 Save for the purposes of network diagnostics, we do not examine the use to which you put the Service or the nature of the information you send or receive.

1.5 We do not guarantee:

1.5.1 the availability of the Service;

1.5.2 the speed at which information may be transmitted or received via the Service; or

1.5.3 that the Service will be compatible with your equipment or any software which you use.

1.6 While we take reasonable steps to ensure the security of the Service and to prevent unlawful access to information transmitted or received using the Service we do not guarantee the security of the information which you may transmit or receive using the Service or located on any equipment utilizing the Service and you accept that it is your responsibility to protect your information and have adequate security in terms of equipment and procedures to ensure the security, integrity and confidentiality of your information and data.

1.7 We reserve the right at all times to withdraw the Service, change the specifications or manner of use of the Service, to change access codes, usernames, passwords or other security information necessary to access the service.

## 2. Your Use of the Service

2.1 You must not use the Service to access Service, or send or receive e-mails, or otherwise transfer, stream or transmit content which:

2.1.1 are defamatory, threatening, intimidatory or which could be classed as harassment;

2.1.2 contain obscene, profane or abusive language or material;

2.1.3 contain pornographic material that is text, pictures, films, video clips of a sexually explicit nature

2.1.4 contain offensive or derogatory images regarding sex, race, religion, color, origin, age, physical or mental disability, medical condition or sexual orientation

2.1.5 contain material which infringe third party's rights including intellectual property rights

2.1.6 in our reasonable opinion may adversely affect the manner in which we carry out our business or

2.1.7 are otherwise unlawful or inappropriate

2.2 Music, video, pictures, text and other content on the internet are copyrightable works and you should not download, alter, e-mail or otherwise use such content unless certain that the owner of such works has authorized its use by you.

2.3 We may terminate or temporarily suspend the Service if we reasonably believe that you are in breach of any provisions of this agreement including but not limited to clauses 2.1 to 2.2 above.

2.4 We recommend that you do not use the service to transmit or receive any confidential information or data and should you choose to do so you do so at your own risk.

2.5 The Service is intended for personal, non-commercial use only. In the event that you use the Service for commercial purposes we would specifically refer you to clause 2.5

## 3. Criminal Activity

3.1 You must not use the Service to engage in any activity which constitutes or is capable of constituting a criminal offense, either in the United States or in any jurisdiction throughout the world.

3.2 You agree and acknowledge that we may be required to provide assistance and information to law enforcement, governmental agencies and other authorities, and by using the Service you consent to our compliance with such requirements.

3.3 You agree and acknowledge that we may keep a log of the Internet Protocol "IP" addresses of any devices which access the Service, the times when they have accessed the Service and the activity associated with that IP address

3.4 You further agree we are entitled to co-operate with law enforcement authorities and rights-holders in the investigation of any suspected or alleged illegal activity by you which may include, but is not limited to, disclosure of such information as we have whether pursuant to clause 3.3 or otherwise, and are entitled to provide by law, to law enforcement authorities or rights-holders. YOU WAIVE AND AGREE TO HOLD HARMLESS US AND OUR AFFILIATES, LICENSEES AND SERVICE PROVIDERS FROM ANY CLAIMS RESULTING FROM ANY ACTION TAKEN BY ANY OF THE FOREGOING PARTIES DURING, OR TAKEN AS A CONSEQUENCE OF, INVESTIGATIONS BY EITHER SUCH PARTIES OR LAW ENFORCEMENT AUTHORITIES.

#### 4. Other Terms

4.1 You agree to indemnify, defend, hold harmless, and compensate us fully for any claims or legal action made or threatened against us by someone else because you have used the Service in breach of these Terms, including but not limited to clauses 2.1 to 2.2 and 3.1 above.

4.2 We reserve the right to amend, alter, or modify these Terms at any time.

## Internet Security Plan

For basic issues and education on internet security this will be handled by onsite staff.

