

**Capital Improvements  
Joint Bond Review Committee**

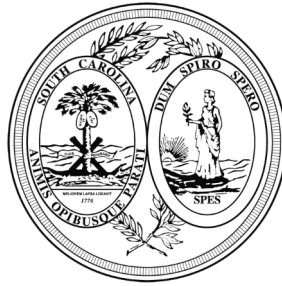
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**MILLER A. SMOAK**  
ADMINISTRATIVE ASSISTANT  
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**JOINT BOND REVIEW COMMITTEE MEETING**

December 2, 2025 – 1:00 p.m.  
105 Gressette Building

**AGENDA**

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**Capital Improvements  
Joint Bond Review Committee**

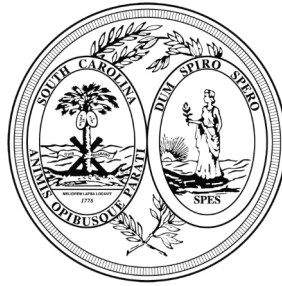
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**JOINT BOND REVIEW COMMITTEE MEETING**

December 2, 2025 – 1:00 p.m.  
105 Gressette Building  
(continued)

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AGENCY: South Carolina Public Service Authority

SUBJECT: Financing Proposal

Section 58-31-240(A)(1) of the SC Code of Laws provides that, prior to issuing any (1) bonds, (2) notes, or (3) other indebtedness, including any refinancing that does not achieve a savings in total debt service, the Joint Bond Review Committee must approve, reject, or modify the issuance by the South Carolina Public Service Authority. This section does not apply to the issuance of short-term or revolving-credit debt for the management of day-to-day operations and financing needs.

The Authority requests approval of the Committee for the issuance of not exceeding \$700,000,000 par of South Carolina Public Service Authority Revenue Obligation Bonds to finance planned capital expenditures related to generation resources including the Canadys Natural Gas Joint Build with Dominion Energy South Carolina (DESC), Winyah Simple Cycle Gas Turbines, and the Authority's existing Rainey Natural Gas facility. The bonds will be issued in one or more series of tax-exempt or taxable bonds through 2027.<sup>1</sup>

Capital Projects to be Funded. Due to certain electric system demands<sup>2</sup> in the state, the Authority projects a capacity deficit of approximately 2,000 megawatts by the mid 2030's. The Authority plans to address these demands through upgrading and extending the life of existing resources, constructing new natural gas generating resources, and pursuing renewable resources, and power purchase agreements.

Proceeds of the proposed bonds are expected to support \$685,000,000 of expenditures toward the following generation resource projects:

Canadys Natural Gas Joint Build	\$120,000,000
Winyah Aeroderivative Combustion Turbines	\$293,000,000
<u>Rainey Conversion &amp; Upgrades</u>	<u>\$272,000,000</u>
<b>Total Bond Par Amount</b>	<b>\$685,000,000<sup>3</sup></b>

The Candays Station Project will be an approximately 2,200-megawatt state of the art Natural Gas Combined Cycles facility with DESC on a tract of land adjacent to the Edisto River in Colleton County. On October 31, 2025, DESC and the Authority signed an agreement on the joint project to comprise three 1x1 combined cycle natural gas units with a commercial operation date planned for mid-2033. Each party will own 50% of the units and the output. The Authority and DESC expect to file an application for a Certificate of Public Convenience and Necessity before the end

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<sup>1</sup> The Authority expects to issue the bonds in one or more transactions through 2027, depending on market conditions and updated cash flows. In previous years the Authority has utilized its Bank Credit Facilities to temporarily fund a portion of its Board-approved capital improvement program prior to issuing long-term bonds. The Authority would like to continue this practice when funding these projected construction expenditures to allow the Authority to navigate market conditions and maximize savings while coordinating the timing of potential refunding.

<sup>2</sup> In 2025, the Authority completed its annual assessment of demands for electric system investments in the state and identified several trends driving demands: population growth, reindustrialization in the United States, artificial intelligence and data center power demands, retirement of existing generating assets, environmental regulations, supply chain challenges creating long lead times and inflationary uncertainty, and extended and uncertain timeframes due to permitting and regulatory requirements.

<sup>3</sup> All projects are consistent with the 2025 Integrated Resource Plan.

of 2025. Both groups are also preparing to apply for certain air, water, and land permits. The total project cost estimate is \$5 billion with the Authority's portion expected to be half. As of November 10, 2025, the Authority has recorded less than \$2 million in expenditures. The majority of \$120 million requested for Committee approval will cover equipment purchases and site preparation. The Authority's Integrated Resource Plan ("IRP") supports this project as the most economic and reliable option available to customers, and this project will provide additional natural gas capacity in South Carolina for further economic development.

The Winyah Generation Station located in Georgetown County will have two aeroderivative combustion turbine LM6000 units installed. The units will provide approximately 108 MW of peaking capacity with a target commercial operation date of December 2027. Each combustion turbine will produce 40-60 MW and can run on fuel oil or natural gas. The \$293 million currently requested Committee approval will fund the total project cost.

The Rainey Generating Station combustion turbines 2A and 2B located in Anderson County will be converted to a combined-cycle configuration through the installation of a Heat Recovery Steam Generator. The project is expected to add approximately 165 MW of incremental summer capacity with a target commercial operation date of January 23, 2028. The Authority is also upgrading the Rainey combustion turbines 3/4/5 as well as the Rainey Power Block 1 combined cycle. The \$272 million requested will fund the remaining capital expenditures associated with these projects.<sup>4</sup> The conversion and upgrades will add over 250 MW of capacity to the system by 2028.

Pledge of Revenues to Pay Bonds and Impact on Total Debt Service. The proposed bonds will be issued pursuant to the authority of and in full compliance with the Authority's Master Resolution, adopted by its Board on April 26, 1999, as amended and supplemented from time to time.<sup>5</sup> The Master Resolution will be supplemented by one or more series and supplemental resolutions authorizing the proposed bonds.

The proposed bonds will be payable solely from, and secured by a lien upon and pledge of the Revenues, as that term is defined in the Master Resolution, on a parity basis with the lien and pledge securing Revenue Obligations issued pursuant to the Revenue Obligation Resolution, senior to (a) payments required to be made from or retained in the Revenue Fund to pay Operation and Maintenance Expenses, and (b) payments into the Capital Improvement Fund.

The Revenue Obligations, including the proposed bonds, will neither constitute an indebtedness of the State, nor of any of its political subdivisions. Neither the State nor any of its political subdivisions are liable for the Revenue Obligations, nor are they payable from any funds other than the Revenues of the Authority pledged to their payment.

The proposed bonds are expected to mature from December 1, 2028, through December 1, 2062. The Authority expects issuance of the proposed bonds to result in an increase over existing annual debt service of approximately \$45 million. Estimated debt service requirements on all Revenue Obligations of the Authority both prior to and after the issuance of the proposed bonds is attached

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<sup>4</sup> \$201 million related to the Heat Recovery Steam Generator and \$71 million for the other capacity enhancements.

<sup>5</sup> The Master Resolution, as so amended and supplemented, is referred to as the "Revenue Obligation Resolution."



as Exhibit A.<sup>6</sup> The exhibit also reflects the Authority's outstanding debt balances for the Authority's Commercial Paper and Revolving Credit Agreement loans.

Based on current financial projections, the Authority anticipates revenues sufficient to produce debt service coverage in the range of 1.37x to 1.44x from 2026-2028. Outstanding debt as of November 5, 2025, is \$8.4 billion and would increase by approximately \$700 million as a result of the proposed bonds. Offsetting this increase would be a decrease in outstanding debt as scheduled principal payments on existing debt are made. The Authority reports that debt to capitalization ratio is expected to stay steady at 78-79% through 2028. While cash-on-hand levels have declined during the rate freeze period, the Authority presently and foreseeably has sufficient bank credit facility capacity to provide sufficient liquidity. Based on current bank credit facility capacity, Days Cash on Hand is expected to range from 102-120 days during the 2026-2028 period, while Days Liquidity is expected to be in the range of 311-400 days during the same period.

The Authority is monitoring market conditions and may refund callable bonds if targeted savings are reached. Currently, the Authority has approximately \$1.2 billion tax-exempt bonds that are, or will become, callable within the next two years.

#### COMMITTEE ACTION:

Review and approve, reject, or modify the South Carolina Public Service Authority's request to issue not exceeding \$700,000,000 par of South Carolina Public Service Authority Revenue Obligation Bonds, for the purposes described herein.

#### ATTACHMENTS:

1. Letter dated November 12, 2025, of Ms. Tami Wilson, Vice President & Chief Financial Officer, Santee Cooper.
2. Supporting Exhibits.

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<sup>6</sup> Exhibit A reflects issuing the entire \$700 million par of 2026/2027 Improvement Bonds in 2026, using interest rates as of November 4, 2025, and current assumptions for portions of the bonds to be issued as tax-exempt or taxable debt. The Authority may elect, however, to issue the bonds in one or more transactions through 2027, depending on market conditions and updated cash flows.



**Tami Wilson**

Vice President & Chief Financial Officer

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November 12, 2025

The Honorable Harvey S. Peeler, Jr. Chairman  
Joint Bond Review Committee  
South Carolina Senate  
111 Gressette Building  
Columbia, SC 29201

Re: Request for approval of South Carolina Public Service Authority to issue Revenue Obligation Bonds not exceeding \$700,000,000 par ("2026/2027 Improvement Bonds").

Dear Chairman Peeler,

The South Carolina Public Service Authority ("the Authority") requests that the Joint Bond Review Committee approve the above referenced bonds (the "2026/2027 Bonds") at its meeting on December 2, 2025.

The 2026/2027 Improvement Bonds will be used to finance planned capital expenditures related to generation resources. These generation resources include the Canadys Natural Gas Joint Build with Dominion Energy, Winyah Simple Cycle Gas Turbines as well as upgrades to the Authority's existing Rainey Natural Gas facility. These Revenue Obligation Bonds will be tax-exempt and taxable, as applicable, and will be issued in 2026 or 2027. The timing of the transaction will depend on market conditions.

Enclosed is the required documentation detailing the proposed financing and use of the funds. On behalf of the Authority, I respectfully request that the Joint Bond Review Committee consider the request for the 2026/2027 Improvement Bonds to be used in the manner described herein.

Please let me know if you have any questions or require any additional information regarding this request.

Sincerely,

A handwritten signature in blue ink that reads 'Tami Wilson'.

Tami Wilson

cc: Suzanne Ritter, Treasurer & Senior Director Financial Planning, The South Carolina Public Service Authority

Enclosures

# **South Carolina Public Service Authority**

## **Bond Information Report**

### **November 12, 2025**

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#### **Requests**

1. Approval for the issuance of Revenue Obligation Bonds not exceeding \$700 million par to fund a portion of the capital project expenditures associated with new generation.

#### **Amount and Type of Bonds Proposed**

The South Carolina Public Service Authority (the “Authority”) is requesting approval from the Joint Bond Review Committee (“JBRC”) to issue South Carolina Public Service Authority Revenue Obligation Bonds not to exceed \$700 million par. These bonds may be issued in one or more transactions and in a combination of tax-exempt and taxable bonds, to fund capital project expenditures totaling approximately \$685,000,000 plus the costs of issuance of the bonds (the “2026/2027 Improvement Bonds”).

On October 24, 2025, the Authority’s Board of Directors (the “Board”) authorized the Authority’s management to move forward with the issuance of the 2026/2027 Improvement Bonds, in an amount not exceeding \$700,000,000 par, subject to approval by the JBRC and final approval by the Board. The final portions of the bonds to be issued as tax-exempt or taxable debt will be determined based on projected cash flows and tax counsel review.

The Authority’s financial advisor and underwriters have advised that the Authority may benefit from credit enhancement of the 2026/2027 Improvement Bonds by utilizing bond insurance. If market conditions are favorable for an insured transaction, the purposes of the 2026/2027 Improvement Bonds will include in the costs of issuance of the bonds the payment of an insurance premium for any applicable municipal bond insurance policy.

#### **Purpose of the Bonds and Use of Proceeds**

##### **The 2026/2027 Improvement Bonds**

In 2025, the Authority completed its annual assessment of demands for electric system investments in the state over a ten-year planning horizon and identified several national and state trends driving these demands. These trends include population growth, re-industrialization in the United States, artificial intelligence and data center power demands, retirement of existing generating assets, environmental regulations, supply chain challenges creating long lead times and inflationary uncertainty, and extended and uncertain timeframes due to permitting and regulatory requirements.

Due to the effects of these trends, the Authority projects a capacity deficit of approximately 2,000 megawatts by the mid 2030’s that must be addressed through upgrading and extending the life of existing resources, constructing new natural gas generating

resources, and pursuing renewable resources, and power purchase agreements. As part of addressing these needs, the Board approved the Rainey Generating Station Combined Cycle Conversion Project on December 20, 2024. The Jointly Owned Natural Gas Combined Cycle Units with Dominion Energy South Carolina (“DESC”) and Installation of Dual-Fuel Aeroderivative Combustion Turbines at the Winyah Generation Site were approved by the Board on October 24, 2025.

The Authority expects to issue the bonds in one or more transactions through 2027, depending on market conditions and updated cash flows. In previous years the Authority has utilized its Bank Credit Facilities to temporarily fund a portion of its Board-approved capital improvement program prior to issuing long-term bonds. The Authority would like to continue this practice when funding these projected construction expenditures to allow the Authority to navigate market conditions and maximize savings while coordinating the timing of potential refundings.

#### Capital Projects to be funded with 2026/2027 Improvement Bonds

Proceeds of the 2026/2027 Improvement Bonds are expected to support \$685 million of expenditures toward the following generation resource projects:

Canadys Natural Gas Joint Build	\$120,000,000
Winyah Aeroderivative Combustion Turbines	293,000,000
Rainey Conversion & Upgrades	<u>272,000,000</u>
<b>Total Bond Par Amount</b>	<b>\$685,000,000</b>

These projects are consistent with the 2025 Integrated Resource Plan. The following is a description of the generation capital projects to be funded by the 2026/2027 Improvement Bonds.

- Canadys Natural Gas Joint Build: The Authority is constructing an approximately 2,200 megawatt (MW) state of the art Natural Gas Combined Cycle (NGCC) facility with DESC on a tract of land adjacent to the Edisto River in Colleton County where Dominion’s former Canadys coal-fired generating plant was located. The Canadys Station project will help strengthen the economy, create jobs, invest in the local community, and will provide a key step forward in securing South Carolina’s energy future. Following the Authority’s Board approval on October 31, 2025, DESC and the Authority signed an agreement on the joint project to comprise three 1x1 combined cycle natural gas units with a commercial operation date planned for mid-2033 with each party owning 50 percent of the units and the output. By partnering on the Canadys Station, the Authority and DESC will take advantage of existing infrastructure, including Authority transmission lines, and will realize other economies of scale that will produce savings for our customers. The Authority and DESC expect to file an application under the

Public Service Commission's Siting Act for a Certificate of Public Convenience and Necessity before the end of 2025. The Authority's resource analysis supports this project as the most economic and reliable option available to our customers, and this project will provide additional natural gas capacity in South Carolina for further economic development. The Authority and DESC are also preparing to apply for certain air, water, and land permits. The total project cost estimate is \$5 billion with the Authority's portion expected to be half of that cost. As of November 10, 2025, the Authority has recorded less than \$2 million in expenditures related to this project. The \$120 million requested for approval by the JBRC will cover costs related to essential planning expenses tied to engineering, permitting and procurement as encouraged by the requirements of §58-33-195. The Authority anticipates returning to the JBRC in 2026 to request approval to issue additional bonds for this joint build, at which time we expect to have the majority of costs for the NGCC units under contract.

