

**How to Complete the
Intended Methods Worksheet**

Request for Proposals and
Housing Tax Credits

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HOUSING

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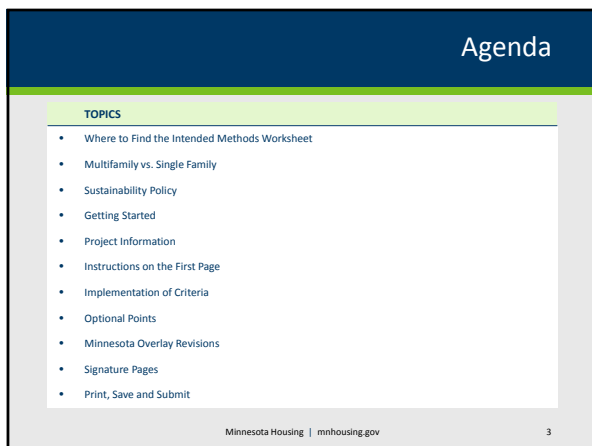
m MINNESOTA
HOUSING

Our Mission

Housing is the foundation for success, so we collaborate with individuals, communities and partners to create, preserve and finance affordable housing.

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Agenda

TOPICS

- Where to Find the Intended Methods Worksheet
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Where to Find the Intended Methods Worksheet

The Intended Methods Worksheet (IMW) is a Microsoft Excel document available on Minnesota Housing's Building Standards webpage.

[Building Standards](#)

Sustainability

- [MN Overlay & Guide to the Enterprise Green Communities Criteria](#)
- [Previous Years MN Overlay & Guide to Green Communities Criteria - For previously selected developments](#)
- [Multifamily Intended Methods Worksheet](#)
- [Single Family Intended Methods Worksheet](#)
- [Waiver Request - EGCC and MN Overlay](#)

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Multifamily vs. Single Family

Chapter 2 of the Minnesota Overlay to Enterprise Green Communities Criteria defines Multifamily and Single Family by funding source.

2.01 Definitions of Project Type as set by Funding Source


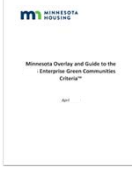

Multifamily (MF) is defined as any project or Dwelling Unit (DU) where the occupant(s) are renters and do not own the property. Multifamily projects may include single family homes, duplexes, townhomes, buildings with elevators, multi-storied buildings, etc. and are generally administered by Minnesota Housing's Multifamily Division. Contact Minnesota Housing's [Staff Architects](#) for clarifications, if needed.

Single Family (SF) is defined as single family homes, duplexes and townhomes where the occupant owns the dwelling and the project is administered through Minnesota Housing's Single Family Division.

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Sustainability Policy

The Intended Methods Worksheet (IMW) is not a stand-alone document. It is a tool to document compliance with our Sustainability Policy made up of the Minnesota Overlay and the Enterprise Green Communities Criteria.

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All of these documents are available on our [Building Standards](#) webpage.

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Getting Started

1. Open the IMW Excel document
2. Choose "Save-as" to save the document to your computer
3. You will update this document three times during each of the three phases
4. Indicate the applicable Submittal Phase
5. Indicate the applicable Construction Type

Multifamily - Intended Methods Worksheet
MN Overlay to the Enterprise Green Communities Criteria

Submittal Phase:	Construction Type:
<input checked="" type="checkbox"/> Application	<input checked="" type="checkbox"/> New Construction
<input type="checkbox"/> Loan Commitment/ Loan Closing	<input type="checkbox"/> Substantial/ Gut Rehab
<input type="checkbox"/> End of Construction/ Construction Close-out	<input type="checkbox"/> Moderate Rehab

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Project Information

The project information must be accurate.

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Project Name: ABC Apartments
Location (City): Duluth
Developer/Owner/Borrower: XYZ Development
Architect of Record: Good Architects
General Contractor: Sturdy Construction
HERS Rater/Energy Consult: John Doe of ACME Energy Consultants
This Form Prepared By: Jane Doe of Good Architects
Date Last Updated: April 15, 20

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Read Instructions on First Page

1. Multifamily New Construction projects must include all applicable "Mandatory" Criteria and at least (35) Optional Criteria Points.
2. Multifamily Substantial, Gut, and Moderate Rehab projects must include all applicable "Mandatory" Criteria and at least (30) Optional Criteria Points.
3. The information on this form must reference and reconcile with the 2015 Enterprise Green Communities Criteria as amended with the current/applicable version of the MN Overlay.
4. For developments with scattered sites, different construction types or a combination of low rise and mid/high rise buildings - a separate Intended Methods & Certification form must be provided.
5. Items with text in red as such are MN Overlay items.
6. The "How Will Criteria Be Implemented?" column must be completed for all Mandatory and selected Optional Point Criteria.
7. This document is formatted to be printed in a Landscape (Horizontal) Letter (11"x8.5") page format.