Basic Security Includes:

- Wifi password reset assistance
- Reset Cox provided device to factory settings at each unit turn
- Staff will not troubleshoot computers issues only issues related to the device and its security provided by cox

Not Basic security issues that will be triaged with Cox Support include:

- Copy right issues
- Illegal downloading of copyrighted files

Below are a list of Security Features that would come with the Cox managed internet per unit service

Baseline Privacy interface Plus (BPI+)

Stateful Packet Inspection Firewall (SPIF)

Customizable Firewall Security Levels

Intrusion Detection and Prevention

Multilevel access policy

Security and Service segregation per SSID

Parental Control – URL based website filtering and Time based access control

# **Tab X:**

Marketing Plan for units meeting accessibility  
requirements of HUD section 504

**Powhatan Apartments**  
**Williamsburg, James City County, Virginia**

**Marketing Plan for Units Meeting Accessibility Requirements of HUD Section 504**

This marketing plan has been developed for the units in this apartment development that will be newly constructed to meet the accessibility requirements of HUD Section 504 (the "Marketing Plan"). This Marketing Plan has been designed to convey to potential residents with disabilities, that **Powhatan Apartments** will be a unique rental housing experience, with a commitment to excellent management and resident service, as well as an expectation of resident responsibility. This plan will address ways in which property management will endeavor to secure and actively market the project to qualified tenants that are mobility impaired and likely will be served well by the features of a HUD Section 504 designed units. In addition, management will ensure quality tenancy, and effective management of the property.

The Management Agent will be responsible for the management of **Powhatan Apartments** as well as the marketing efforts to mobility impaired persons. The Management Agent will be responsible for all of the traditional management functions, including rent collection, maintenance, record keeping, reports, development of budgets, and monitoring resident income qualifications.

**I. Affirmative Fair Housing Marketing**

The Management Agent is pledged to the letter and the spirit of the VHDA- Virginia Housing Development Authority policy of the achievement of equal housing opportunity throughout the state and will actively promote fair housing in the development and marketing of this project. Management Agent, its Officers, Directors and employees will not discriminate on the basis of race, creed, color, sex, religion, familial status, age, disability or sexual orientation in its programs or housing. They will also comply with all provisions of the Fair Housing Act.

Any employee who has discriminated in the acceptance of a resident will be subject to disciplinary actions which may include dismissal. All persons who contact the office will be treated impartially and equally with the only qualification necessary for application acceptance being income, and conformity with the requirements of the VHDA- Virginia Housing Development Authority, Section 8 and Tax Credit programs. All interested parties will be provided a copy of the apartment brochure. Any resident who has questions not answered by the leasing staff will be referred to the Supervisor of the site staff.

Any unit which is designated as a unit for people with disabilities and that conforms to Section 504 of the Rehabilitation Act will be held vacant as long as it takes to find a qualified tenant.

**II. Marketing and Outreach**

Locating people with disabilities to occupy the units meeting accessibility requirements of HUD Section 504 will be accomplished as follows:

**I. Networking**

The Management Agent will contact local centers for independent living and disability services boards and other service organizations via phone and printed communication. The contacts will include the following organizations:

**Resources for Independent Living, Inc.** (804) 353-6503

**Virginia Family Special Education Connection**

<https://vafamilysped.org>

**Virginia Department of Medical Assistance Services** 804-786-7933

<http://www.dmas.virginia.gov/>

**Virginia Department of Behavioral Health & Developmental Services** 804-786-3921

<http://www.dbhds.virginia.gov/>

## **2. Print Media**

**Print media sources will also be identified in James City County area that cater to people with disabilities as well as the public at large. These typically include the Williamsburg Yorktown Daily and other local, minority oriented newspapers. Other sources may include, but are not limited to, rental magazines such as the Apartment Shoppers Guide, Apartments For Rent, etc. All advertising materials related to the project will contain the Equal Housing Opportunity logo type, slogan or statement, in compliance with the Fair Housing Act, as well as the fact that units for people with disabilities are available.**

## **3. Resident Referrals**

**An effective Resident Referral program will be set up, in which current residents are rewarded for referring friends, coworkers, and others who may have disabilities to the property. These referrals are generally the best form of advertising as it attracts friends who will want to reside together, thus binding the community. Residents will be offered incentives, to be determined, for referring qualified applicants who rent at the property. Flyers will be distributed to residents along with the project newsletter announcing the tenant referral program.**

## **4. Marketing Materials**

**Additional marketing materials are needed in order to further support the specific marketing effort to people with disabilities. All printed marketing materials will include the EHO logo.**

These marketing materials include:

Brochures - A simple, two color brochure can be produced at low cost which will effectively sell the apartments and community. This brochure will include the floor plans, a listing of features and amenities. The floor plans should be printed in as large a format as possible.

