

HTC Applicant Self-Score Sheet

Applicant name: _____

Project name: _____

Project address: _____

A. Overall Size and Quality of the Project – Total Points Available: 35

A1. Leveraged Investment: Weighted preference for applicants who leverage additional project investment. This measure is based on the Leveraged Investment Ratio:

$$\text{Total Project Investment} \div \text{Tax Credit Requested} = \text{Leveraged Investment Ratio}$$

Leveraged Investment	Points Available	Points Scored	DED Use Only
More than 10.0	5		
8.1 to 10.0	4		
6.1 to 8.0	3		
5.1 to 6.0	2		
4.1 to 5.0	1		
4.0 or less	0		

A2. Number of Net New Jobs to the State to be Created by the Project: Only non-construction jobs that are new to the State and not relocated from elsewhere in the State may be counted.

Number of Net New Jobs to the State to be Created by the Project	Points Available	Points Scored	DED Use Only
Greater than 100 Net New Jobs	5		
81-100 Net New Jobs	4		
61-80 Net New Jobs	3		
41-60 Net New Jobs	2		
21-40 Net New Jobs	1		
20 or Less Net New Jobs	0		

A3. Average Wage for the New Jobs to be Created by the Project: Research the project county's average wage for the new jobs to be created through the following web site and attach result.

<https://meric.mo.gov/data/county-average-wages>

County Average Wage for the New Jobs to be Created by the Project	Points Available	Points Scored	DED Use Only
Equal to or Greater than County Average Wage	5		
95% of County Average Wage	4		
90% of County Average Wage	3		
85% of County Average Wage	2		
80% of County Average Wage	1		
Less than 80% of County Average Wage	0		

A4. Potential Multiplier Effect of the Project Based on the Project’s Industry: Multipliers as defined by the IMPLAN model and based on the majority activity in the building. Refer to below chart of IMPLAN Job Multipliers.

Potential Multiplier Effect of the Project Based on the Project’s Industry	Points Available	Points Scored	DED Use Only
2.50 or More	5		
1.80 – 2.49	4		
1.50 – 1.79	3		
1.30 – 1.49	2		
Less than 1.30	1		

IMPLAN Job Multipliers		
Sector	NAICS	Job Multiplier
<i>Utilities</i>	22	4.03
<i>Information</i>	51	3.64
<i>Manufacturing</i>	31-33	2.89
<i>Management of Companies</i>	55	2.54
<i>Wholesale Trade</i>	42	2.21
<i>Real Estate and Rental</i>	53	2.20
<i>Finance and Insurance</i>	52	2.02
<i>Professional, Scientific & Tech. Services</i>	54	1.92
<i>Construction</i>	23	1.79
<i>Transportation and Warehousing</i>	48-49	1.77
<i>Mining</i>	21	1.68
<i>Health and Social Services</i>	62	1.55
<i>Arts, Entertainment & Recreation</i>	71	1.49
<i>Educational Services</i>	61	1.41
<i>Administrative & Waste Services</i>	56	1.40
<i>Retail Trade</i>	44	1.39
<i>Accommodation & Food Services</i>	72	1.28
<i>Agriculture, Forestry, Fishing & Hunting</i>	11	1.28

2016 multipliers represent rounded statewide estimates and are for reference only. Multipliers for individual projects will vary based on region, time period, detailed industry, and project information.

A5. Financing Committed: Weighted preference for applicants who have financing and/or equity in place and are ready to begin development immediately.