- Winyah Aeroderivative Combustion Turbines: The Authority plans to install two aeroderivative combustion turbines (CT) LM6000 units at the Authority's Winyah Generation Station located in Georgetown County, which would provide approximately 108 MW of peaking capacity with a target commercial operation date in December 2027. Each CT will produce 40-60 MW and can run on fuel oil or natural gas. The \$293 million requested would fund the total project cost.
- Rainey Conversion and Upgrades: The Authority is converting its Rainey Generating Station combustion turbines 2A and 2B located in Anderson County to a combined-cycle configuration through the installation of a Heat Recovery Steam Generator (HRSG). This project is expected to add approximately 165 MW of incremental summer capacity, with a target commercial operation date of January 23, 2028. The Authority is also upgrading the Rainey combustion turbines 3/4/5 as well as the Rainey Power Block 1 combined cycle. The \$272 million requested will fund the remaining capital expenditures associated with these projects (\$201 million related to the HRSG and \$71 million for the other capacity enhancements). The conversion and upgrades will add over 250 MW of capacity to the system by 2028.

### *Business Priority*

The Authority's electric system needs are expected to increase over the next five years, primarily driven by economic development loads from new and existing industries in

South Carolina. This substantial increase has been observed across the utility industry broadly, and more specifically in the Southeast, as the load projections for the Authority's neighboring utilities show a similar trend. These surrounding capacity constraints further drive the need to proactively invest in the Authority's system to reduce our reliance on neighboring systems over time and to ensure we provide reliable electricity to our customers.

### **Pledge of Revenues to Pay Bonds and Impacts on Total Debt Service**

The proposed 2026/2027 Improvement Bonds are being issued pursuant to and in full compliance with the resolution adopted by the Board on April 26, 1999 (the "Master Resolution"), as amended and supplemented from time to time. The Master Resolution, as so amended and supplemented, is hereinafter referred to as the "Revenue Obligation Resolution." The Master Resolution will be supplemented by Supplemental Resolutions authorizing the 2026/2027 Improvement Bonds. The 2026/2027 Improvement Bonds will constitute "Obligations" issued under the Revenue Obligation Resolution.

The 2026/2027 Improvement Bonds will be payable solely from, and secured by a lien upon and pledge of, the Revenues on a parity basis with the lien and pledge securing Revenue Obligations issued pursuant to the Revenue Obligation Resolution, senior to (a) payments required to be made from or retained in the Revenue Fund to pay Operation and Maintenance Expenses, and (b) the payments into the Capital Improvement Fund heretofore established under the Revenue Obligation Resolution.

The Revenue Obligations, including the 2026/2027 Improvement Bonds, are not indebtedness of the State, nor any political subdivision thereof, and neither the State nor any of its political subdivisions are liable thereon, nor are they payable from any funds other than the Revenues of the Authority pledged to the payment thereof.

The proposed 2026/2027 Improvement Bonds are expected to mature from December 1, 2028, through December 1, 2062. Issuance of the 2026/2027 Improvement Bonds is expected to result in an increase over existing annual debt service of approximately \$45 million on average.

Attached as Exhibit A is a schedule reflecting the estimated debt service requirements and debt balances on all existing Revenue Obligations of the Authority, including the projected impact of the 2026/2027 Improvement Bonds, prior to and after the issuance of the proposed bonds. This exhibit reflects issuing the entire \$700 million par of 2026/2027 Improvement Bonds in 2026, using interest rates as of November 4, 2025, and current assumptions for portions of the bonds to be issued as tax-exempt or taxable debt. The Authority may elect, however, to issue the bonds in one or more transactions through 2027, depending on market conditions and updated cash flows. Exhibit A reflects estimates under prevailing market conditions and certain additional assumptions that are subject to change; accordingly, while this exhibit is indicative of the impact of the proposed transactions on the debt profile of the Authority, actual results will differ.

### **Impact on Key Financial Metrics and Customer Rates**

The Authority periodically produces financial projections of the operations of the electric and water systems that include, but are not limited to, projected sales and revenues, expenses, capital expenditures and financing needs expected to occur over the forecast period. The projections also include select financial metrics. The Authority provides its projections to the credit rating agencies that rate its bonds (S&P, Moody's, and Fitch) to aid in their evaluation and rating of the Authority's Revenue Obligations. The Authority's recent financial projections reflect the Preliminary 10-year capital plan (2026-2035) which includes the three capital projects being funded by the proposed 2026/2027 Improvement Bonds, as well as the issuance of these proposed bonds over several transactions in 2026 and 2027.

Based on the Authority's current financial projections, the Authority anticipates revenues sufficient to produce debt service coverage in the range of 1.37x to 1.44x from 2026-2028. Outstanding debt as of November 5, 2025, is \$8.4 billion and would increase by approximately \$700 million as a result of the 2026/2027 Improvement Bond issuances once all tranches of these bonds are issued. Offsetting this increase would be a decrease in outstanding debt as scheduled principal payments on existing debt are made. The Debt to Capitalization ratio is expected to stay steady at 78-79% through 2028. While cash-on-hand levels have declined during the rate freeze period, the Authority presently and foreseeably has sufficient bank credit facility capacity to provide sufficient liquidity. Based on current bank credit facility capacity, Days Cash on Hand is expected to range from 102-120 days during the 2026-2028 period, while Days Liquidity is expected to be in the range of 311-400 days during the same period.

### **Potential Refunding Opportunities**

The Authority is monitoring market conditions and may refund callable bonds if targeted savings are reached. Currently, the Authority has approximately \$1.2 billion tax-exempt bonds that are, or will become, callable within the next two years:

		2025 Callable Par	2026 Callable Par	Total
Refunding	Call Date			
2014C	12/1/2024	\$ 65,000,000		\$ 65,000,000
2015A	6/1/2025	145,975,000		145,975,000
2015E	12/1/2025	108,125,000		108,125,000
2016A	6/1/2026		457,735,000	457,735,000
2016BC	12/1/2026		449,845,000	449,845,000
<b>Total Refunding</b>		<b>\$ 319,100,000</b>	<b>\$ 907,580,000</b>	<b>\$1,226,680,000</b>

South Carolina Code Ann. § 58-31-240 specifies that only refinancings that do not achieve savings in total debt service require JBRC approval. The Authority anticipates that refunding these bonds would be for savings; accordingly, the Authority will communicate to the Committee if, and when, these transactions take place for informational purposes.

**ATTACHMENT:**

Exhibit A – Debt Service Schedule

**AVAILABLE:**

South Carolina Public Service Authority Enabling Act  
Master Revenue Obligation Resolution  
Board Resolution Authorizing the Joint Owned Natural Gas Combined Cycle Units with Dominion Energy South Carolina at Canadys  
Board Resolution Authorizing Installation of Dual-Fuel Aeroderivative Combustion Turbines at the Winyah Generation Site  
Board Resolution Authorizing the Rainey Generating Station Combined Cycle Conversion Project (HRSG)  
Board Resolution Authorizing Revenue Obligation Bonds 2026/2027

**Contacts**

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(843) 729-6099

**Financial Advisor**

PFM Financial Advisors LLC  
Charlotte, NC

**Bond Counsel**

Burr Forman McNair  
Charleston, SC

**Disclosure Counsel**

Nixon Peabody, LLP  
New York, NY



Exhibit A  
South Carolina Public Service Authority

Estimated Impacts of the Proposed 2026/2027 Improvement Bonds

(\$000s)	Existing Debt (1) (2)			Proposed New Money (3)(4)			Total Existing and Proposed		
	Principal	Interest	Total	Principal	Interest	Total	Principal	Interest	Total
	Year	Principal	Interest	Total	Principal	Interest	Total	Principal	Outstanding
<b>Commercial Paper &amp; Revolving Credit Agreement Loans (Principal Only) (5)</b>									
5-Nov-25	686,832		686,832	(10,000)		(10,000)	676,832	Varies	676,832
<b>Revenue Obligation Bonds</b>									
2025	110,575	167,613	278,188	-	-	-	110,575	167,613	278,188
2026	163,472	354,517	517,989	-	26,665	26,665	163,472	381,182	544,654
2027	164,061	347,065	511,126	-	35,553	35,553	164,061	382,618	546,679
2028	203,680	340,055	543,732	8,175	35,553	43,728	211,855	375,605	587,460
2029	183,806	330,787	514,593	8,560	35,161	43,721	192,366	365,948	558,314
2030	229,582	322,235	551,817	8,975	34,750	43,725	238,557	356,985	595,542
2031	223,693	313,004	536,697	9,405	34,317	43,722	233,098	347,321	580,419
2032	212,570	303,135	515,705	10,230	33,861	44,091	222,800	336,996	559,796
2033	228,801	294,243	523,044	12,625	33,363	45,988	241,426	327,606	569,032
2034	245,569	283,053	528,622	13,240	32,745	45,985	258,809	315,798	574,607
2035	241,423	271,201	512,624	13,900	32,093	45,993	255,323	303,294	558,617
2036	286,452	259,359	545,811	14,575	31,404	45,979	301,027	290,764	591,791
2037	255,705	245,915	501,620	15,300	30,679	45,979	271,005	276,594	547,599
2038	242,676	233,398	476,074	16,070	29,916	45,986	258,746	263,314	522,060
2039	235,528	221,472	457,000	16,860	29,112	45,972	252,388	250,584	502,972
2040	248,228	210,020	458,248	17,715	28,268	45,983	265,943	238,289	504,232
2041	259,550	198,135	457,685	18,595	27,379	45,974	278,145	225,514	503,659
2042	271,405	185,951	457,356	19,530	26,444	45,974	290,935	212,395	503,330
2043	265,450	173,236	438,686	20,530	25,449	45,979	285,980	198,686	484,666
2044	243,875	160,278	404,153	21,575	24,403	45,978	265,450	184,681	450,131
2045	327,049	146,651	473,700	22,675	23,304	45,979	349,724	169,956	519,680
2046	319,765	131,669	451,434	23,835	22,149	45,984	343,600	153,818	497,418
2047	271,894	116,830	388,724	25,045	20,935	45,980	296,939	137,765	434,704
2048	283,621	104,123	387,744	26,320	19,650	45,970	309,941	123,773	433,714
2049	286,097	90,770	376,867	27,680	18,299	45,979	313,777	109,069	422,846
2050	338,592	78,177	416,769	29,090	16,878	45,968	367,682	95,055	462,737
2051	294,786	63,456	358,242	30,600	15,385	45,985	325,386	78,841	404,227
2052	305,570	49,436	355,006	32,155	13,815	45,970	337,725	63,250	400,975
2053	288,536	34,781	323,317	33,815	12,164	45,979	322,351	46,945	369,296
2054	247,273	20,962	268,235	35,545	10,427	45,972	282,818	31,389	314,207
2055	148,291	9,017	157,308	37,385	8,601	45,986	185,676	17,618	203,294
2056	41,395	1,987	43,382	39,305	6,681	45,986	80,700	8,668	89,368
2057				41,310	4,662	45,972	41,310	4,662	45,972
2058				43,435	2,539	45,974	43,435	2,539	45,974
2059				1,375	307	1,682	1,375	307	1,682
2060				1,450	236	1,686	1,450	236	1,686
2061				1,520	161	1,681	1,520	161	1,681
2062			-	1,600	83	1,683	1,600	83	1,683
Total Revenue Obligations	7,668,970	6,062,530	13,731,500	700,000	783,391	1,483,391	8,368,970	6,845,921	15,214,891
Total Debt Outstanding	8,355,802			9,045,802					

(1) Debt outstanding as of November 5, 2025 is reflected on a cash basis and net of Babbs Subsidy

(2) The 2019A variable interest rate was updated using new projected rates received on September 2, 2025

(3) Preliminary estimates based on November 5, 2025 interest rates and subject to change

(4) The Commercial Paper and Revolving Credit Agreement Loan total includes issuing for projected expenditures up to the bond issuance date, netted by the pay down of that debt with bond proceeds

(5) On October 7, 2025, the Joint Bond Review Committee approved the Authority's request to issue long-term bonds, not to exceed \$570 million par, to fund the Cook Exceptions. These Cook Exceptions are currently financed through the Commercial Paper and Revolving Credit Agreement Loans; the long-term bonds have not yet been issued.

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AGENCY: South Carolina Public Service Authority

SUBJECT: Proposed Disposition of Real Property  
Surplus Property at Camp Hall Commerce Park, Berkeley County

Section 58-31-240(B) of the South Carolina Code of Laws provides that a transfer of any interest in real property by the South Carolina Public Service Authority, regardless of the value of the transaction, requires approval, rejection, or modification by the Joint Bond Review Committee, except that this requirement does not apply to encroachment agreements, rights of way, or lease agreements made by the Authority for property within the Federal Energy Regulatory Project boundary.

The South Carolina Public Service Authority requests approval to sell approximately 21.58 acres within the Camp Hall Commerce Park to CH Cold OZ, LLC<sup>1</sup> at a price of \$285,000 per acre and a total estimated purchase price of \$6,150,300 with the final purchase price and acreage determined by a boundary survey.

The purchaser intends to use the property to construct a cold storage facility and other ancillary or related facilities. The project is expected to generate more than \$40 million in capital investment.

The Authority's Board has declared the property to be surplus real property and has authorized its sale, lease, option, or transfer otherwise, in whole or in part, for development purposes.

COMMITTEE ACTION:

In accordance with Section 58-31-240(B)(2) of the South Carolina Code,<sup>2</sup> review and approve, reject, or modify the Authority's request to sell approximately 21.58 acres within the Camp Hall Commerce Park to CH Cold OZ, LLC for a total estimated purchase price of \$6,150,300.

ATTACHMENTS:

1. Letter dated December 2, 2025, of Mr. J. Martine Watson, Chief Commercial Officer, Santee Cooper.
2. Map of the property and substantive terms of sale.

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<sup>1</sup> An Indiana limited liability company in good standing registered with the SC Secretary of State effective November 12, 2025. CT Corporation System of Columbia, SC is registered agent. Private Participant Disclosures were included with the submission.

<sup>2</sup> Section 58-31-240(B)(2) of the South Carolina Code provides that a transfer of any interest in real property by the South Carolina Public Service Authority, regardless of the value of the transaction, requires approval, rejection, or modification by the Joint Bond Review Committee.

