



Rental Assistance Demonstration Resource Desk

U.S. Department of Housing and Urban Development
Secretary Shaun Donovan

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PHA Libraries - PHA Name

Property Name

CHAP Issuance Date:

30 Days Following CHAP Issuance

Date Due: (CHAP Issuance + 30 Days)

HUD Review

1. Accepted Lender Engagement or Commitment Letter

This letter must include the HUD-specified language which states that the lender is aware of all relevant RAD policies including the RAD Use Agreement provisions and ongoing requirements in the case of foreclosure or bankruptcy. The letter must also include the proposed loan amount, key business terms of the loan, pro forma sources and uses, and pro forma stabilized cash flow.

2. Statement of Development Team Capacity

This statement must identify the proposed development team members, corresponding resumes, and evidence of recent successful experience in financing, developing, rehabilitating, constructing, owning and/or operating similar properties. Proposed teaming partner relationships must be described. Note: If multiple financing sources are being proposed, the development team must demonstrate they have experience with at least three mixed/multiple financing transactions.

UPLOAD DOCUMENTS

Milestone Document:



Drop-down Box: Accepted Lender Engagement / Commitment Letter / Statement of Development Team Capacity / Other

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Existing Documents

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PHA Libraries - PHA Name

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CHAP Issuance Date:

60 Days Following CHAP Issuance

Date Due: (CHAP Issuance + 60 Days)

HUD Review

1. The Significant Amendment to Annual/Five Year Plan

Non qualified PHAs must submit a significant amendment to the PHA's Five Year Plan and the Annual Plan. Qualified PHAs must submit a significant amendment to its Five Year Plan. Additionally, if the conversion will require changes to the PHA's Admissions and Continued Occupancy Plan (ACOP) and/or Section 8 Administrative Plan, these changes must be submitted with the significant amendment. In addition to the information already required by 24 CFR Part 903 for PHA Plan amendments, all PHAs must including the following information in their significant amendment: 1) description of units to be converted, including number of units, bedroom distribution, type of units; 2) any change in the number of units that is proposed as part of the conversion including de minimis unit reductions and unit reductions exempt from the de minimis cap; 3) any change in bedroom distribution of units that is proposed; 4) any change in policies that govern eligibility, admission, selection, waiting list preferences, and occupancy of units at the project after conversion; 5) If there will be a transfer of assistance at the time of conversion, it must also include the location and census tract of any converted units that will be transferred off-site . If some but not all of the assisted units will be transferred to another site at the time of conversion, it must also include a description of how the waiting list will be transferred and how households will be selected for the transfer.

2. Statement on PHAs decision To Convert Project to PBV or to PBRA and Voucher Agency Letter (If Applicable)

The PHA must indicate if it will convert to PBVs or to PBRA. If the PHA chooses PBVs and does not administer a Housing Choice Voucher program, the PHA must also submit a signed letter from a voucher agency which states its willingness to administer the PBVs.

UPLOAD DOCUMENTS

Milestone Document:

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Drop-down Box: Significant Amendment to Annual Plan / Significant Amendment to Five Year Plan / Statement on PHAs Decision to Convert Project / Other

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CHAP Issuance Date:

90 Days Following CHAP Issuance

Date Due: (CHAP Issuance + 90 Days)

HUD Review

1. PHA Certification that Industry-standard Due Diligence has been performed

This certification must indicate that all industry-standard due diligence has been performed and received by the lender and/or financing sources. A copy of the completed PCA report must be submitted with this certification.

Certification Template

UPLOAD DOCUMENTS

Milestone Document:



Drop-down Box: Certification that Due Diligence Performed / Completed PCA / Other

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PHA Libraries - PHA Name

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CHAP Issuance Date:

150 Days Following CHAP Issuance

Date Due: (CHAP Issuance + 150 Days)

HUD Review

1. Certification that PHA has applied for Firm Commitments of all proposed financing

This certification must indicate that the PHA has applied for Firm Commitments for all financing sources involved. Note: If FHA financing is involved, this certification must be in the form of a Firm Commitment Application to FHA.

Certification Template

UPLOAD DOCUMENTS

Milestone Document:



Drop-down Box: Certification Applied for Firm Commitments / Other

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CHAP Issuance Date:

180 Days Following CHAP Issuance Date Due: (CHAP Issuance + 180 Days) HUD Review

1. RAD Financing Plan

Item	DESCRIPTION	COMPLIANCE SATISFIED BY EITHER ATTACHING A FILE, CHECKING A BOX, OR ITEM IS NOT APPLICABLE		
		FILE ATTACHED	CHECK BOX	N/A
1	Type of Conversion	Note filename for upload if there's been a change in conversion type	Place an "X" by the appropriate selection	
2	Physical Condition Assessment (PCA)	Note filenames here for the narrative and the EXCEL tool		
3	Scope of Work	Note filenames here for upload		Place an "X" here if not applicable
4	Completed Environmental Review	Note filename here for upload		Place an "X" here if FHA-insured
5	Relocation Plan	Note filename here for upload		Place an "X" here if not applicable
6	Development Budget	Note filename here for upload		Place an "X" here if not applicable
7	Development Team	Note filename here for upload		Place an "X" here if not applicable
8	Proposed Financing	Note filename here for upload		Place an "X" here if not applicable

9	Operating Pro Forma	Note filename here for upload		
10	Market Study	Note filename here for upload		Place an "X" here if not applicable
11	Rehabilitation/ Construction Management	Note filename here for upload		Place an "X" here if not applicable

UPLOAD DOCUMENTS

Milestone Document:

← Drop-down Box: List of Financing Plan Pieces / Other

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Existing Documents

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270 Days Following CHAP Issuance Date Due: (CHAP Issuance + 270 Days) HUD Review

1. Return Executed RCC to HUD

The PHA has 30 calendar days from the date of issuance of the RCC to execute the RCC and return it to HUD.

UPLOAD DOCUMENTS

Milestone Document:



Drop-down Box: RCC / Other

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CHAP Issuance Date:

320 Days Following CHAP Issuance

Date Due: (CHAP Issuance + 320 Days)

HUD Review

1. Submit Firm Commitment for Financing or Equivalent

The PHA must submit evidence of firm commitment of financing or equivalent securing all sources of financing required to close the transaction.

UPLOAD DOCUMENTS

Milestone Document:



Drop-down Box: Firm Commitment / Other

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CHAP Issuance Date:

360 Days Following CHAP Issuance

Date Due: (CHAP Issuance + 360 Days)

HUD Review

1. Closing of RAD Transaction

Closing must include evidence of the following: 1) Release of the Public Housing Declaration of Trust; 2) Removal from the public housing ACC; 3) Execution of the new PBRA or PBV HAP contract; 4) Execution and Recordation of the RAD Use Agreement; 5) Closing of any bridge, construction, permanent debt, or equity financing; 6) Closing of the terms and conditions of the RCC; 7) Lender's Counsel opinion to HUD stating that the closing took place in accordance with the Notice and all other applicable requirements. Note: If the project is being financed with an FHA-insured loan, the MAP guide closing requirements will apply.

UPLOAD DOCUMENTS

Milestone Document:



Drop-down Box: PBRA or PBV HAP contract / RAD Use Agreement / Lender's Counsel Opinion / Other

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