

ATTACHMENT F

PROPOSAL SUBMISSION CHECKLIST

I. Proposal Response Format

Proposals and all required additional documentation must be submitted electronically via email to CDDapplications@cityofmadison.com in the form of the completed application documents provided, converted to PDF. Submit one combined PDF of the application materials. The subject line must read **Affordable Rental Housing Development: Non-Tax Credit Application.**

The response to the RFP should be complete and comprehensive but succinct. Attachments of documents not specifically requested should not be submitted and will not be reviewed. Applicants are welcome to email a link to a dropbox for application download, however the City will not provide one.

II. Required Information and Content of Proposals

Proposals must include the following documents listed below to be considered complete and eligible for consideration. Include only required information, in one combined PDF, compiled in the following order.

1. **Cover Letter**
2. **RFP Application Form**
 - a. Available on [CDD Funding Opportunities](#) webpage
3. **RFP Budget Workbook**
 - a. Available on [CDD Funding Opportunities](#) webpage
4. **Completed Attachment E. Designation of Proprietary and Confidential Information** (if applicable)
5. **Financial Audits, Statements or Tax Returns**
 - a. Copy of most recent agency financial audit reports including the management letter and agency's response to the letter, if agency has annual certified audits completed

OR

Financial statements and a letter signed by the President of the Board of Directors stating that they approved the financial statement as prepared, if agency does not have annual audits completed

OR

For for-profit entities, a copy of last year's federal tax returns including all schedules, W2s and attachments for the Guarantor of the promissory note.

6. **Detailed Scope of Work (Rehab proposals only)**
7. **Energy Efficiency Technical Assistance Confirmation**
 - a. New Construction Proposals: Focus on Energy Income-Qualified Housing (IQH) Track - Initial Enrollment
 - b. Rehab Proposals (4+ units): Focus on Energy - Energy Advisory has been made. Confirmation e-mail with walk-through date has been submitted with this application.
 - c. Rehab Proposals (Co-op or SRO): Confirm that contact with Office of Sustainability has been made. Confirmation e-mail with has been submitted with this application.
8. **Tenant Selection Plan** consistent with Attachment C-1

III. Information Due at Supplemental Application Deadline

1. **Preliminary Site Plan (New construction and rehab requiring Land Use Approval Application)**
 - a. If unavailable at time of application, you must submit by time of Supplemental Application.
2. **Energy Efficiency Technical Assistance Obtained**

If unavailable at time of application, you must submit by time of Supplemental Application.

 - a. New Construction Proposals: Focus on Energy Income-Qualified Housing (IQH) Track - preliminary Bundle Requirements Document (BRD).
 - b. Rehab Proposals (4+ units): Focus on Energy - Energy Advisory and Energy Audit Report.
 - c. Rehab Proposals (Co-op or SRO): anticipate a question on the supplemental application describing the consultation and plan of action determined with the Office of Sustainability.