December 2, 2025

The Honorable Harvey S. Peeler, Jr.  
Chairman, Joint Bond Review Committee  
South Carolina Senate  
111 Gressette Building  
Columbia, SC 29201

Re: Property Sale of ~ 21.58 acres in Campus 6A of the Camp Hall Commerce Park located in Berkeley County (the "Property")

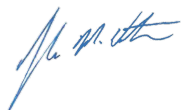
Dear Chairman Peeler:

The South Carolina Public Service Authority ("Santee Cooper") requests that the Joint Bond Review Committee ("JBRC") approve the sale of approximately 21.58 acres of surplus property within the Camp Hall Commerce Park to CH Cold OZ, LLC ("Purchaser") as described on Attachment A. The Purchaser intends to use the Property to construct a cold storage facility and other ancillary or related facilities.

The Property is known as Campus 6A and contains approximately 21.58 acres located in Camp Hall Commerce Park. Santee Cooper's Board of Directors declared Camp Hall property to be surplus real property and authorized that it or portions of it may be sold, leased, optioned, or otherwise transferred for development purposes. The purchase price of \$285,000/acre for the Property was determined by broker price recommendation based on comparable sales, and results in expected proceeds of ~\$6.1 million, and the sale is projected to generate in excess of \$40 million in capital investment.

Attachment A describes the substantive terms of the proposed sale and the location of the parcel for which approval is requested.

Sincerely,



J. Martine Watson

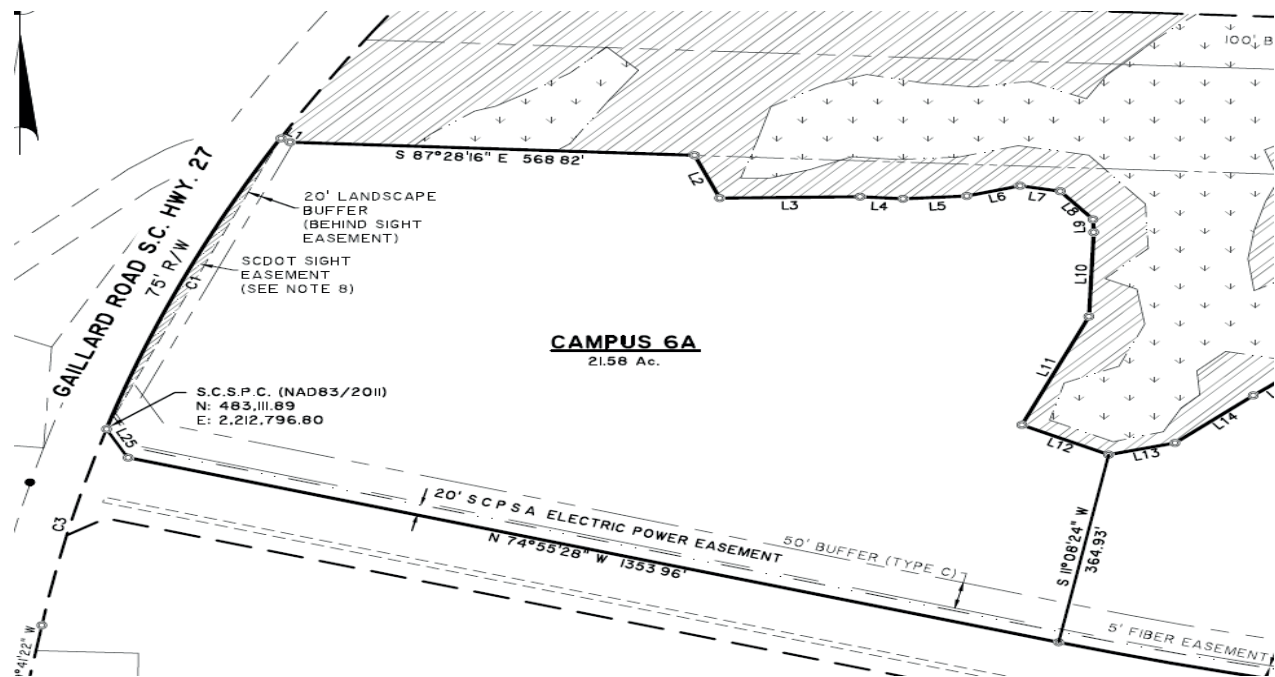
JMW:kmr

### ATTACHMENT A

The substantive terms of the proposed Purchase and Sale agreement ("PSA") are as follows:

<b>Purchaser</b>	<b>CH Cold OZ, limited liability company</b>
<b>Acreage</b>	<b>Approximately 21.58 acres located in Campus 6 of Camp Hall Commerce Park, particularly identified as Campus 6A</b>
<b>Purchase Price</b>	<b>\$285,000 per acre for an estimated total price of +/- \$6,150,300 with the final purchase price and acreage determined by a boundary survey.</b>
<b>Earnest Money Deposit</b>	<b>\$100,000 upon PSA execution</b>
<b>Inspection Period</b>	<b>120 days from Effective Date of PSA with option to extend for an additional 30 days with payment of an Additional Deposit of \$50,000.00.</b>
<b>Approximate Closing Date</b>	<b>45 days following the expiration of Inspection Period.</b>
<b>Permitted Use</b>	<b>The Permitted Use shall mean the development and operation of class A cold storage and other ancillary or related facilities. Any other uses of the Property must be approved in writing by the Seller.</b>
<b>Special Provisions</b>	<b>Purchaser must commence construction within one year after Closing Date.</b>
<b>Pricing Methodology</b>	<b>The methodology utilized for pricing was determined by broker price recommendation based on comparable sales.</b>





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AGENCY: South Carolina Public Service Authority

SUBJECT: Lease Proposal  
Jefferies Hydroelectric Generating Station Site  
463 Power House Road, Moncks Corner, Berkeley County

Section 58-31-240(B) of the South Carolina Code of Laws provides that a transfer of any interest in real property by the South Carolina Public Service Authority, regardless of the value of the transaction, requires approval, rejection, or modification by the Joint Bond Review Committee, except that this requirement does not apply to encroachment agreements, rights of way, or lease agreements made by the Authority for property within the Federal Energy Regulatory Project boundary.

The Authority requests approval to lease approximately 21.054 acres to AYP Development, d.b.a Pinopolis Reliability Project, LLC<sup>1</sup> (Pinopolis) for a Battery Energy Storage System (BESS) in Berkeley County.

The Authority identified a need for a BESS near its Jefferies Hydroelectric Generating Station to support the system's growing load and reliability needs. Santee Cooper issued a Request for Proposal ("RFP") for a BESS in March 2025 for up to 300 MW to be located on Santee Cooper property adjacent to the Jefferies site. Santee Cooper identified Pinopolis as the winner of the RFP. Per their proposal Pinopolis will build, own, and operate the 300 MW BESS project, with plans to be operational by December 2027. As part of the agreement, Santee Cooper is to provide a nominal-cost ground lease with a 20-year term.

COMMITTEE ACTION:

Approve the lease of 21.054 acres by the Authority to AYP Development, d.b.a Pinopolis Reliability Project, LLC as described herein.

ATTACHMENTS:

1. Letter dated December 2, 2025, of Mr. J. Martine Watson, Chief Commercial Officer, Santee Cooper.
2. Map of the property location and substantive lease terms.

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<sup>1</sup> A Delaware limited liability company in good standing registered with the SC Secretary of State effective October 2, 2025. CT Corporation System of Columbia, SC is registered agent. Private Participant Disclosures were included with the submission.



**J. Martine Watson**  
Chief Commercial Officer  
(843) 761-7072  
marty.watson@santeecooper.com

December 2, 2025

The Honorable Harvey S. Peeler, Jr. Chairman,  
Joint Bond Review Committee  
South Carolina Senate  
111 Gressette Building  
Columbia, SC 29201

RE: Lease of Property at the Jefferies Hydroelectric Generating Station site located at 463 Power House Road, Moncks Corner, Berkeley County, South Carolina

Dear Chairman Peeler:

The South Carolina Public Service Authority (“Santee Cooper”) requests that the Joint Bond Review Committee (“JBRC”) approve a lease of approximately 21.054 acres of property adjacent to its Jefferies Hydroelectric Generating Station (“Jefferies”) for a Battery Energy Storage System (“BESS”) in Berkeley County.

Santee Cooper identified a need for BESS to support the system’s growing load and reliability needs. Santee Cooper issued a Request for Proposal (“RFP”) for a BESS in March 2025 for up to 300 MW to be located on Santee Cooper property adjacent to Jefferies. Santee Cooper identified AYP Development, d.b.a Pinopolis Reliability Project LLC. (“Pinopolis”) as the winner of the RFP. Per their proposal Pinopolis will build, own, and operate the 300 MW BESS project, with plans to be operational by December 2027. As part of the agreement, Santee Cooper is to provide a nominal-cost ground lease with a 20-year term.

Attachment A describes the substantive terms of the Lease for which approval is requested.

Santee Cooper respectfully requests that the JBRC approve the request for this Lease.

Sincerely,

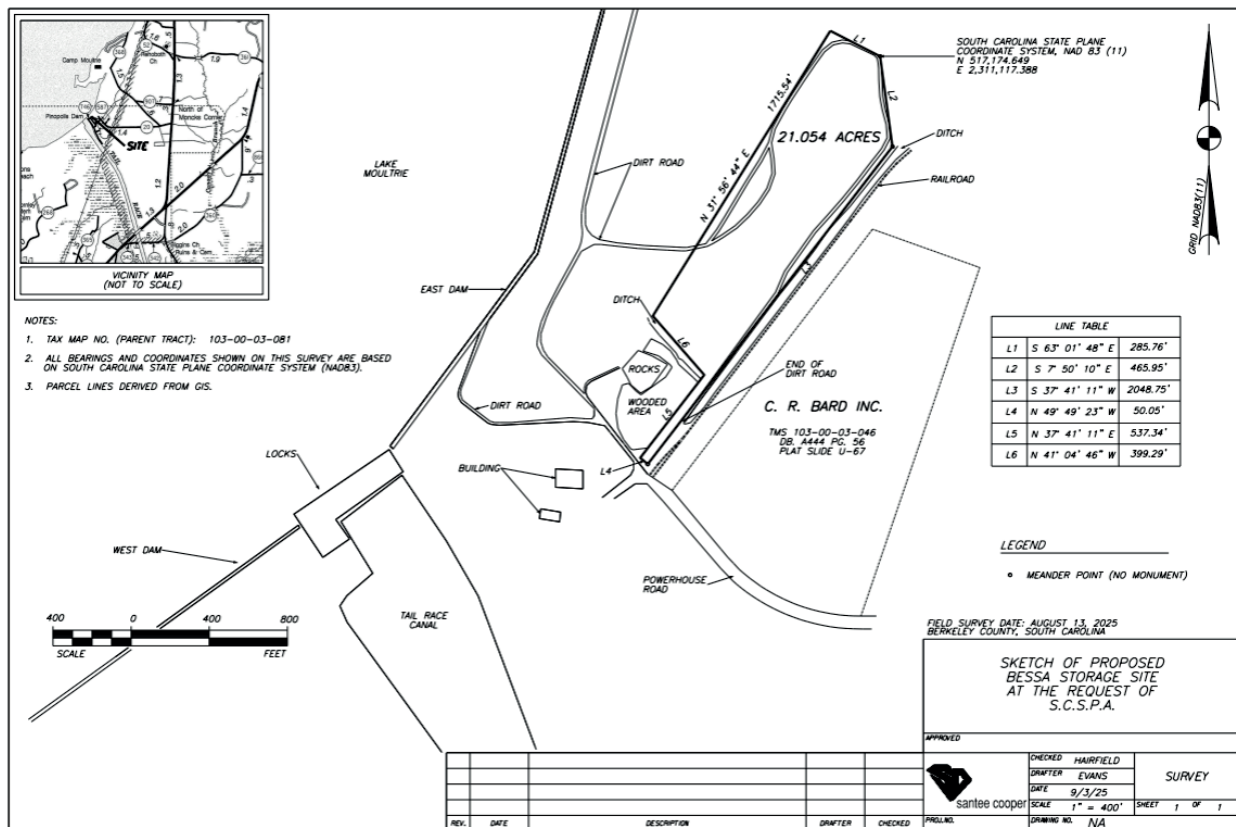
A handwritten signature in blue ink, appearing to read 'J. Martine Watson', written over a light blue horizontal line.

J. Martine Watson

## Attachment A

Substantive terms of Lease Extension for approximately 21.054 acres of the Jefferies Hydroelectric Generation Station located at 463 Power House Road, Moncks Corner, Berkeley County, South Carolina, are as follows:

<b>Lessor</b>	<b>South Carolina Public Service Authority</b>
<b>Lessee</b>	<b>Pinopolis Reliability Project LLC</b>
<b>Property</b>	<b>21.054 acres of the Jefferies Hydroelectric Generation Station in Berkeley County</b>
<b>Term</b>	<b>20-years</b>
<b>Rental and Mutual Benefits</b>	<b>Nominal cost (\$5.00/year) lease with compensation reflected in power agreement</b>





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AGENCY: South Carolina Public Service Authority

SUBJECT: Lease Proposal  
Material Storage Site  
Smith Millpond Road, Marion County

Section 58-31-240(B) of the South Carolina Code of Laws provides that a transfer of any interest in real property by the South Carolina Public Service Authority, regardless of the value of the transaction, requires approval, rejection, or modification by the Joint Bond Review Committee, except that this requirement does not apply to encroachment agreements, rights of way, or lease agreements made by the Authority for property within the Federal Energy Regulatory Project boundary.

The Authority requests approval to lease approximately 15.05 acres located at Smith Millpond Road in Marion County from Philip R. Page and Shirley A. Page<sup>1</sup> for a material storage site. The Authority's current lease for the property expires December 31, 2025. The storage site currently holds \$20 million of transmission equipment and serves the Marion to Red Bluff transmission project and will also serve the forthcoming Bennettsville to Latta transmission project.

The term of the proposed lease is 5 years beginning on January 1, 2026. The total rent over the term is expected to be \$102,000 or \$1,700 per month. Although the negotiated rental rate exceeds the current appraisal, Santee Cooper reports that the operational savings of extending the lease versus the cost of new site development and hauling costs, which are approximately \$1.2 million, far exceed the higher rent. Santee Cooper will actively pursue other potential material storage site locations in the area to ensure adequate alternatives when the term of the new lease expires.

COMMITTEE ACTION:

Approve the lease of 15.05 acres by the Authority from Philip R. Page and Shirley A. Page as described herein.

ATTACHMENTS:

1. Letter dated December 2, 2025, of Mr. J. Martine Watson, Chief Commercial Officer, Santee Cooper.
2. Map of the property location and substantive lease terms.

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<sup>1</sup> Private Participant Disclosures were included with the submission.



**J. Martine Watson**  
Chief Commercial Officer  
(843) 761-7072  
marty.watson@santeecooper.com

December 2, 2025

The Honorable Harvey S. Peeler, Jr.  
Chairman, Joint Bond Review Committee  
South Carolina Senate  
111 Gressette Building  
Columbia, SC 29201

RE: Material Storage Site Lease of +/- 15.05 acres on Smith Millpond Road located in Marion County

Dear Chairman Peeler:

The South Carolina Public Service Authority (“Santee Cooper”) requests that the Joint Bond Review Committee approve the lease of approximately 15.05 acres of property for a material storage site as described on Attachment A.

