



MassHousing Design & Construction Requirements

Last updated 03/25/2022

Summary

This document outlines the requirements, recommendations, and expectations of MassHousing's Design and Construction Department for each step of the loan process. In addition, please refer to the *MassHousing Environmental and Capital Needs Requirements*. MassHousing reserves the right to waive or alter the requirements set forth in this document.

Inter-Agency Design Requirements & Guidelines

Along with DHCD, MHP, and DND, MassHousing collaborated on the Inter-Agency Guidelines that are referenced in the Massachusetts Qualified Allocation Plan (QAP). While MassHousing encourages developers and their architects to incorporate the requirements and recommendations of the Inter-Agency Guidelines, MassHousing does not specifically require adherence to these Inter-Agency Guidelines. Any questions regarding the requirements of the other Agencies regarding the Inter-Agency Guidelines should be directed to the respective Agency.

MassHousing Design Requirements for all Multi-Family Loan Products

All multi-family developments receiving financing from MassHousing must meet the following design requirements:

- All projects must be well-planned and well-designed. This is defined as meeting all applicable codes and complying with best industry practices for design and planning, including design decisions that respect the surrounding community and adjacencies.
- Every project is required to have at least one (1) accessible unit. In addition, all projects are required to comply with all other state and federal laws in regard to accessibility. Other programs may impose additional accessible unit requirements.

MassHousing Design Recommendations for all Multi-Family Loan Products

MassHousing recognizes that there may be feasibility challenges to implementing certain design elements. As such, the following are not requirements, but rather strategies that MassHousing supports and encourages developments to explore integrating into their plans:

- Utilize innovative technologies and creative strategies to reduce total development and/or operating costs responsibly without compromises to quality.
- Incorporate universal access into designs where possible, including simple, intuitive, and flexible design solutions to reasonably accommodate individuals of diverse physical abilities, to minimize physical barriers and to consider accessibility features above code minimums.
- Consider sustainability measures, such as programs including LEED, the Living Building Challenge, Passive House, Energy Star, and/or Enterprise Green Communities to ensure energy-efficiency, resident comfort, resiliency, and reduced operating expenses for affordable housing developments. All projects should be aware of embedded and operating carbon dioxide reduction goals for 2030 and 2050 and designed responsibly.

MassHousing Design & Construction Submission Requirements

MassHousing's Design and Construction Department requires the following items at each stage in the loan closing process. **All documents to be submitted electronically as PDFs, no hard copies.**

(1) Design Review

For Construction and Permanent Loans:

- Construction drawings (One Stop Exhibit #17)
- Project Manual/ Specifications (One Stop Exhibit #17)
- Scope Narrative, prepared by Architect
- Sustainability Narrative including design and material decisions made to minimize embodied & operation carbon, prepared by the Architect
- Energy Model Narrative with Operating Cost Projections (where applicable)
- LEED Checklist (where applicable)
- Mechanical System Narrative, prepared by the Engineer
- Draft Construction Contract including all exhibits
- Draft Architect's Contract including all exhibits
- Soils Report (where applicable)
- Structural Report (where applicable)
- Developer/ Sponsor, Architect, and General Contractor profiles (One Stop Exhibits #25, #27, #29)
- Bonding Capacity of General Contractor
- Recent Resident Needs Assessment (applicable to existing projects only)
- Recent Accessibility Transition Plan (applicable to existing projects only)
- 504 ADA Checklist
- 3rd Party Capital Needs Assessment (CNA) commissioned by MassHousing (applicable to existing projects only)

(2) Initial Loan Closing

For Construction and Permanent Loans:

- 100% construction drawings, stamped by the architect
- Project Manual with Specifications, stamped by the architect
- MassHousing List of Contract Documents signed by the Borrower, Architect, and General Contractor (MassHousing Schedule 'A')
- Executed Construction Contract, including all Exhibits and MassHousing Rider (where applicable)
- Construction Management Plan
- Executed Architect's Contract, including all Exhibits
- Initial Construction Control Affidavits
- MassHousing Architect's Certification Letter
- Building Permit
- Payment and Performance Bond for General Contractor
- Lien Bond
- Notice to Proceed

(3) During Construction

MassHousing will assign a representative to review the progress of construction on a regular basis for developments receiving MassHousing construction and permanent loans. The representative will typically conduct visits that coincide with the site construction meetings and will observe and report on the project status. Participation in the construction meetings may be done virtually.

For Construction and Permanent Loans:

- Updated monthly construction schedule
- Site access for field rep for construction meeting attendance and inspections
- Access for stored material inspections
- Construction meeting minutes
- Change order (CO) and pending change order (PCO) log
- Monthly requisition AIA G702/ 703

(4) Final Loan Closing

For Construction and Permanent Loans:

- As-Built Plans prepared by the General Contractor and approved by the Architect
- Operation and Maintenance Manual (O & M) and warranty information prepared by the General Contractor and approved by the Architect
- Placed-in-service documentation (e.g., Certificate of Occupancy) issued by the BuildingInspector
- Final Construction Control Affidavits signed by the Design Team
- Certificate of Substantial Completion prepared and signed by the Architect
- Certificate of Final Completion prepared by the Architect
- Professional sign-off on any environmental scope and remediation closure
- Final Cost Certification prepared and signed by the General Contractor
- Radon testing performed by a Qualified Radon Professional in accordance with EPA, ASTM, and all State and Federal regulations

(End of Design & Construction Department Requirements)