Flyers - As mentioned earlier, a flyer campaign can be used effectively to market the community. Each flyer should incorporate graphics as well as a small amount of copy and should be designed to generate traffic. As such, each flyer should include a special offer with a deadline

Internet – Listing on VirginiaHousingSearch.com

### **III. Public and Community Relations**

Equal Housing Opportunity promotions - all Site Signage containing the EHO logo and Fair Housing posters are displayed in English and Spanish in the Rental Office. Also posted in the Rental Office are instructions to anyone who feels they have been discriminated against to contact the Supervisor of the site staff at the Management Agent directly. The Management Agent encourages and supports an affirmative fair housing marketing program as required by VHDA- Virginia Housing Development Authority in which there are no barriers to obtaining housing because of race, color, religion, national origin, sex, age, marital status, personal appearance, sexual orientation, family responsibilities, physical or mental handicap, political affiliation, source of income, or place of residence or business.

### **IV. Preference for Persons with Intellectual or Development Disability**

First Preference will be given to persons with an intellectual or development disability (ID/DD) as determined by the Virginia Department of Medical Assistance Services (DMAS) or the Virginia Department of Behavioral Health and Developmental Services (DBHDS). This will be accomplished by obtaining tenant referrals from the Virginia Department of Medical Assistance Services (DMAS) or the Virginia Department of Behavioral Health and Developmental Services (DBHDS), subject to appropriate federal approval.

## Announcing a new grocery benefit program for eligible school-aged children!

The Virginia Department of Social Services (VDSS), in collaboration with the U.S. Department of Agriculture's Food and Nutrition Service, has launched Virginia SUN Bucks.

Qualifying families will receive a one-time \$120 per-child benefit.

Please visit [www.VirginiaSunBucks.com](http://www.VirginiaSunBucks.com) for more information about eligibility, how to apply, frequently asked questions and community partner resources.

Login | English | Español | Printer Friendly | Accessibility Tools  Select Language 

# VirginiaHousingSearch.com

AFFORDABILITY CALCULATOR

RESOURCES

FIND HOUSING

LIST HOUSING

## Powhatan Apartments

226 Burton Woods Drive - Williamsburg, VA 23188



We Do NOT Accept Section 8 Vouchers

[↓ Report an Issue ↓](#)

### Income Restricted

\$652 - \$836

Income Based Rent 

Deposit \$652 - \$836

### Waiting List

One Year Lease

Utilities Included: Water, Sewer, Trash Pickup

Application Fee: \$12 Per Adult 

Credit Check  : YES    Criminal Check  : YES

### 2 Bed • 1 Bath • Apartments

750 sq.ft. • Built 1977 (approx.)

Up to 5 Occupants

Contact Amanda Powhatan Apartment, Property Manager or Realtor

Phone [757-258-3023](tel:757-258-3023)