The current lease expires December 31, 2025. The material storage site lease currently holds \$20M of transmission equipment and serves the Marion to Red Bluff transmission project and will also serve the forthcoming Bennettsville to Latta transmission project. Although the negotiated rate exceeds the current appraisal by \$39,000 over the term of the lease, the operational savings of extending the lease versus the cost of new site development and hauling costs (\$1.2M) far exceed the higher rent. Santee Cooper does continue to actively pursue other potential material storage site locations in the area to ensure adequate alternatives when the term of this new lease expires.

Attachment A describes the substantive terms of the proposed material storage site lease for which approval is requested, as well as maps showing the location of the Property.

Sincerely,

A handwritten signature in blue ink, appearing to read 'J. Martine Watson', written over a light blue horizontal line.

J. Martine Watson

## Attachment A

Substantive terms of proposed Lease Agreement are as follows:

<b>Lessor</b>	<b>Philip R. Page and Shirley A. Page</b>
<b>Property</b>	<b>15.05 acres, Marion to Red Bluff Material Storage Yard</b>
<b>Term</b>	<b>Five-year term</b>
<b>Rental</b>	<b>\$102,000 for entire term \$1,700 month-to-month rental rate</b>
<b>Pricing Methodology</b>	<p><b>Rental based on negotiations with landowner:</b></p> <ul style="list-style-type: none"> <li>-Appraisal for ground rent \$1,050/month</li> <li>-Additional \$650/month or \$39K supported by operational savings</li> </ul> <p><b>Business case for renewal under proposed terms:</b></p> <ul style="list-style-type: none"> <li>-Site development costs savings of \$250K</li> <li>-Hauling cost to new location would exceed \$900K</li> <li>-Time Constraints</li> </ul>



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AGENCY: Department of Administration  
Facilities Management and Real Property Services

SUBJECT: Proposed Lease  
The South Carolina First Steps to School Readiness  
Office and Warehouse Space at 632 Rosewood Drive, Columbia

The South Carolina First Steps to School Readiness requests review of its proposal to lease approximately 15,950 square feet of office and warehouse space located at 632 Rosewood Drive, Suites A-C in Columbia from Precoat Mezzanine, LLC.<sup>1</sup> First Steps has been at this location since 2021, and the lease will continue to provide outreach support for the agency.

The Department of Administration conducted a solicitation for various terms following a determination that other state space was not available and received 2 responsive offers. This location was the lowest option when considering moving and IT costs.

The term of the proposed lease is 3 years and 1 day beginning on or about October 31, 2026. The rental rate for the first day and year of the term is \$271,878 or \$17.00 per square foot. Rent includes taxes, insurance, and operating expenses.

The rental rate will increase by 3% annually beginning in year 2. Total rent over the term is expected to be \$838,826. No option to purchase the property is included in the lease.

The Department of Administration reports that lease payments will be made from State Appropriations; and the agency's submission represents that funding for payments will be sufficient throughout the lease term. The Department of Administration reports that comparable rates for similar commercial space available in the area range from an average rate of \$14.00 to \$18.04 per square foot.

COMMITTEE ACTION:

Review and make recommendation regarding the proposed lease.

ATTACHMENTS:

1. Department of Administration, Facilities Management and Property Services, Agenda Item Worksheet.
2. Letter dated October 10, 2025, of Ann Verdervliet, Executive Director, SC First Steps.

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<sup>1</sup> A Delaware limited liability company in good standing registered with the SC Secretary of State effective June 28, 2022. CT Corporation System of Columbia, SC is registered agent. Private Participant Disclosures were included with the submission.

**JOINT BOND REVIEW COMMITTEE  
AGENDA ITEM WORKSHEET**

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**Meeting Scheduled for: December 2, 2025**

**Regular Agenda**

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**1. Submitted by:**

**2. Submitted by:**

- (a) Agency: Department of Administration  
(b) Authorized Official Signature:

*Ashlie Lancaster*

Ashlie Lancaster, Director

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**2. Subject:** South Carolina First Steps to School Readiness Sublease of 632 Rosewood Drive, Suites A-C, Columbia, SC

**3. Summary Background Information:**

The South Carolina First Steps to School Readiness (Agency) requests approval to continue to sublease fifteen thousand nine hundred fifty (15,950) square feet of office & warehouse space in Columbia from Precoat Mezanine, LLC. This sublease will continue to provide outreach support for the Agency. The Agency has been at this location since 2021. Their current lease at this location is at a rate of \$15.24 per square foot, and it expires on October 30, 2026.

After contacting state agencies to verify no adequate State space was available, the Department of Administration solicited for commercial space for various lease terms. There were two (2) proposals received, with this location being the lowest option when considering moving and IT costs.

The requested sublease term is three (3) years and one (1) day and is expected to commence on or about October 31, 2026.

The rent for the first day and year of the term will be \$271,878.90 or \$17.00 per square foot (rounded) and includes operating expenses, taxes and insurance. Beginning in year two, the rental rate shall escalate 3% annually over the term. The following chart sets forth the rent over the term.

<u>TERM</u>	<u>PERIOD: FROM - TO</u>	<u>MONTHLY RENT</u>	<u>ANNUAL RENT</u>	<u>RENT PER SF</u>
DAY 1	10/31/2026		\$728.90*	17.00
YEAR 1	11/1/2026-10/31/2027	\$22,595.83	\$271,150.00	\$17.00
YEAR 2	11/1/2027-10/31/2028	\$23,273.71	\$279,284.50	\$17.51
YEAR 3	11/1/2028-10/31/2029	\$23,971.92	\$287,633.04	\$18.04

\* One day of rent

The total rent to be paid over the term is \$838,826.44.

The following chart represents comparable lease rates of similar space in the Columbia area:

<b>Tenant</b>	<b>Location</b>	<b>Rent per SF</b>
Vacant**	1627 Columbia College Drive, Columbia	\$14.00
SC Department of Children's Advocacy +	220 Stoneridge Drive, Suite 102, Columbia	\$18.04
SC Health and Human Services	200 Arbor Lake Drive, Suite 100, Columbia	\$17.40

\*\*Proposal received in response to the solicitation. + Subject to base rent escalations.

The sublease has adequate parking on premises. The sublease also meets the State space standards with a density of approximately 196 SF per person.

The Agency has adequate funds for the sublease according to a Budget Approval Form approved by the Capital Budgeting Office on November 7, 2025. Sublease payments will be funded through state appropriations.

No option to purchase the property is included in the sublease.

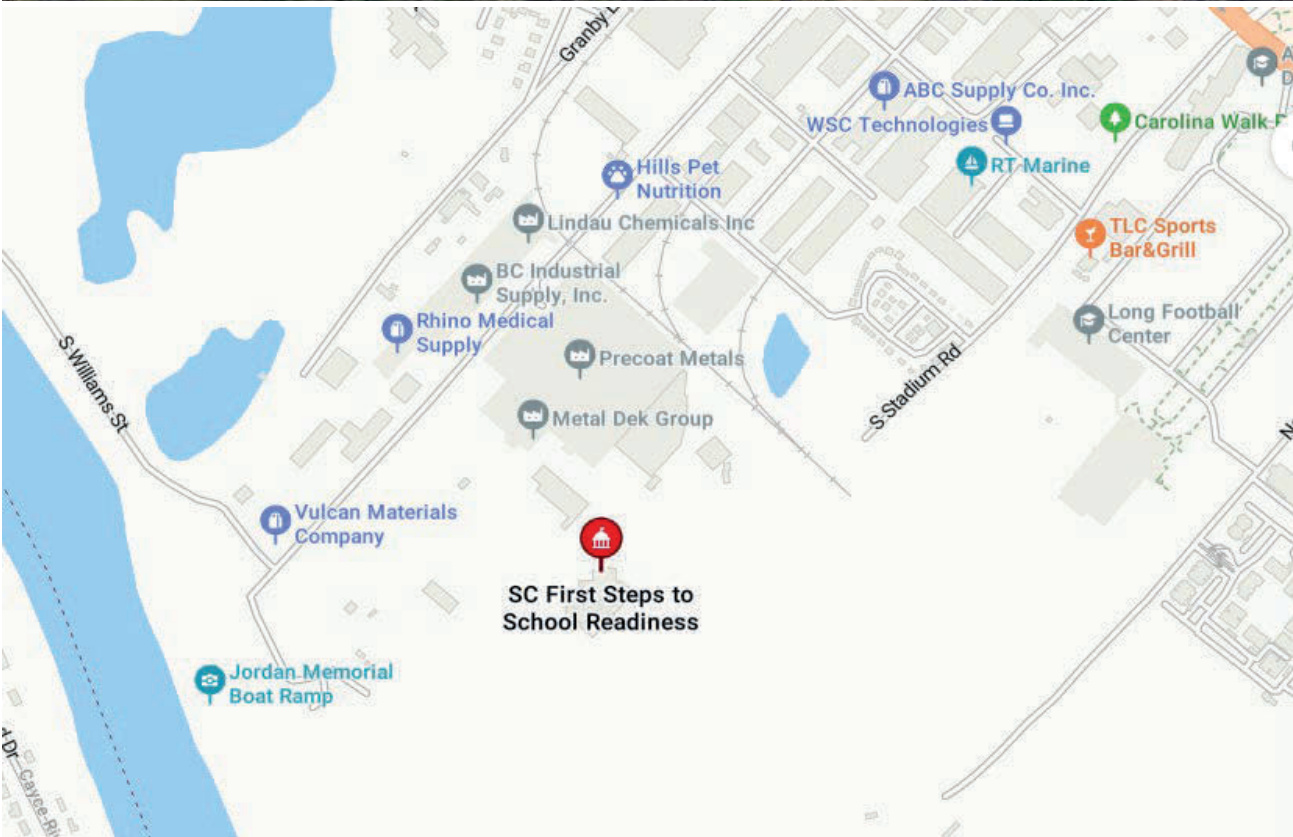
- 
- 4. What is the JBRC asked to do?** Approve the proposed three-year and one day sublease for South Carolina First Steps to School Readiness of fifteen thousand nine hundred fifty (15,950) square feet of office space at 632 Rosewood Drive, Suites A-C in Columbia from Precoat Mezanine, LLC.
- 

- 5. What is recommendation of the submitting agency involved** Approve the proposed three-year and one day sublease for South Carolina First Steps to School Readiness of fifteen thousand nine hundred fifty (15,950) square feet of office space at 632 Rosewood Drive, Suites A-C in Columbia from Precoat Mezanine, LLC.
- 

**6. List of Supporting Documents:**

- (a) Letter from Agency
- (b) Private Participant Disclosure Forms
- (c) Map and Street view of Premises







October 10, 2025

Ms. Ashlie Lancaster  
South Carolina Department of Administration  
Real Property Services  
1200 Senate Street, 6th Floor  
Columbia, SC 29201

RE: Lease Renewal for 632 Rosewood Drive, Columbia, SC 29201

Dear Ms. Lancaster:

South Carolina First Steps respectfully requests approval from the Department of Administration, Facilities Management and Property Services (FMPS), to proceed with a three (3)-year renewal of our lease with Precoat for approximately 15,950 rentable square feet of office space at 632 Rosewood Drive, Columbia, SC 29201. Our current lease at this location expires on October 30, 2026.

As part of the process, state space availability was reviewed, and commercial proposals were solicited. After evaluating the options received, remaining at 632 Rosewood Drive with Precoat is recommended based on operational continuity, avoidance of relocation and build-out costs, and overall value to the State. The cumulative cost for the three-year term is estimated at \$838,097.54.

We appreciate your consideration and are available to provide any additional information needed to complete the approval process.

Sincerely,

Signed by:  
  
Ann Vandervliet,  
Executive Director, SC First Steps

Initial  


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636 Rosewood Drive | Columbia, South Carolina 29201

phone 803.734.0479 fax 803.734.1431

**SCFIRSTSTEPS.ORG**



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AGENCY: Department of Administration  
Facilities Management and Real Property Services

SUBJECT: Proposed Lease  
South Carolina School for the Deaf and Blind  
Office Space at 101 Executive Drive, Suites 110 & 120, Columbia

The South Carolina School for the Deaf and Blind requests review of its proposal to lease 6,937 square feet of office space located at 101 Executive Center Drive in Columbia near Interstate 26 from BV DRP Synergy II Owner, LLC.<sup>1</sup> The lease will support the agency's Division of Outreach Services. The agency has leased space at this location since 1985, and its current lease will expire on March 31, 2026.

The Department of Administration conducted a solicitation for various terms following a determination that other state space was not available and received 4 responsive offers.

The term of the proposed lease is 10 years beginning on or about April 1, 2026. The rental rate for the first year of the term is \$121,397 or \$17.50 per square foot. Rent includes taxes, insurance, and operating expenses.

The rental rate will increase by 3% annually beginning in year 2. Total rent over the term is expected to be \$1,391,686. No option to purchase the property is included in the lease.

The Department of Administration reports that lease payments will be made from State Appropriations; and the agency's submission represents that funding for payments will be sufficient throughout the lease term. The Department of Administration reports that comparable rates for similar commercial space available in the area range from an average rate of \$17.75 to \$19.00 per square foot.

COMMITTEE ACTION:

Review and make recommendation regarding the proposed lease.

ATTACHMENTS:

1. Department of Administration, Facilities Management and Property Services, Agenda Item Worksheet.
2. Letter dated August 26, 2025, of Jolene L. Madison, President, the South Carolina School for the Deaf and the Blind.

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<sup>1</sup> A Delaware limited liability company in good standing registered with the SC Secretary of State effective October 22, 2019. National Registered Agents, Inc. of Columbia, SC is registered agent. Private Participant Disclosures were included with the submission.

**JOINT BOND REVIEW COMMITTEE  
AGENDA ITEM WORKSHEET**

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**Meeting Scheduled for: December 2, 2025**

**Regular Agenda**

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**1. Submitted by:**

**2. Submitted by:**

- (a) Agency: Department of Administration  
(b) Authorized Official Signature:

Ashlie Lancaster  
Ashlie Lancaster, Director

---

**2. Subject:** SC School for the Deaf and Blind Lease of 101 Executive Center Drive, Suites 110 & 120, Columbia, SC

**3. Summary Background Information:**

The SC School for the Deaf and Blind (Agency) requests approval to continue to lease six thousand nine hundred thirty-seven (6,937) square feet of office space at 101 Executive Center Drive in Columbia from BV DRP Synergy II Owner, LLC. The Agency has been located at this space since 1985. The current lease is at a rate of \$16.88 per square foot, and it expires on March 31, 2026. This lease will continue to provide space for the Agency's Division of Outreach Services.

After contacting state agencies to verify no adequate State space was available, the Department of Administration solicited for commercial space for various lease terms. There were a total of four (4) proposals received. The selected location was the lowest option.

The requested lease term is ten (10) years and is expected to commence on or about April 1, 2026.

