

## Prioritization Tool for Affordable Housing Incentives

**Applicant/Developer Name:** Housing Trust Group, LLC / HTG Murdock, LLC

**Project/Development Name:** Murdock Square

**Date of Application:** 06.05.2026 (received)

**Date of Review:** 06.15.2026

**Reviewer:** Rich Gromalski, Human Services; Shaun Cullinan, Community Development; Sandra Weaver, Utilities

**Incentives/Fee Subsidies/Funding Requested:**

☒ Expedited Permitting     ☐ Impact Fee Waiver     ☐ Land Donation     ☐ SHIP/HHR Funding  
☐ Utility Connection Fees     ☐ DRI Fees     ☐ Environmental Fees     ☒ \*LGAO Local Government Contribution

### TIER I - Designation of Affordable Housing for Expedited Permitting and Waiver of Impact Fees on Affordable Units

| Type of Housing: (select one)                  |    | Rev. 1 | Rev. 2 | Rev. 3 | Average |
|------------------------------------------------|----|--------|--------|--------|---------|
| Multi-Family (51 - 100 affordable units)       | 15 | 15     | 15     | 15     |         |
| Multi-Family (2 - 50 affordable units)         | 10 |        |        |        |         |
| Single Family Rental (Non-profit/CLT)          | 5  |        |        |        |         |
| * Subsidized Single Family Ownership           | 10 |        |        |        |         |
| Special Needs/Supported Living                 | 10 |        |        |        |         |
| <b>* Average Resident Income: (select one)</b> |    |        |        |        |         |
| Below 30% AMI                                  | 15 |        |        |        |         |
| Below 60% AMI                                  | 10 |        |        |        |         |
| 60-80% AMI                                     | 5  | 5      | 5      | 5      |         |
| <b>Additional Consideration:</b>               |    |        |        |        |         |
| * Mixed Income (market rate + affordable)      | 5  |        |        |        |         |
| Non-profit developer or Community Land Trust   | 5  |        |        |        |         |
| <b>Total points for Tier I</b>                 |    | 20     | 20     | 20     | 20      |

### TIER II - Eligibility Criteria for Additional Incentives, Fee Subsidies, and/or Funding

**\* Term of Affordability: (select one)**

|                      |    |    |    |    |  |
|----------------------|----|----|----|----|--|
| Perpetuity           | 20 | 20 | 20 | 20 |  |
| 50 years             | 15 |    |    |    |  |
| 21 - 49 years        | 10 |    |    |    |  |
| 20 years             | 5  |    |    |    |  |
| Tied to sale of unit | 3  |    |    |    |  |

# Charlotte HOME

Rev. 02/11/2025

|                                                                                                                                                                                                                                                                                                                      |         |    |    |    |    |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|----|----|----|----|
| <b>Capacity of Builder/Developer: (select all that apply)</b>                                                                                                                                                                                                                                                        |         |    |    |    |    |
| Financial capacity and past experience                                                                                                                                                                                                                                                                               | up to 5 | 5  | 5  | 5  |    |
| Plan for maintenance and continued affordability of subject property, including certification of resident income eligibility                                                                                                                                                                                         | up to 5 | 5  | 5  | 5  |    |
| <b>Project Readiness: (select all that apply)</b>                                                                                                                                                                                                                                                                    |         |    |    |    |    |
| Site Control                                                                                                                                                                                                                                                                                                         | 5       | 5  | 5  | 5  |    |
| Property Zoned for Proposed Use                                                                                                                                                                                                                                                                                      | 2       | 2  | 2  | 2  |    |
| Construction to begin with 180 days                                                                                                                                                                                                                                                                                  | 3       | 0  | 0  | 0  |    |
| <b>Leveraged Investment: (select all that apply)</b>                                                                                                                                                                                                                                                                 |         |    |    |    |    |
| FHFC RFA or Tax Credit Project                                                                                                                                                                                                                                                                                       | 5       | 5  | 5  | 5  |    |
| Demonstrated * Return on Investment (ROI) to the County                                                                                                                                                                                                                                                              | up to 5 | 5  | 5  | 5  |    |
| <b>Total points for Tier II</b>                                                                                                                                                                                                                                                                                      |         | 47 | 47 | 47 | 47 |
| <b>TIER III - Eligibility Criteria for Additional Incentives</b>                                                                                                                                                                                                                                                     |         |    |    |    |    |
| <b>Additional Considerations: (select all that apply)</b>                                                                                                                                                                                                                                                            |         |    |    |    |    |
| Case Management                                                                                                                                                                                                                                                                                                      | up to 5 | 5  | 5  | 5  |    |
| Educational Programs (Financial Literacy/Employment)                                                                                                                                                                                                                                                                 | up to 5 | 5  | 5  | 5  |    |
| Proximity to medical, employment, shopping                                                                                                                                                                                                                                                                           | up to 5 | 5  | 5  | 5  |    |
| <b>Total points for Tier III</b>                                                                                                                                                                                                                                                                                     |         | 15 | 15 | 15 | 15 |
| <b>TIER IV - Bonus</b>                                                                                                                                                                                                                                                                                               |         |    |    |    |    |
| Project includes > 100 affordable units                                                                                                                                                                                                                                                                              | 15      |    |    |    |    |
| <b>Total points for Tier IV</b>                                                                                                                                                                                                                                                                                      |         | 0  | 0  | 0  | 0  |
| <b>Total points for Tiers I, II, III and IV</b>                                                                                                                                                                                                                                                                      |         | 82 | 82 | 82 | 82 |
| <b>Recommendation of Review Team</b>                                                                                                                                                                                                                                                                                 |         |    |    |    |    |
| Recommend Tier I incentives: Expedited Permitting and Impact Fee Waiver, contingent upon award of Local Government Contribution (LGC) and FHFC RFA 2026-201. Further recommend AHAC determine local preference for recommendation to BCC for LGC of \$340,000 LGAO loan, contingent upon award of FHFC RFA 2026-201. |         |    |    |    |    |
| * See Policy - Definitions                                                                                                                                                                                                                                                                                           |         |    |    |    |    |