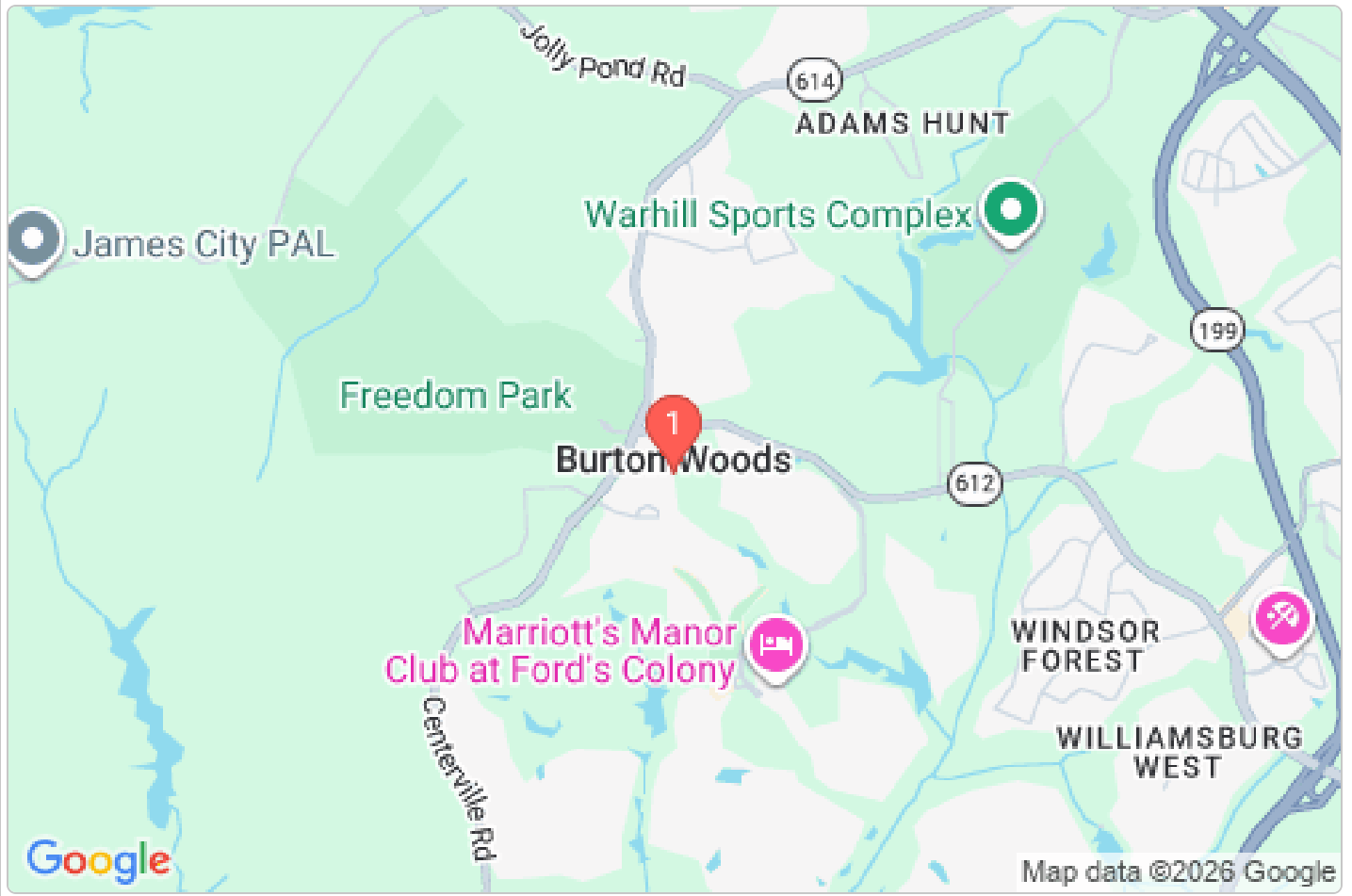
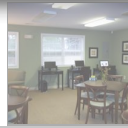
Fax 757-258-9610

Address 226 Burton Wood Court  
Williamsburg, VA 23188





Laundry Room



### Basic Features

Pets

Not Allowed 

Smoking

Allowed 

Trash Service	Yes
Address-Based School District	James City County Public Schools
School Information	James City County
Flooring	Carpet, Padding Under Carpet, Tile, Vinyl
Other Features	Lawn Care Included, Fenced Backyard, Dining Room

## Appliances

Microwave	None
Refrigerator / Freezer	Freezer On Top
Clothes Washer	No Hookup
Clothes Dryer	No Hookup
Laundry Room / Facility	On Site
Other Appliances	Garbage Disposal, Miniblinds

## Utilities

Air Conditioner	Central
Heating Type	Electric
Water Heater	Electric
Cable Ready	Yes

## Specialized Information

Listing ID	313142
Accepts Section 8/HCVP Vouchers	Yes 
Tax Credit Property	Yes 
Seniors Only	No 

## Accessibility

Counter/Vanity	Standard Height Counters and Vanity
Door/Faucet Handles	Unknown



## Kitchen & Bath Accessibility

Kitchen	Standard	↓ Comprehensive List ↓
Bathroom	Standard	↓ Comprehensive List ↓



## Safety

Lead-free / Passes Lead Safe Guidelines	Yes
<a href="#">↪ Learn More</a>	<a href="#">HUD Lead Paint Guidelines</a> <a href="#">Lead Paint Disclosure Rule</a>
Fire Safety	Smoke Detector



## Parking and Entry

Parking Type	Off Street
Allotted Parking Spaces	1
Parking in Front of Entrance	Yes
Additional Parking Comments	Parking Lot
Entry Location	From Outside
Unit Entry	Step(s)
Unit Minimum Door Width	Unknown
Other Entry Options	<ul style="list-style-type: none"> <li>• Standard Peephole</li> <li>• Deadbolt on Entry Door</li> <li>• Multi Story Unit</li> </ul>