The rent for the first year of the term will be \$121,397.50 or \$17.50 per square foot (rounded) including operating expenses, taxes and insurance. Beginning in year two, the rental rate shall escalate 3% annually over the term. The following chart sets forth the rent over the term.

<u><b>TERM</b></u>	<u><b>PERIOD: FROM - TO</b></u>	<u><b>MONTHLY RENT</b></u>	<u><b>ANNUAL RENT</b></u>	<u><b>RENT PER SF</b></u>
YEAR 1	4/1/2026-3/31/2027	\$10,116.46	\$121,397.50	\$17.50
YEAR 2	4/1/2027-3/31/2028	\$10,419.95	\$125,039.43	\$18.03
YEAR 3	4/1/2028-3/31/2029	\$10,732.55	\$128,790.61	\$18.57
YEAR 4	4/1/2029-3/31/2030	\$11,054.53	\$132,654.33	\$19.12
YEAR 5	4/1/2030-3/31/2031	\$11,386.16	\$136,633.96	\$19.70
YEAR 6	4/1/2031-3/31/2032	\$11,727.75	\$140,732.97	\$20.29

YEAR 7	4/1/2032-3/31/2033	\$12,079.58	\$144,954.96	\$20.90
YEAR 8	4/1/2033-3/31/2034	\$12,441.97	\$149,303.61	\$21.52
YEAR 9	4/1/2034-3/31/2035	\$12,815.23	\$153,782.72	\$22.17
YEAR 10	4/1/2035-3/31/2036	\$13,199.68	\$158,396.20	\$22.83

The total rent to be paid over the term is \$1,391,686.29.

The following chart represents comparable lease rates of similar space in the Columbia area, all of which were proposals received in response to the solicitation:

Tenant	Location	Rent per SF*
Vacant	113 Reed Avenue, Lexington	\$19.00
Vacant	107 Westpark Drive, 1 <sup>st</sup> Floor, Columbia	\$17.75
Vacant	107 Westpark Drive, 3 <sup>rd</sup> Floor, Columbia	\$17.75

\*All subject to base rent escalations

The lease has adequate parking on the premises. The lease also meets the State space standards with a density of approximately 110 SF per person.

The Agency has adequate funds for the lease according to a Budget Approval Form approved by the Capital Budgeting Office on October 20, 2025. Lease payments will be funded through State Appropriations.

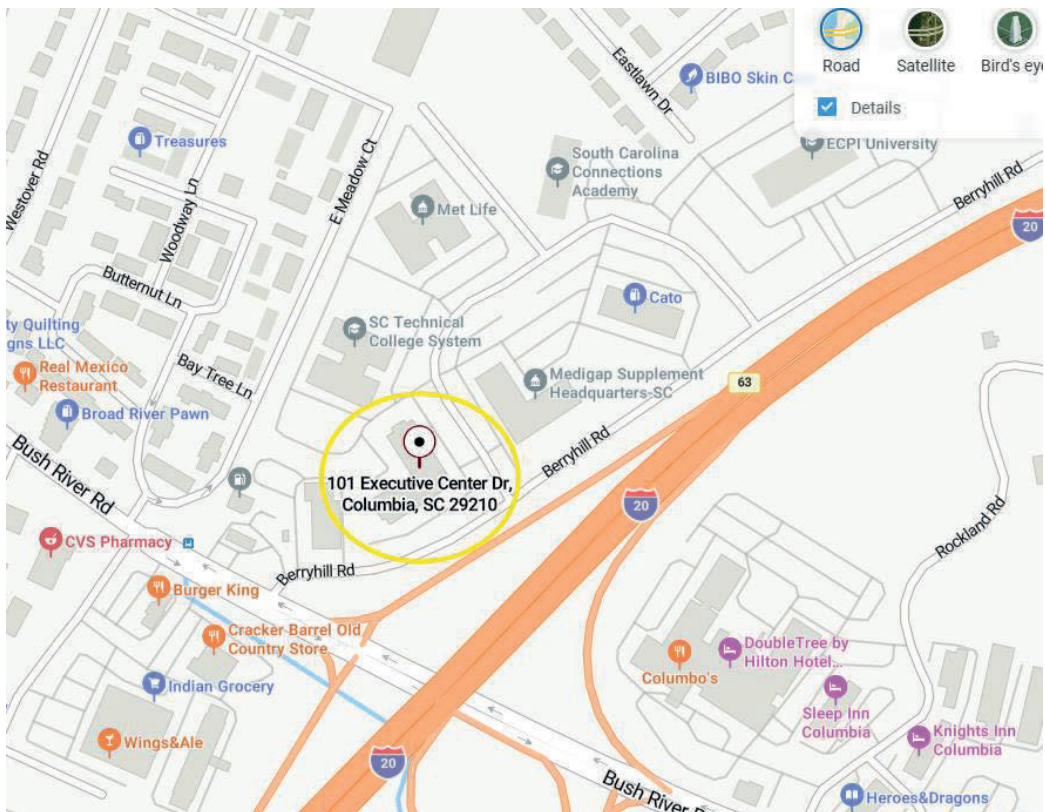
No option to purchase the property is included in the lease.

- 
- 4. What is the JBRC asked to do?** Approve the proposed ten-year lease for the SC School for the Deaf and Blind of six thousand nine hundred thirty-seven (6,937) square feet of office space at 101 Executive Center Drive, Suites 110 & 120 in Columbia from BV DRP Synergy II Owner, LLC
- 

- 5. What is recommendation of the submitting agency involved** Approve the proposed ten-year lease for the SC School for the Deaf and Blind of six thousand nine hundred thirty-seven (6,937) square feet of office space at 101 Executive Center Drive, Suites 110 & 120 in Columbia from BV DRP Synergy II Owner, LLC.
- 

**6. List of Supporting Documents:**

- (a) Letter from Agency
- (b) Private Participant Disclosure Forms
- (c) Map and Street view of Premises





# School for the Deaf and the Blind

## **Vision Statement**

*To be the statewide leader in education  
and accessibility for individuals who are  
deaf, blind, or sensory multi-disabled*

Ms. Ashlie Lancaster  
South Carolina Department of Administration  
Real Property Services  
1200 Senate Street, 6<sup>th</sup> floor  
Columbia, SC 29201

RE: Lease for 101 Executive Center Drive Ste. 110 & Ste. 120, Columbia, SC 29210

August 26, 2025

Dear Ms. Lancaster:

The South Carolina School for the Deaf and the Blind (SCSDB) respectfully request approval from the Department of Administration, Facilities Management and Property Services (FMPS), to enter into a 10-year lease with BV DRP Synergy for 6,937 rentable square feet of office space at 101 Executive Center Drive, Suites 110 and 120, Columbia, SC 29210. The current lease for this location, which houses the SCSDB Division of Outreach Services, is set to expire on March 31, 2026.

The Division of Outreach Services has maintained its statewide central office in this business park since 1985. This location functions as the primary hub for our comprehensive outreach programs, which deliver critical educational services to children across South Carolina who are deaf, blind, or deafblind. These services include:

- Early intervention
- Vision and hearing services in public schools
- The Deaf-Blind Project
- Braille and large print instructional materials distribution
- Braille production
- A child development center
- Sign language interpreting services and instruction

This office's location along Interstate 26 offers strategic access between our main campus in Spartanburg, our Charleston office, and our Braille production partnership with the South Carolina Department of Corrections at the Leath Correctional Facility in Greenwood.

### **Main Campus**

355 Cedar Springs Road • Spartanburg, SC 29302-4699 • 864-585-7711 • Toll-Free: 1-888-447-2732 • Fax: 864-585-3555 • [www.scsdb.org](http://www.scsdb.org)

### **Division of Outreach Services - Columbia**

101 Executive Center Drive • Suite 120, Saluda Building • Columbia, SC 29210  
803-896-9710 • Toll-Free: 1-800-984-4357 • Fax: 803-896-9848 • [www.scsdb.org](http://www.scsdb.org)

### **Colson Center of Outreach Services - Charleston**

Garden View Office Park • 1064 Gardner Road, Suite 203 • Charleston, SC 29407  
843-212-4334 • Toll-Free: 1-800-984-4357 • Fax: 843-534-5985 • [www.scsdb.org](http://www.scsdb.org)

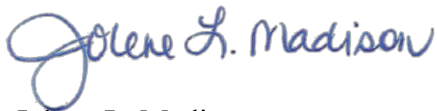


After contacting state agencies to verify that there was no adequate state space available, the Department of Administration solicited for commercial space and four (4) proposals were received and the selected location is the lowest priced offer.

This location continues to meet the accessibility needs of our staff and students, provides adequate office and program space, and includes sufficient parking for our fleet of state vehicles used for direct services. The cumulative cost of the lease during the term is \$1,391,686.29.

Thank you for your consideration of this request and please let me know if you need any additional information.

Sincerely,

A handwritten signature in blue ink that reads "Jolene L. Madison". The signature is written in a cursive, flowing style.

Jolene L. Madison  
President

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AGENCY: Department of Administration  
Facilities Management and Real Property Services

SUBJECT: Proposed Lease  
Medical University of South Carolina  
Office Space at 125 Doughty Street, Suites 100-190, Charleston

The Medical University of South Carolina requests review of its proposal to lease approximately 11,494 square feet of office space located at 125 Doughty Street in Charleston from Roper MOB, LLC.<sup>1</sup> The lease will provide support for the MUSC Department of Psychiatry and other programs. The University has been at this location since 2003, and the current lease expires June 24, 2026.

The Department of Administration conducted a solicitation for various terms following a determination that other state space was not available and received 1 responsive offer.

The term of the proposed lease is 5 years beginning on or about June 25, 2026. The rental rate for the first year of the term is \$443,208 or \$38.56 per square foot. Rent includes taxes, insurance, and operating expenses.

The rental rate will increase by 4% annually beginning in year 2. Total rent over the term is expected to be \$2,400,560. No option to purchase the property is included in the lease.

The Department of Administration reports that lease payments will be made from Institutional Commitment Funds; and the University's submission represents that funding for payments will be sufficient throughout the lease term. The Department of Administration reports that comparable rates for similar commercial space available in the area range from an average rate of \$40.25 to \$45.00 per square foot.

COMMITTEE ACTION:

Review and make recommendation regarding the proposed lease.

ATTACHMENTS:

1. Department of Administration, Facilities Management and Property Services, Agenda Item Worksheet.
2. Letter dated August 12, 2025, of Carly Callaghan, Director of Leasing, Medical University of South Carolina.

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<sup>1</sup> A South Carolina limited liability company in good standing registered with the SC Secretary of State effective June 30, 1997. CT Corporation System of Columbia, SC is registered agent. Private Participant Disclosures were included with the submission.

**JOINT BOND REVIEW COMMITTEE  
AGENDA ITEM WORKSHEET**

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**Meeting Scheduled for: December 2, 2025**

**Regular Agenda**

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**1. Submitted by:**

- (a) Agency: Department of Administration  
(b) Authorized Official Signature:

Ashlie Lancaster

Ashlie Lancaster, Director

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**2. Subject:** Medical University of South Carolina Lease of 125 Doughty Street, Suites 100-190, Charleston, SC

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**3. Summary Background Information:**

The Medical University of South Carolina (Agency) requests approval to continue to lease eleven thousand four hundred ninety-four (11,494) square feet of office space in Charleston from Roper MOB, LLC. This lease will continue to provide support for the MUSC Department of Psychiatry including Addiction Sciences, College of Medicine and the South Carolina Clinical Translational Research Institute (SCCTR). The Agency has been at this location since 2003. The current lease rate is approximately \$36.90 per square foot plus operating expenses in the tenant leased space and expires June 24, 2026. The MUSC Board of Trustees approved this lease at their meeting on August 8, 2025.

After contacting state agencies to verify no adequate State space was available, the Department of Administration solicited for commercial space for various lease terms. There was one (1) proposal received.

The requested lease term is five (5) years and is expected to commence on or about June 25, 2026.

The rent for the first year of the term will be \$443,208.64 or \$38.56 per square foot (rounded) and will include operating costs, taxes and insurance. The rental rate shall escalate 4% annually over the term beginning in year two (2). The following chart sets forth the rent over the term.

<u>TERM</u>	<u>PERIOD: FROM - TO</u>	<u>MONTHLY RENT</u>	<u>ANNUAL RENT</u>	<u>RENT PER SF</u>
YEAR 1	6/25/2026-6/24/2026	\$36,934.05	\$443,208.64	\$38.56
YEAR 2	6/25/2027-6/24/2027	\$38,411.42	\$460,936.99	\$40.10
YEAR 3	6/25/2028-6/24/2028	\$39,947.87	\$479,374.47	\$41.71
YEAR 4	6/25/2029-6/24/2029	\$41,545.79	\$498,549.44	\$43.37
YEAR 5	6/25/2030-6/24/2030	\$43,207.62	\$518,491.42	\$45.11

The total rent to be paid over the term is \$2,400,560.96.

The following chart represents comparable lease rates of similar space in the Charleston area:



<b>Tenant</b>	<b>Location</b>	<b>Rent per SF</b>
MUSC	22 WestEdge Street, Suite 600, Charleston	\$40.25*
Vacant	701 East Bay Street, Charleston	\$45.00+
Vacant	525 East Bay Street, Charleston	\$44.00+

\*Subject to base rent escalations.

+May be subject to base rent escalations and/or operating expense escalations.

The lease has adequate parking on premises and utilizes the Agency's campus parking system. The lease also meets the State space standards with a density of approximately 136 SF per person.

The Agency has adequate funds for the lease according to a Budget Approval Form approved by the Capital Budgeting Office on November 7, 2025. Lease payments will be funded through Institutional Commitment Funds for SCCTR.