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Mandatory Criteria

Mandatory indicated here with an "M." Must be checked for all Mandatory Criteria.

CR	M/O	Criteria Title	Criteria Description	How Will Criteria Be Implemented? And, where in the plans, specifications, or other place will compliance be documented?	Intent to Comply				
					Yes	No	N/A	WR	OP
1	M	Goal Setting (Mandatory for all)	Develop an integrative design process that works best for your project team and mission, its mission, goals of the project and the expected intended outcomes from addressing those goals. 1. A statement of the overall green development goals of the project and the expected intended outcomes from addressing those goals. 2. A summary of the integrative process that was used to select the green building strategies, systems and materials that will be incorporated into the project. 3. A description of how progress and success against those goals will be measured throughout the completion of design, construction and operation to ensure that the green features are included and correctly installed.	The team consisting of developer, architect, general contractor, HERS Rater, etc will conduct a sustainability design charrette. The results and outcomes from this charrette will be used to identify compliance with mandatory criteria and set goals for compliance with selected Optional Points. Compliance will be documented with meeting notes disseminated to all in attendance.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

This column must be completed. Notice, the Optional Point "OP" column is shaded gray when points are not available.

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Optional Criteria

Number of available, optional points indicated here. Must be checked for all criteria with selected optional points.

CR	M/O	Criteria Title	Criteria Description	How Will Criteria Be Implemented? And, where in the plans, specifications, or other place will compliance be documented?	Intent to Comply				
					Yes	No	N/A	WR	OP
2	O	Preservation of and Access to Open Space	Set aside a percentage of non-covered open space for use by all residents. 20% (2 points), 30% (3 points), 40% + written statement of preservation/conversion policy for set aside land (3 points).	40% of the site will be set as non-covered open space for use by the residents. See attached civil site plan showing square foot calculations to support these optional points.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

This column must be completed if these criteria are selected for optional points. Indicate the number of Optional Points "OP" being claimed in this column.

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How Will Criteria Be Implemented?

This column must be completed for all criteria. Must be checked for all criteria.

How Will Criteria Be Implemented? And, where in the plans, specifications, or other place will compliance be documented?	Intent to Comply				
	Yes	No	N/A	WR	OP
The team consisting of developer, architect, general contractor, HERS Rater, etc will conduct a sustainability design charrette. The results and outcomes from this charrette will be used to identify compliance with mandatory criteria and set goals for compliance with selected Optional Points. Compliance will be documented with meeting notes disseminated to all in attendance.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Optional Points

Intent to Comply				
Yes	No	N/A	WR	OP
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12

Indicate number of Optional Points selected. Note that the template default is 0 points.

y 1 Selected Optional Points	38
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Optional Points will automatically subtotal for each of the eight categories and for the final total at the end.

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Minnesota (MN) Overlay Revisions

5. Items with text in red as such as MN Overlay items.

1.2a	M or J Resident Health and Wellbeing: Design for Health (Mandatory for NC) (2 Optional Points for Sub and Main Areas)	Identify potential resident health factors and design your project to address resident health and well-being by using the matrix provided on pages 12 and 23 of the 2015 EGCC document.	r	r	r	2
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Signature Pages

Complete, sign and date the applicable certification section for **each** submittal phase **at the time of submission** for the applicable phase.

Phase 1	Intent to Comply Certificate	Initial Application Phase
Phase 2	Smartest Document Compliance Certificate	Open Construction/Closeout (Mandatory Phase)
Phase 3	Final Certificate	Final Construction/Closeout (Mandatory Phase)


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Save, Print and Submit

Save and print to a pdf in an 8 1/2" x 11" landscape/horizontal format.

Submit (upload to the Multifamily Customer Portal) both the Excel document and the PDF version (with signature pages).

Incorporate into the project manual/specifications.



The screenshot shows a form titled "Multifamily - Intended Methods Worksheet" with a header for "MINNESOTA HOUSING". It includes a "Project Name" field, a "Project Location" field, and a "Project Type" dropdown menu. There are several checkboxes for "Intended Methods" such as "Green Building", "Energy Efficient", "Water Conservation", "Indoor Air Quality", "Accessibility", "Smart Home", "Community Land Use", "Sustainable Site", and "Resilient Design". Below the form is a table with columns for "Intentional Design Category" and "Intentional Design Description".

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Thank you!

Questions? Contact a Minnesota Housing Architect:

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