## Nearby Services

Bus Stop	One Block
Playground	On Site
Shopping Venues	Five Blocks
Grocery Shopping	Five Blocks
Hospital	Within Two Miles
Pharmacy	Within Two Miles
Also Nearby	<ul style="list-style-type: none"> <li>• Sidewalks</li> <li>• Dumpsters</li> </ul>

## Comments

Qualifiers For Sliding Scale or Income Restriction

Income Restrictions: 2 persons: \$29,350 3  
persons: \$33,000 4 persons: \$36,650 5  
persons: \$39,600



We monitor listings, but if you see an issue, we want to hear from you!

[Read Scam Alert](#)

[Report Listing](#)

Under the [Federal Fair Housing Act of 1968](#), as amended in 1988, it is illegal to engage in discriminatory advertising based on race, color, religion, sex, familial status, disability, and national origin.

---

*Sponsored by:*



---

### HOUSING

[Affordability Calculator](#)  
[Find Housing](#)  
[List Housing](#)

### RESOURCES

[Resources](#)  
[Virginia Rent Relief Program - for Renters](#)  
[Virginia Rent Relief Program - for Landlords](#)  
[Modification Grants](#)  
[eBook: How to Be a Successful Renter](#)  
[Homelessness Prevention](#)  
[Veteran Resources](#)

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[ [XHTML](#) | [CSS](#) | [508](#) | [AAA](#) ]

This specific page meets the above validation levels.

# **Tab Y:**

Inducement Resolution for Tax Exempt Bonds

**N/A**

# **Tab Z:**

Documentation of team member's Diversity, Equity and Inclusion Designation or Veteran Owned Small Business certification

**N/A**

# **Tab AA:**

Priority Letter from Rural Development



**Rural Development**

February 25, 2026

Michelle O'Meara  
Branch Chief

Mr. Adam Stockmaster  
Powhatan Apartments James City LLC  
1375 Piccard Drive, Suite 375  
Rockville, MD 20850

Processing and  
Report Review  
Branch 1

Re: Powhatan Apartments James City LLC  
Tax Credit Support Letter

Production and  
Preservation Division

Dear Mr. Stockmaster,

Multifamily Housing

This letter is to confirm that you have informed the Rural Housing Service (RHS) of your intention to transfer the ownership of the property, Powhatan Apartments, from Powhatan I LP to Powhatan Apartments James City LLC, if it is determined eligible by RHS. We understand that you will apply for Federal Low-Income Housing Tax Credits from Virginia Housing in order to acquire and rehabilitate the property.

The RHS outstanding loan balance as of today is \$235,281.07. This loan balance is subject to change at the time of the transfer, and it will be set at new rates and terms. As of today, our current interest rate is 5.0%. Under current program parameters, this would be reduced to the below market 1.00% interest credit rate should all other components of the transaction be deemed acceptable by RHS. Based upon the economic useful life of the property, the term may be up to 30 years with an amortization period of up to 50 years.

Powhatan Apartments is a 48-unit USDA RD property with 46 units of project-based Rural Development rental assistance. Those units of rental assistance should transfer with the property to the new ownership entity for the duration of the compliance period.

The RHS also understands you intend to apply for a Section 538 Guaranteed Rural Rental Housing Loan through an approved lender as part of this transaction.

The above referenced project appears to be feasible, subject to the submission and review of a complete application, underwriting of the transaction, and completion and concurrence of all required due diligence items. At closing, the new borrower will be required to execute a new restricted use provision and the property will be required to operate in accordance with 7 CFR part 3560 - Direct Multi-Family Housing Loans and Grants.

If you have any questions regarding the above, please feel free to contact Megan Riley, Finance and Loan Analyst, at (910) 748-5571 or email at [megan.riley@usda.gov](mailto:megan.riley@usda.gov).

Sincerely,

MICHELLE  
O'MEARA

Digitally signed by MICHELLE  
O'MEARA  
Date: 2026.02.25 17:31:30  
-05'00'

Michelle O'Meara  
Branch Chief

# **TAB AB:**

Social Disadvantage Certification or Veteran  
Owned Small Business Certification

**N/A**