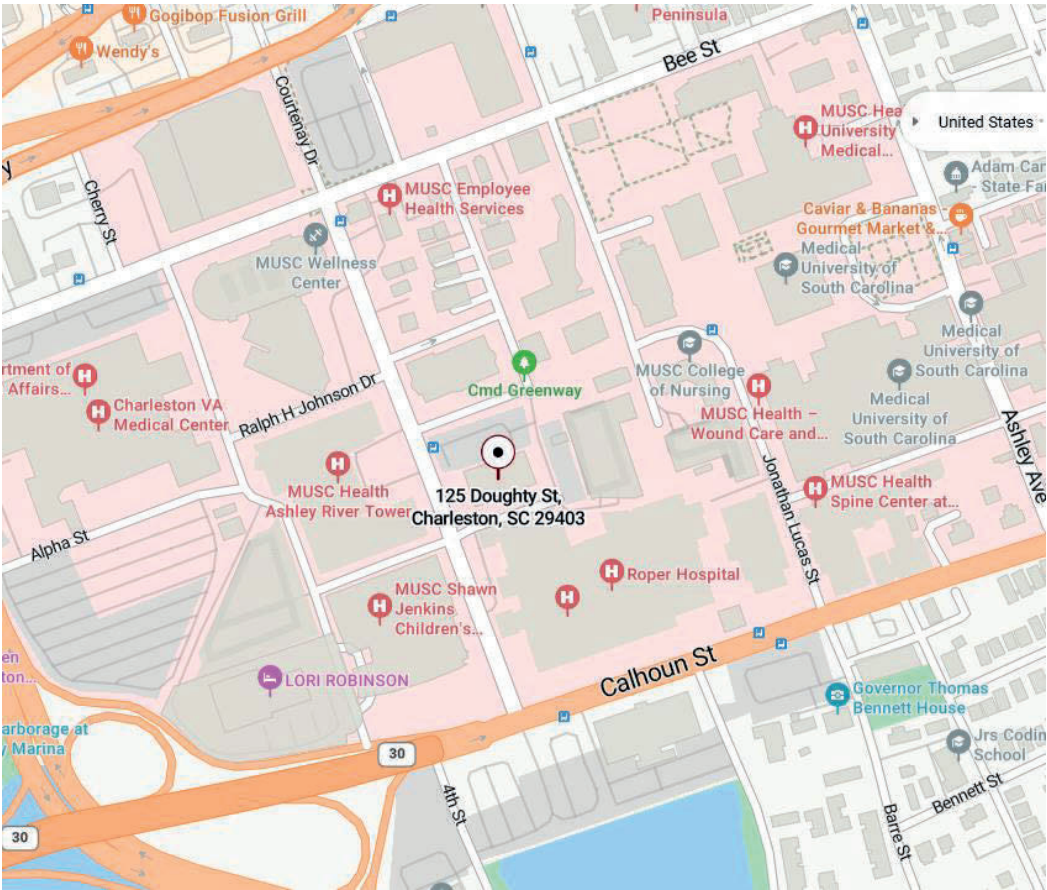
No option to purchase the property is included in the lease.

- 
- 4. What is the JBRC asked to do?** Approve the proposed five-year lease for the Medical University of South Carolina of eleven thousand four hundred ninety-four (11,494) square feet of office space at 125 Doughty Street in Charleston from Roper MOB, LLC.
- 

- 5. What is recommendation of the submitting agency involved** Approve the five-year lease for the Medical University of South Carolina of eleven thousand four hundred ninety-four (11,494) square feet of office space at 125 Doughty Street in Charleston from Roper MOB, LLC.
- 

**6. List of Supporting Documents:**

- (a) Letter from Agency
- (b) Private Participant Disclosure
- (c) Map and Street View of Premises





MUSC Real Estate Management Group  
Real Estate Services - Leasing  
22 WestEdge Street, Suite 300  
Charleston, SC 29403

Ms. Ashlie Lancaster  
South Carolina Department of Administration  
Real Property Services  
1200 Senate Street, 6<sup>th</sup> floor  
Columbia, SC 29201

August 12, 2025

RE: Lease for 125 Doughty Street, Suite 100-190, Charleston, SC, 29403

Dear Ms. Lancaster:

The Medical University of South Carolina requests approval from the Department of Administration, Facilities Management and Property Services (FMPS), to enter a Five (5) year lease with ROPER MOB, LLC for 11,494 usable square feet of office space at 125 Doughty Street. The Medical University of South Carolina's current lease at 125 Doughty Street, Suite 100-190, Charleston, SC 29403 expires on June 26, 2026.

After contacting state agencies to verify that there was no adequate state space available, the Department of Administration solicited commercial space and One (1) proposal was received. After careful consideration, (125 Doughty Street, Suites 100-190, Charleston, SC 29404) was selected because the Tenants are currently occupying the space and they only received one proposal to review. The cumulative cost of the lease during the term is \$2,400,560.96.

Thank you for your consideration of this request and please let me know if you need any additional information.

Sincerely,  
*Carly Callaghan*  
Carly Callaghan  
Director of Leasing  
Medical University of South Carolina  
System Operations  
Real Estate Services- Leasing  
Direct: 843-870-1935

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AGENCY: Department of Administration  
Facilities Management and Real Property Services

SUBJECT: Proposed Lease  
Medical University of South Carolina  
Surface Parking at Hagood/Fishburne Street, Charleston

The Medical University of South Carolina requests review of its proposal to lease 1,143 parking spaces from the City of Charleston located at the Southeast corner of Fishburne Street and Hagood Avenue in Charleston, commonly known as the Fishburne Ballpark or Fishburne-Hagood Lot. The lease will provide support for MUSC Parking Management for employee and student parking. The University has leased parking spaces at this location since 1997, and the current lease expires on May 31, 2026.

The Department of Administration conducted a solicitation for various terms following a determination that other state space was not available and received 3 responsive offers. The selected location was the lowest option.

The lease term is 3 years plus two additional 1-year options for a total possible term of 5 years. The lease is expected to commence on or about June 1, 2026. The rental rate for the first year of the term is \$715,838 or \$52.19 per space. Rent includes taxes, insurance, and operating expenses. The University is responsible for security and keeping the grounds clean, which is estimated to cost \$95,000 annually.

The rental rate will increase based on the CPI-U (all Urban Consumers) capped at 3% annually beginning in year 2. Total rent over the term is expected to be \$3,800,481. No option to purchase the property is included in the lease.

The Department of Administration reports that lease payments will be made from parking revenue funds; and the agency's submission represents that funding for payments will be sufficient throughout the lease term. The Department of Administration reports that comparable rates for similar commercial space available in the area range from an average rate of \$85.00 to \$177.00 per space.

COMMITTEE ACTION:

Review and make recommendation regarding the proposed lease.

ATTACHMENTS:

1. Department of Administration, Facilities Management and Property Services, Agenda Item Worksheet.
2. Letter dated September 11, 2025, of Carly Callaghan, Director of Leasing, Medical University of South Carolina.

**JOINT BOND REVIEW COMMITTEE  
AGENDA ITEM WORKSHEET**

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**Meeting Scheduled for: December 2, 2025**

**Regular Agenda**

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**1. Submitted by:**

(a) Agency: Department of Administration

Ashlie Lancaster

(b) Authorized Official Signature:

Ashlie Lancaster, Director

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**2. Subject:** Medical University of South Carolina Lease of Hagood/Fishburne Street Surface Parking Lot, Charleston, SC

**3. Summary Background Information:**

The Medical University of South Carolina (Agency) requests approval to continue to lease 1,143 parking spaces from the City of Charleston located at the Southeast corner of Fishburne Street and Hagood Avenue in Charleston, commonly known as the Fishburne Ballpark Lot or Fishburne-Hagood Lot. This lease will continue to provide support for MUSC Parking Management for employee and student parking. The Agency has leased parking spaces at this location since 1997. The current lease is at a rate of \$50.67 per space per month, and it expires on May 31, 2026. The MUSC Board of Trustees approved this lease at their October 10, 2025, meeting.

After contacting state agencies to verify no adequate State space was available, the Department of Administration solicited for parking spaces for various lease terms resulting in a total of three (3) responsive proposals. The selected location was the lowest option.

The requested lease term is three (3) years plus two (2) additional one (1) year options for a total possible term of five (5) years. The lease is expected to commence on or about June 1, 2026.

The rent for the first year of the term will be \$715,838.04 or \$52.19 (rounded) per space, per month; and includes operating costs, taxes and insurance. The Agency will be responsible for trash pick-up, security and keeping grounds clean, all of which is estimated to cost \$95,000.00 annually. Beginning in year two (2), the rental rate shall escalate annually based on the CPI-U (all Urban Consumers) capped at 3% annually. The following chart sets forth the maximum possible rent over the term.

<u>TERM</u>	<u>PERIOD: FROM - TO</u>	<u>MONTHLY RENT</u>	<u>ANNUAL RENT</u>	<u>RENT PER SPACE/PER MONTH</u>
YEAR 1	6/1/2026 – 5/31/2027	\$59,653.17	\$715,838.04	\$52.19
YEAR 2	6/1/2027 – 5/31/2028	\$61,442.77	\$737,313.18	\$53.76
YEAR 3	6/1/2028 – 5/31/2029	\$63,286.05	\$759,432.58	\$55.37
OPTION 1	6/1/2029 – 5/31/2030	\$65,184.63	\$782,215.55	\$57.03

OPTION 2	6/1/2030 – 5/31/2031	\$67,140.17	\$805,632.02	\$58.74
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The maximum total rent to be paid over the term, including options, is \$3,800,481.37.

The following chart represents comparable lease rates of similar space in the Charleston area:

Tenant	Location	Per Space Per Month
Vacant*+	5001 LaCross Road, North Charleston	\$85.00
Vacant*+	3775 Azalea Drive, North Charleston	\$110.00
MUSC+	Line/Hagood Parking Lot	\$177.00

\*Proposal received in response to solicitation.

+Subject to base rent escalations.

The Agency has adequate funds for the lease according to a Budget Approval Form approved by the Capital Budgeting Office on September 22, 2025. Lease payments will be funded through parking revenue.

No option to purchase the property is included in the lease.

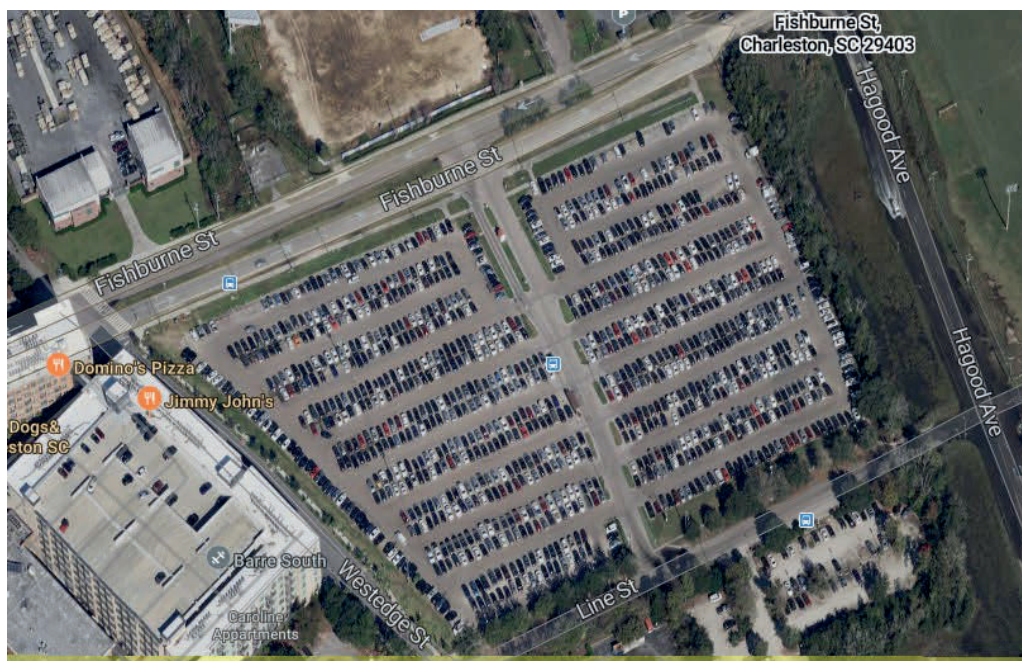
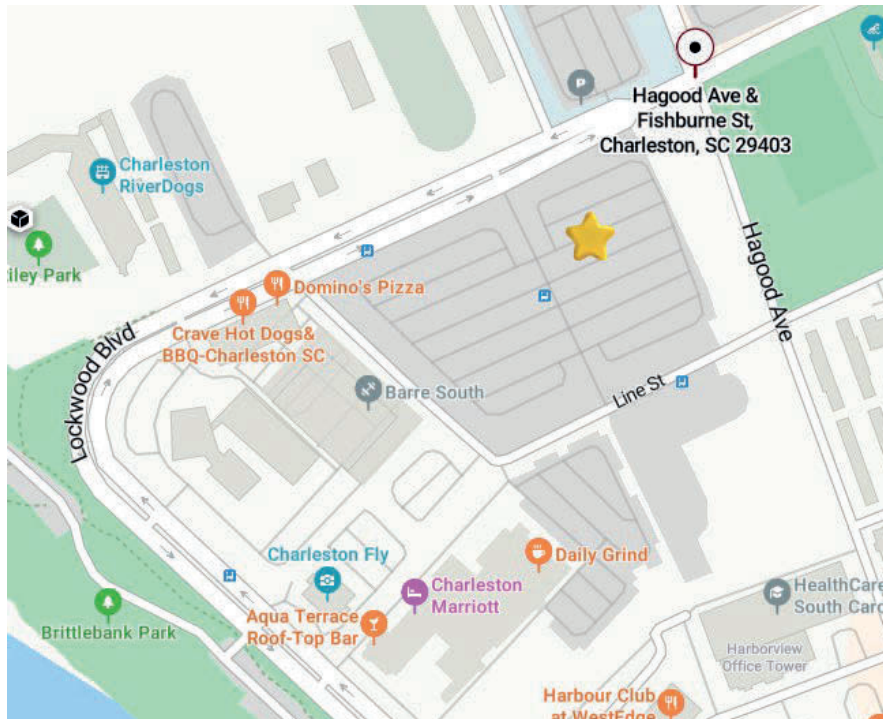
- 
- 4. What is the JBRC asked to do?** Approve the proposed five-year lease term inclusive of options for the Medical University of South Carolina of one thousand one hundred forty-three (1,143) parking spaces at the Fishburne-Hagood lot in Charleston from the City of Charleston.
- 

- 5. What is recommendation of the submitting agency involved** Approve the proposed five-year lease term inclusive of options for the Medical University of South Carolina of one thousand one hundred forty-three (1,143) parking spaces at the Fishburne-Hagood lot in Charleston from the City of Charleston.
- 

**6. List of Supporting Documents:**

- (a) Letter from Agency
- (b) Map and Street view of Premises







MUSC Real Estate Management Group  
Real Estate Services - Leasing  
22 WestEdge Street, Suite 300  
Charleston, SC 29403

Ms. Ashlie Lancaster  
South Carolina Department of Administration  
Real Property Services  
1200 Senate Street, 6<sup>th</sup> floor  
Columbia, SC 29201

September 11, 2025

RE: Lease for Fishburne St & Hagood Ave. [Fishburne Ballpark Parking Lot/Hagood Fishburne Lot], Charleston, SC, 29403

Dear Ms. Lancaster:

The Medical University of South Carolina requests approval from the Department of Administration, Facilities Management and Property Services (FMPS), to enter a Three (3) year lease with Two (2) -One (1) Year Options to Renew with The City of Charleston for 1,143 Parking Spaces at Fishburne St. and Hagood Ave.[Fishburne Ballpark Parking Lot/Hagood Fishburne Lot] The Medical University of South Carolina's current lease at, Fishburne St. and Hagood Ave.[Fishburne Ballpark Parking Lot/Hagood Fishburne Lot] Charleston, SC 29403 expires on May 31, 2026.

After contacting state agencies to verify that there was no adequate state space available, the Department of Administration solicited commercial space and Four (4) proposals were received. After careful consideration, (Fishburne St. and Hagood Ave.[Fishburne Ballpark Parking Lot/Hagood Fishburne Lot]) was selected because the Tenants are currently occupying the space and the parking lot count and rate per space was the best option provided . The cumulative cost of the lease during the Three (3) Year term is \$2,212,53.80, with the additional Two (2) One Year renewal options the cumulative cost is \$3,800,481.37.