Financing Committed	Points Available	Points Scored	DED Use Only
100% of financing in place	15		
90% of financing in place	13		
80% of financing in place	11		
70% of financing in place	9		
60% of financing in place	7		
50% of financing in place	5		
40% of financing in place	3		
Less than 40% of financing in place	1		

	Total Points Scored	DED Use Only
Overall Size and Quality of Project		

B. Level of Economic Distress – Total Points Available: 30

B1. The Project Census Tract’s Designation as a Federal Opportunity Zone: Research the project census tract’s designation as a Federal Opportunity Zone through the following web site and attach map of result. https://www.cims.cdfifund.gov/preparation/?config=config_nmtc.xml

The Project Census Tract’s Designation as a Federal Opportunity Zone	Points Available	Points Scored	DED Use Only
Yes	10		
No	0		

B2. The Project Census Tract’s Designation as a Qualified Census Tract: Research the project census tract’s designation as a Qualified Census Tract though the following web site and attach map of result. <https://mogov.maps.arcgis.com/apps/webappviewer/index.html?id=893ffd30139149a68ef434f3557c897b>

The Project Census Tract’s Designation as a Qualified Census Tract	Points Available	Points Scored	DED Use Only
Yes	3		
No	0		

B3. The Project County’s Level of Unemployment: Weighted preference for projects that will create economic growth in distressed areas. This measure uses the average unemployment rate of the county during the year currently available preceding the start of the application period. Reference Appendix B3 of the score guide for average county unemployment rates, calculated by Missouri Economic Research Information Center (MERIC). Compare the average county unemployment rate to the average state unemployment rate. The Missouri average unemployment rate for 2018 was 3.2%.

The Project County’s Level of Unemployment	Points Available	Points Scored	DED Use Only
Unemployment rate greater than 2 percentage points above Missouri rate	4		
Unemployment rate between 1.1 and 2.0 percentage points above Missouri rate	3		
Unemployment rate between 1.0 percentage point below and 1.0 percentage point above Missouri rate	2		
Unemployment rate between 1.1 and 2.0 percentage points below Missouri rate	1		
Unemployment rate more than 2.0 percentage points below Missouri rate	0		

B. Level of Economic Distress – Total Points Available: 30

B4. The Project Census Tract’s Overall Poverty Rate: Weighted preference for projects that will create economic growth in distressed areas. This measure uses the poverty rate of the census tract.

Research the poverty rate in the census tract by using the U.S. Census Bureau’s American Community Survey. <https://censusreporter.org/>

The Project Census Tract’s Overall Poverty Rate	Points Available	Points Scored	DED Use Only
50% or greater poverty	3		
40% or greater poverty	2		
30% or greater poverty	1		
Less than 30% poverty	0		

B5. Vacant Property: Weighted preference for buildings that are underutilized or not occupied and will generate a greater catalytic impact upon completion of their rehabilitation. Vacancy is measured over a one-year period ending on the date on which the application must be submitted.

Vacant Property	Points Available	Points Scored	DED Use Only
95% - 100% vacant	10		
85 - 94.99% vacant	9		
70 - 84.99% vacant	8		
55 - 69.99% vacant	7		
40 - 54.99% vacant	5		
25 - 39.99% vacant	4		
10 - 24.99% vacant	2		
Less than 10% vacant	1		

	Total Points Scored	DED Use Only
Level of Economic Distress		

C. Net Fiscal Benefit – Total Points Available: 25

C1. Net Fiscal Benefit: Weighted preference for projects with the greatest return on investment (ROI). DED Business and Community Services will conduct a cost-benefit analysis based on the data provided in this section of the preliminary application and award up to 25 points based on the ROI from the project to State and local governments. These points are not self-scored by the applicant.

State Cost-Benefit Analysis	Points Available	DED Use Only
ROI of 2.0 or more over 10 years	15	
ROI between .76 and 1.99 over 10 years	10	
ROI between .25 and .75 over 10 years	5	
ROI between .10 and .24 over 10 years	2	
ROI less than .10 over 10 years	0	

Local Cost-Benefit Analysis	Points Available	DED Use Only
No Tax Abatement	10	
ROI of 2.0 or more over 10 years	8	
ROI between 1.0 and 1.99 over 10 years	6	
ROI between .50 and .99 over 10 years	4	
ROI between .10 and .49 over 10 years	2	
100 % Tax Abatement	0	

Total Points Available	25
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D. Input from Local Elected Officials – Total Points Available: 10

D1. Local Participation and Support: Weighted preference for applicants who have received an indication of support or firm commitment of financial incentives from their local jurisdiction (municipality or township) or county.