Thank you for your consideration of this request and please let me know if you need any additional information.

Sincerely,

Carly Callaghan  
Director of Leasing  
Medical University of South Carolina  
System Operations  
Real Estate Services- Leasing  
Direct: 843-870-1935



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AGENCY: Department of Administration  
Executive Budget Office

SUBJECT: Financing Proposal for Permanent Improvements  
University of South Carolina - Campus Residential Development -  
Sumter Street Sites

The University of South Carolina requests Phase II review to establish the full design and construction budget for its Campus Residential Development at Sumter Street.

Permanent Improvement Project. The project was established in June 2024 with a Phase I budget of \$4,500,000, funded with Housing Maintenance Reserve and Institutional Capital Project funds. This request will replace the source of funds, revise the project scope, and increase the budget to \$185,000,000, funded entirely by proceeds from the issuance of Higher Education Revenue bonds.

The project will demolish the remaining McBryde Quadrangle buildings and construct new buildings on the site complimentary to the Honors College. McBryde will be replaced by a 6-story facility, increasing the bed count from 260 to over 900 beds. The project will also expand the Honors College Residence Hall across Sumter Street by constructing a new 6-story residential wing with approximately 180 beds. Both buildings will provide student residence support spaces including meeting and event space, break rooms, and other student support spaces. The scope revision will remove the development at Brynes to be completed as a separate project.

Contract execution is expected in January 2026 and completion of construction in July 2028.

Higher Education Revenue Bonds. The University proposes funding the permanent improvement with not exceeding \$195,000,000 of Higher Education Revenue Bonds, including expenses associated with issuance of the bonds. The University is authorized pursuant to Chapter 147 of Title 59 (Higher Education Revenue Bond Act) to issue bonds for the purpose of financing or refinancing in whole or in part the cost of acquisition, construction, reconstruction, renovation and improvement of land, buildings, and other improvements to real property and equipment for the purpose of providing facilities serving the needs of the University.

The term of the proposed bonds is anticipated to be 30 years. Exhibit A included in the supporting documentation reflects the debt service requirements for all of the University's existing and proposed Higher Education Revenue Bonds. Exhibit B reflects maximum composite debt service projected at \$40,546,186. Based on current collections, revenue coverage of debt service following issuance of the bonds is projected to range from 1.32 to 4.85 times debt service throughout the term of the University's existing and proposed debt.

Supporting documentation indicates that, while the University intends to pay debt service from Net Revenues, the bonds are secured by both Net Revenues and Additional Funds, as those terms are defined in the University's bond resolutions. The Net Revenues for the fiscal year ended June 30, 2025, totaled \$41,472,000. The Additional Funds comprise essentially all legally available funds of the University and totaled \$1,060,637,000 for the fiscal year ended June 30, 2025. The University states that no increases in student fees or tuition are needed to support the project.

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The full faith and credit of neither the University nor the state will be pledged to the payment of the proposed bonds. Furthermore, no mortgage or lien will be given on any real property of the University.

COMMITTEE ACTION:

1. Review and make recommendation regarding the University's request to establish Phase II full design and construction for the permanent improvement project, to be funded by \$185,000,000 in proceeds from the issuance of Higher Education Revenue Bonds.
2. Review and make recommendation regarding the University's request for issuance of not exceeding \$195,000,000 Higher Education Revenue Bonds.

ATTACHMENTS:

1. Department of Administration, Executive Budget Office Agenda Item Worksheet.
2. Letter dated November 3, 2025, of Mr. Gary T. Pope, Jr., Pope Flynn, LLC, Bond Counsel.
3. Bond Information Report and Exhibits.

## JOINT BOND REVIEW COMMITTEE AGENDA ITEM WORKSHEET

Meeting Scheduled for: December 2, 2025

Regular Agenda

**1. Submitted By:**

- (a) Agency: Department of Administration  
(b) Authorized Official Signature:

*Ashlie Lancaster*  
Ashlie Lancaster, FMPS Director

**2. Subject:**

University South Carolina Columbia – Campus Residential Development - Sumter Street Sites

**3. Summary Background Information:**

Project: University of South Carolina - Columbia  
H27.6158: Campus Residential Development - Sumter Street Sites

Request: Change Source of Funds, Revise Scope and Establish Phase II Full Construction Budget to demolish existing buildings and to construct a new building and a building addition.

Included in CPIP: Yes – 2025 CPIP Priority 2 of 15 in FY26 (estimated at \$300,000,000)  
Phase I Approval: June 2024 (estimated at \$300,000,000) (JBRC /SFAA)

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Revenue Bonds, Housing				185,000,000	185,000,000
Other, Housing Maintenance Reserve	3,000,000		3,000,000	(3,000,000)	
Other, Institutional Capital Project	1,500,000		1,500,000	(1,500,000)	
All Sources	<u>4,500,000</u>		<u>4,500,000</u>	<u>180,500,000</u>	<u>185,000,000</u>

Summary of Work: The project was established to demolish the remaining McBryde Quadrangle buildings, construct a new building on the McBryde site that is taller to complement the Honors College and increase the bed count on the site, and construct the third wing at the Honors College Residence Hall across Sumter Street from the McBryde site. The project also previously included potential redevelopment at the Byrnes site. The revised scope removes the development at the Byrnes site from the project scope. It will be developed separately in the future as a separate project once the scope and fund source(s) are fully identified. The various development components will be phased over many years. The roof has been evaluated by the Department of Administration and has been determined to comply with JBRC policy and will come with the minimum 20-year material and workmanship warranty.

Rationale: The McBryde Quadrangle buildings have exceeded their service life and are the highest Housing priorities to replace with new construction, per the university.

Facility Characteristics: The remaining McBryde Buildings to be demolished total 68,046 gross square feet, were constructed in 1955 (70 years old), and have 260 beds. The new 6-story student residence building will be 240,734 square feet on the site and will have approximately 896 student beds. The new building will conform to the original

footprint of the McBryde Quadrangle. The existing Honors College Residence Hall is 192,724 square feet, was constructed in 2009, and currently has 537 student beds. The expansion of the Honors College Residence Hall with the addition of a 6-story third wing will add 55,396 square feet and increase the student bed count by approximately 190 beds for a total of 727 beds. Approximately 1,086 residential students, and thousands additional will use the new community, meeting, administrative and study spaces provided by this project.

**Financial Impact:** This phase of the project will be funded from Housing Revenue Bonds (to be issued). The project is expected to result in an increase of \$1,450,000 (years 1 thru 3) in annual operating expenditures. The new building and building expansion will be constructed to meet Two Green Globes certification standards with anticipated energy savings of \$7,220,344 over 30-years. No student fees or tuition will be increased as a consequence of the project. While not being utilized to fund this project, a portion of tuition is designated for capital improvements, currently \$40 per student per semester, and has not increased between the academic years 2021-2022 to 2025-2026. Housing fees are charged to residential students, an average of the various rates is \$4,608 per student per semester and has increased from \$3,856 for the academic years 2021-2022 to 2025-2026.

**Full Project Estimate:** \$185,000,000 funded from Housing Revenue Bond Funds. Contract execution is expected in February 2026 and completion of construction in July 2028.

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#### **4. What is JBRC asked to do?**

Consider approval of the Permanent Improvement Project Change Source of Funds, Revise Scope, and establish Phase II request.

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#### **5. What is the recommendation of the Department of Administration?**

The item is complete and ready for JBRC review.

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#### **6. List of Supporting Documents:**

1. Permanent Improvement Campus Residential Development - Sumter Street Sites
2. Bond Information Report



Pope Flynn, LLC  
1411 Gervais Street, Suite 300  
Post Office Box 11509 (29211)  
Columbia, SC 29201  
MAIN 803.354.4900  
FAX 803.354.4899  
www.popeflynn.com

November 3, 2025

Ms. Catherine O. Hart  
Director of Research  
Joint Bond Review Committee  
312 Gressette Building  
Columbia, South Carolina 29201

Re: Not Exceeding \$195,000,000 of University of South Carolina Higher Education Revenue Bonds

Dear Catherine:

The University of South Carolina (the "University") plans to request project review and approval of proposed improvements related to its Campus Residential Development – Sumter Street Project at the December 2, 2025 Joint Bond Review Committee and December 9, 2025 State Fiscal Accountability Authority meetings, and in connection with such request will propose that a portion of the budget for such project include proceeds of the above-referenced bonds (the "Bonds"). In accordance with the policy adopted by the Joint Bond Review Committee on October 7, 2014, as amended on September 13, 2016, regarding any agency or institution request for a project approval that results in the addition of bond funds to the project budget, please find enclosed the required documentation detailing the proposed financing of the proposed project. On behalf of the University, we respectfully request that the Joint Bond Review Committee consider the request for the use of proceeds from the proposed Bonds in connection with its consideration of the proposed project.

Please let us know should you require anything further or if you have any questions regarding the enclosed.

Very truly yours,

A handwritten signature in blue ink, appearing to read 'G. T. Pope, Jr.', is written over a light blue circular stamp.

Gary T. Pope, Jr.

c: Mandy Kibler, Associate Vice President for Administration and Finance & University Controller,  
University of South Carolina  
Jackie D. Hipes, Director, Debt Management Division, Office of State Treasurer  
Jennifer LoPresti, Capital Budgeting Manager, Executive Budget Office

Enclosures

## University of South Carolina Bond Information Report

### Prepared in Connection with the Proposed Authorization of Not Exceeding \$195,000,000 of University of South Carolina Higher Education Revenue Bonds

#### Campus Residential Development – Sumter Street Project

*Amount and Type of Bond.* The University of South Carolina (the “University”) is seeking review by the Joint Bond Review Committee and approval by the South Carolina State Fiscal Accountability Authority for the issuance of not exceeding \$195,000,000 of University of South Carolina Higher Education Revenue Bonds (the “Bonds”), the proceeds of which may be applied for the purposes of: (1) paying the costs of, and reimbursing the University for capital expenditures previously made in connection with, the Project (as defined below), including capitalized interest on the Bonds, if any; (2) paying the costs of issuance of the Bonds, including the premium on any Municipal Bond Insurance Policy or debt service reserve fund funding substitute; and (3) paying the principal of and interest on any bond anticipation notes whether at maturity or early redemption. The Project is defined to include the costs to acquire, construct, reconstruct, improve, and equip the Campus Residential Development – Sumter Street Project, comprising the replacement of the University’s existing McBryde Residential Hall and an expansion of the University’s Honors Hall, and to provide infrastructure and improvements related thereto, in order to provide additional student housing and space for complementary uses on the Columbia, South Carolina campus of the University (collectively, the “Project”).

*Revenues Pledged to Pay the Bonds.* The University’s Higher Education Revenue Bonds are payable from, and are secured by a pledge of, the Net Revenues and the Additional Funds (“Pledged Revenues”). Under the bond resolution governing the issuance of the University’s Higher Education Revenue Bonds the University must maintain Net Revenues at least equal to composite debt service on all outstanding Higher Education Revenue Bonds. The Net Revenues for the fiscal year ended June 30, 2025, totaled \$41,472,000. The estimated debt service requirements on all existing, authorized, and proposed Higher Education Revenue Bonds are attached as Exhibit A. Exhibit B reflects estimated maximum annual debt service of \$40,546,186 in the fiscal year ending June 30, 2031, and anticipated pro forma Net Revenues coverage ranging from 1.32 to 4.85 times pro forma debt service.

*New Revenue Generation.* The primary purpose of this project is to expand existing and replace aging and obsolete student housing on the Columbia Campus. The project will construct approximately 1,100 additional beds that will be used to meet the existing needs for freshman and limited upper-classmen housing. The Project is expected to generate additional Net Revenues ranging from \$8,971,500 to \$17,351,796 over the life of the Project based on the increase in bed count and applicable housing rates.

*Other Funds Available to Pay Bonds.* While the University intends to pay debt service on the Bonds from the Net Revenues, both the Net Revenues and the Additional Funds comprise the Pledged Revenues that secure the Bonds. The Additional Funds comprise essentially all legally available funds of the University and totaled \$1,060,637,000 for the fiscal year ended June 30,

2025. Pursuant to Section 59-147-110 of the Code of Laws of South Carolina 1976, as amended, the Bonds are not payable from State appropriations or student tuition and fees pledged to the payment of State Institutions Bonds. Also, certain specific revenues pledged to the payment of specific obligations, such as Athletic Facilities Revenue Bonds, are likewise unavailable for payment on the Bonds and are not a component of Pledged Revenues.

*No Special Student Fees. No Credit of the State. No Mortgage.* The University does not currently impose a Special Student Fee, and no such fee is currently contemplated, in connection with the payment of the Bonds. Neither the full faith and credit of the University nor the State of South Carolina has been pledged to the payment of Higher Education Revenue Bonds. Further, no mortgage or lien has been or will be given on any real property of the University.