Local Participation and Support	Points Available	Points Scored	DED Use Only
Firm Financial Commitment AND Written Indication of Local Support	10		
Firm Financial Commitment	6		
Written Indication of Local Support	2		
No Indication of Local Support	0		

	Total Points Scored	DED Use Only
Input from Local Elected Officials		

Total Overall Points Available	100	DED Use Only
Total Overall Points Scored		



Exhibit A3
Average Wage for Estimated New Job Creation

HISTORIC PRESERVATION TAX CREDIT PROGRAM

THE TOTAL NUMBER OF NEW JOBS TO BE CREATED BY THE PROJECT (REPORT ONLY FULL TIME JOBS THAT ARE NEW TO THE STATE OF MISSOURI, DO NOT INCLUDE RELOCATED JOBS OR CONSTRUCTION JOBS DURING THE REHABILITATION)

COMPLETE THE TABLE BELOW FOR EACH JOB TYPE, NAICS CODE, NUMBER OF NEW JOBS, AND TOTAL ANNUAL WAGES FOR EACH JOB TYPE

JOB TYPE	NAICS	NUMBER OF NEW JOBS	TOTAL ANNUAL WAGES
1.			AMOUNT
2.			AMOUNT
3.			AMOUNT
4.			AMOUNT
5.			AMOUNT
6.			AMOUNT
7.			AMOUNT
8.			AMOUNT
9.			AMOUNT
10.			AMOUNT
TOTAL			TOTAL AMOUNT

Total number of new jobs reported in this exhibit must match the total number of new jobs reported in Section 8 of Preliminary Application form 1, part 1A

TOTAL NUMBER OF ESTIMATED NEW JOBS _____ JOBS

TOTAL ANNUAL WAGES OF ESTIMATED NEW JOBS \$ _____

AVERAGE ANNUAL WAGES FOR ESTIMATED NEW JOBS \$ _____

COUNTY AVERAGE ANNUAL WAGES WHERE THE PROJECT IS LOCATED \$ _____

AVERAGE ANNUAL WAGES FOR ESTIMATED NEW JOBS
COUNTY AVERAGE ANNUAL WAGES = _____



Exhibit A5
Financing Committed

HISTORIC PRESERVATION TAX CREDIT PROGRAM

THE AMOUNT OF OVERALL PROJECT FINANCING THAT THE APPLICANT HAS SECURED FIRM COMMITMENTS PRIOR TO SUBMITTING PRELIMINARY APPLICATION TO DED

COMPLETE THE TABLE BELOW WITH EACH TYPE OF COMMITTED FUNDING SOURCE (E.G. BANK LOANS, DEVELOPER EQUITY, LOCAL INCENTIVES) AND THE AMOUNT EACH SOURCE WILL PROVIDE

HISTORIC PRESERVATION TAX CREDITS:
 MISSOURI HISTORIC PRESERVATION TAX CREDIT \$
 FEDERAL HISTORIC PRESERVATION TAX CREDIT \$

SOURCES 1:	DESCRIPTION OF SOURCE	AMOUNT \$
SOURCES 2:	DESCRIPTION OF SOURCE	AMOUNT \$
SOURCES 3:	DESCRIPTION OF SOURCE	AMOUNT \$
SOURCES 4:	DESCRIPTION OF SOURCE	AMOUNT \$
SOURCES 5:	DESCRIPTION OF SOURCE	AMOUNT \$
SOURCES 6:	DESCRIPTION OF SOURCE	AMOUNT \$

PROVIDE SUPPORTING DOCUMENTATION FOR EACH SOURCE OF FUND LISTED ABOVE. See the Self-Scoring Guide for acceptable form of documentation.

TOTAL FINANCING AMOUNT COMMITTED \$
REMAINING INVESTMENT TO COMPLETE THE PROJECT \$
PERCENTAGE OF FINANCING COMMITTED _____%