Prepared November 3, 2025 in connection with:

December 2, 2025 Joint Bond Review Committee Meeting

December 9, 2025 State Fiscal Accountability Authority Meeting

Exhibit A

University of South Carolina  
Higher Education Revenue Bonds - Debt Service

Fiscal Year	Existing Debt Service	Debt Service on Proposed Bond Issue				Total Composite Debt Service
		Debt Service On Authorized but Unissued Bonds	Principal	Interest	Capitalized Interest	
6/30/2026	\$ 30,882,148	\$ -	\$ -	\$ -	\$ -	\$ 30,882,148
6/30/2027	30,921,850	-	-	7,838,316	(5,000,000)	33,760,166
6/30/2028	28,407,600	-	-	7,838,316	(5,000,000)	31,245,916
6/30/2029	28,408,600	-	4,285,000	7,838,316	-	40,531,916
6/30/2030	28,408,350	-	4,395,000	7,729,477	-	40,532,827
6/30/2031	28,420,100	-	4,510,000	7,616,086	-	40,546,186
6/30/2032	27,251,350	-	4,625,000	7,501,983	-	39,378,333
6/30/2033	27,247,800	-	4,740,000	7,383,120	-	39,370,920
6/30/2034	26,424,050	-	4,865,000	7,259,406	-	38,548,456
6/30/2035	24,858,325	-	4,995,000	7,128,538	-	36,981,863
6/30/2036	19,953,375	-	5,130,000	6,992,174	-	32,075,549
6/30/2037	19,958,875	-	5,275,000	6,846,995	-	32,080,870
6/30/2038	19,961,425	-	5,440,000	6,682,257	-	32,083,682
6/30/2039	15,705,425	-	5,625,000	6,500,180	-	27,830,605
6/30/2040	14,829,925	-	5,825,000	6,300,155	-	26,955,080
6/30/2041	13,160,925	-	6,040,000	6,083,698	-	25,284,623
6/30/2042	13,162,613	-	6,270,000	5,852,487	-	25,285,100
6/30/2043	13,159,488	-	6,520,000	5,602,251	-	25,281,739
6/30/2044	11,535,800	-	6,790,000	5,334,149	-	23,659,949
6/30/2045	11,536,300	-	7,075,000	5,047,000	-	23,658,300
6/30/2046	11,536,300	-	7,380,000	4,741,926	-	23,658,226
6/30/2047	11,539,800	-	7,705,000	4,418,977	-	23,663,777
6/30/2048	11,540,400	-	8,060,000	4,064,085	-	23,664,485
6/30/2049	11,535,800	-	8,430,000	3,692,841	-	23,658,641
6/30/2050	11,540,600	-	8,820,000	3,304,555	-	23,665,155
6/30/2051	11,538,800	-	9,225,000	2,898,306	-	23,662,106
6/30/2052	-	-	9,650,000	2,473,403	-	12,123,403
6/30/2053	-	-	10,100,000	2,022,844	-	12,122,844
6/30/2054	-	-	10,575,000	1,551,275	-	12,126,275
6/30/2055	-	-	11,065,000	1,057,529	-	12,122,529
6/30/2056	-	-	11,585,000	540,904	-	12,125,904
Totals	<u>\$ 503,426,024</u>	<u>\$ -</u>	<u>\$ 195,000,000</u>	<u>\$ 160,141,552</u>	<u>\$ (10,000,000)</u>	<u>\$ 848,567,576</u>



Exhibit B

University of South Carolina  
Higher Education Revenue Bonds - Coverage

Fiscal Year	Composite Debt		Coverage Ratio Based				Pro Forma Coverage Ratio
	Service	FY25 Net Revenues	on FY25 Net Revenues	Pro Forma Net Revenues	Total Pro Forma Net Revenues*		
6/30/2026	\$ 30,882,148	\$ 41,472,000	1.34	\$ -	\$ 41,472,000		1.34
6/30/2027	33,760,166	41,472,000	1.23	8,971,500	50,443,500		1.49
6/30/2028	31,245,916	41,472,000	1.33	8,971,500	50,443,500		1.61
6/30/2029	40,531,916	41,472,000	1.02	12,101,000	53,573,000		1.32
6/30/2030	40,532,827	41,472,000	1.02	12,118,980	53,590,980		1.32
6/30/2031	40,546,186	41,472,000	1.02	12,289,196	53,761,196		1.33
6/30/2032	39,378,333	41,472,000	1.05	12,461,673	53,933,673		1.37
6/30/2033	39,370,920	41,472,000	1.05	12,636,440	54,108,440		1.37
6/30/2034	38,548,456	41,472,000	1.08	12,813,521	54,285,521		1.41
6/30/2035	36,981,863	41,472,000	1.12	12,992,946	54,464,946		1.47
6/30/2036	32,075,549	41,472,000	1.29	13,174,739	54,646,739		1.70
6/30/2037	32,080,870	41,472,000	1.29	13,358,930	54,830,930		1.71
6/30/2038	32,083,682	41,472,000	1.29	13,545,545	55,017,545		1.71
6/30/2039	27,830,605	41,472,000	1.49	13,734,612	55,206,612		1.98
6/30/2040	26,955,080	41,472,000	1.54	13,926,159	55,398,159		2.06
6/30/2041	25,284,623	41,472,000	1.64	14,120,215	55,592,215		2.20
6/30/2042	25,285,100	41,472,000	1.64	14,316,808	55,788,808		2.21
6/30/2043	25,281,739	41,472,000	1.64	14,515,967	55,987,967		2.21
6/30/2044	23,659,949	41,472,000	1.75	14,717,719	56,189,719		2.37
6/30/2045	23,658,300	41,472,000	1.75	14,922,094	56,394,094		2.38
6/30/2046	23,658,226	41,472,000	1.75	15,129,122	56,601,122		2.39
6/30/2047	23,663,777	41,472,000	1.75	15,338,831	56,810,831		2.40
6/30/2048	23,664,485	41,472,000	1.75	15,551,252	57,023,252		2.41
6/30/2049	23,658,641	41,472,000	1.75	15,766,412	57,238,412		2.42
6/30/2050	23,665,155	41,472,000	1.75	15,984,343	57,456,343		2.43
6/30/2051	23,662,106	41,472,000	1.75	16,205,075	57,677,075		2.44
6/30/2052	12,123,403	41,472,000	3.42	16,428,637	57,900,637		4.78
6/30/2053	12,122,844	41,472,000	3.42	16,655,059	58,127,059		4.79
6/30/2054	12,126,275	41,472,000	3.42	16,884,373	58,356,373		4.81
6/30/2055	12,122,529	41,472,000	3.42	17,116,608	58,588,608		4.83
6/30/2056	12,125,904	41,472,000	3.42	17,351,796	58,823,796		4.85

\* Includes FY25 Net Revenues held constant plus pro-forma Net Revenues based off of the Project

AGENCY: Department of Administration  
Capital Budget Office

SUBJECT: Permanent Improvement Project Proposals

The Department of Administration has submitted 50 proposals for Permanent Improvement Projects on behalf of agencies, summarized as follows:

	Items	Existing Budget	Proposed Budget Change	Estimated Total Project Cost
Higher Education				
H15 - College of Charleston	3	22,750,000	7,720,000	41,970,000
H18 - Francis Marion University	1	140,000	130,000	9,000,000
H24 - South Carolina State University	2	620,000	30,680,000	95,000,000
H29 - University of South Carolina - Aiken	1	-	125,250	8,350,000
H47 - Winthrop University	1	-	600,000	40,000,000
H59 - Midlands Technical College	1	-	45,000	5,920,000
H59 - Piedmont Technical College	2	129,500	12,686,184	12,815,684
H59 - Spartanburg Community College	1	-	20,000	20,000
H59 - Tri-County Technical College	2	465,000	30,587,500	34,500,000
H59 - Trident Technical College	2	37,533,144	3,190,000	46,833,144
H59 - York Technical College	2	-	5,300,000	17,000,000
Higher Education Total	18	61,637,644	91,083,934	311,408,828
Agencies				
D10 - South Carolina Law Enforcement Division	1	20,000	20,000	40,000
D50 - Department of Administration	7	953,563	1,186,161	8,185,699
E24 - Office of the Adjutant General	1	15,450	6,000	951,450
E26 - Department of Veterans Affairs	3	33,500	7,402,753	7,436,253
H73 - Vocational Rehabilitation Department	2	40,000	2,099,420	2,139,420
H95 - State Museum Commission	1	-	15,000,000	15,000,000
J12 - Department of Behavioral Health & Development	2	-	338,443	1,387,277
N12 - Department of Juvenile Justice	1	-	5,000,000	5,000,000
P12 - Forestry Commission	1	-	80,000	36,354,500
P24 - Department of Natural Resources	9	67,920	2,386,280	7,354,200
P28 - Department of Parks, Recreation, and Tourism	3	4,317,315	3,196,066	8,720,006
P36 - Patriots Point Development Authority	1	-	1,183,584	1,183,584
Agencies Total	32	5,447,748	37,898,707	93,752,389
Grand Total	50	67,085,392	128,982,641	405,161,217

COMMITTEE ACTION:

Review and make recommendation of proposed permanent improvement projects for consideration by the State Fiscal Accountability Authority or Department of Administration, as applicable.

ATTACHMENTS:

1. Department of Administration, Capital Budget Office, Permanent Improvements  
Proposed by Agencies - Summary 3-2026 covering the period July 22, 2025, through  
September 18, 2025.

1. Project: College of Charleston  
 H15.9678: Berry Residence Hall and Honors Program Renovation
- Request: Increase Phase II Full Construction Budget to continue completing interior renovations to the residence hall.
- Included in CPIP: Yes – 2025 CPIP Priority 2 of 4 in FY26 (estimated at \$23,000,000)
- Phase I Approval: May 2022 (estimated at \$23,000,000) (SFAA)
- Phase II Approval: March 2023 (estimated at \$23,000,000) (SFAA)
- Decrease Budget & Revise Scope Approval: December 2023 (this portion estimated at \$11,000,000) (SFAA)
- Phase II Increase Approval: April 2025 (this portion estimated at \$17,000,000) (SFAA)
- Supporting Details: Pages 1-16

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Auxiliary Housing Revenues	475,000	11,425,000	11,900,000	6,000,000	17,900,000
Other, Auxiliary Housing Revenues (transfer from H18-9680)		1,100,000	1,100,000		1,100,000
Other, Capital Improvement Project	100,000	3,900,000	4,000,000		4,000,000
All Sources	<u>575,000</u>	<u>16,425,000</u>	<u>17,000,000</u>	<u>6,000,000</u>	<u>23,000,000</u>

Summary of Work: This project was established to be completed in three annualized portions to address mechanical, electrical, and plumbing issues, upgrade elevators, interior refresh, and replace roofs and windows. The first portion was approved and included a complete redesign of the ground floor Honors College classrooms, programming, and supporting administrative offices. Additionally, exterior brick/stucco repairs, window resealing, landscaping, and roof replacement was also included. The new roof was evaluated by the Department of Administration and was determined to comply with JBRC policy and came with the minimum 20-year material and workmanship warranty. The second portion was approved and included the replacement of HVAC systems and fan coil units in each student resident suite. The first and second portions are both completed. This request will add funds for the third portion of the project, which will include the residence hall fire/life safety and security system upgrades, technology cabling, signage, furniture, and appliances.

Rationale: This project is being completed in annualized portions due to funding availability, and to allow the facility to be occupied during the fall and spring semesters to maintain the required bed space. Originally, the university loaded the full budget for all 3 annualized portions but subsequently reduced the budget in December 2023 to free up funds for use on other projects since they could only do work in this building during the summer months. The last significant renovation to the building was in 2003.

Facility Characteristics: Berry Residence Hall is a 183,514 six-level 630-bed residence hall constructed in 1989 (36 years old). Floor one will be used to centralize and expand the Honors College classrooms, programming, and supporting administrative offices, including the Faculty Fellow Program, Advising Center, Nationally Competitive Awards, and Undergraduate Research and Creative Activities. Floors two and three will house Honors College students. Floors four through six will house general student population.

- Financial Impact: This increase will be funded from Auxiliary Housing Revenues (uncommitted balance \$18.19 million at September 10, 2025). Housing revenues are generated primarily through the Student Housing Fee which is paid by students who reside on campus. The fee varies based on amenities, condition, and age of the residence. Housing fees are charged to residential students, an average of the various rates is \$4,283 per student per semester and has increased from \$3,150 between the academic years 2021-2022 to 2025-2026. The revenues are used solely for the operation, maintenance, renovation, repair, and debt service of this specific auxiliary enterprise. The renovations to the building will be constructed to meet Two Green Globes certification standards with an anticipated energy savings of \$5,999,422 over 30 years. The project is expected to result in a decrease of \$735,962 (year 1), \$758,041 (year 2), and \$780,782 (year 3), in annual operating expenditures. No student fees or tuition will be increased as a consequence of the project. Previous portions of this project were also funded with Capital Improvement Project Funds. A portion of tuition is designated for capital improvements, currently \$906 per student per semester, and has not changed between academic years 2021-2022 to 2025-2026. Currently pledged for debt service is \$622 of the \$906. The remainder of the fee, \$284, funds ongoing capital projects and maintenance.
- Full Project Estimate: \$23,000,000 funded from Auxiliary Housing Revenue and Capital Improvement Project Funds. Contract execution for this portion of the project is expected in May 2026 and completion of construction in August 2027.

2. Project: College of Charleston  
 H15.9679: 58 George Street Renovation
- Request: Increase Phase II Full Construction Budget to cover higher than anticipated bid costs to complete repairs and construct a small addition to the Barnard Elliot House in Charleston.
- Included in CPIP: No – The need for the increase was unknown during the 2025 CPIP submission process.
- Phase I Approval: December 2022 (estimated at \$5,750,000) (SFAA)
- Phase II Approval: March 2024 (estimated at \$5,750,000) (SFAA)
- Supporting Details: Pages 17-34

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Capital Improvement Project	143,750	4,979,155	5,122,905	1,700,000	6,822,905
Other, Donation		627,095	627,095		627,095
All Sources	<u>143,750</u>	<u>5,606,250</u>	<u>5,750,000</u>	<u>1,700,000</u>	<u>7,450,000</u>

Summary of Work: The project will include full interior and exterior renovations, structural repairs, roof replacement, infrastructure modernization, demolition of two small building additions, and construction of a 2,462 square foot modern building addition. The renovated original structure will contain offices, communal space, and meeting/seminar rooms for students and staff. The building addition will integrate modern infrastructure including a passenger elevator, ADA compliant restrooms, infrastructure support spaces, code compliant circulation, flexible event space, interview rooms, offices, and a conference room. The new roof has been evaluated by the Department of Administration and has been determined to comply with JBRC policy and will come with the minimum 20-year material and workmanship warranty.

Rationale: Due to inflation and market volatility, the cost of goods and labor has escalated from pre-bid estimates. The George Street location has significant structural issues with temporary indoor shoring to support the center of the building. The building was taken offline in 2015 due to structural instability and remains vacant. For the building to be re-occupied, repairs need to be made. This building is historically protected and cannot be demolished. The existing two additions do not meet the end user's needs and would not be able to accommodate modern mechanical or electrical, or ADA compliance with an elevator, and they have substantial termite damage.

Facility Characteristics: The original Barnard Elliot House is 3,902 square feet and was constructed in 1803 (222 years old). After the original construction, two small building additions totaling 2,425 square feet were added bringing the building size to 6,327 square feet. The two additions will be demolished in this project. A new 2,462 square foot building addition will be constructed. No significant improvements have been made to the building in 37+ years. After renovations are complete the building will provide a new centrally located home for the Edward J. Tuccio '91 Student Success Center and Center for Civic Engagement. The project will benefit 10,880 students, 852 faculty, 1,094 staff, clients, visitors, parents and potential students.

Financial Impact: This increase will be funded from Other, Capital Improvement Project (uncommitted balance \$7 million at August 28, 2025). Revenue to the Capital Improvement Project fund is generated by the Capital Improvement Fee that exceeds current annual debt service related to bonds. The project is expected to result in a decrease of \$2,000 (year 1), \$2,060 (year 2), and \$2,122 (year 3), in annual operating expenditures. No student fees or tuition will be increased as a consequence of the project. A portion of tuition is designated for capital

improvements, currently \$906 per student per semester, and has not changed between academic years 2021-2022 to 2025-2026. Currently pledged for debt service is \$622 of the \$906. The remainder of the fee, \$284, funds ongoing capital projects and maintenance.

Full Project Estimate: \$7,450,000 funded from Capital Improvement Project and Donation funds. Contract execution is expected in December 2025 and completion of construction in December 2026.

3. Project: College of Charleston  
 H15.9691: 24 North Market Street Land Acquisition
- Request: Establish Preliminary Land Acquisition for the purpose of investigating the acquisition of a building and +/- 0.67 acres in Charleston County.
- Included in CPIP: Yes – 2025 CPIP Priority 28 of 28 in FY26 (estimated at \$30,000,000 for this component and others – this component estimated at \$11,500,000)
- Supporting Details: Pages 35-52

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Capital Improvement Project				20,000	20,000
All Sources				<u>20,000</u>	<u>20,000</u>

Rationale: The college is seeking a location to build a new School of Business building. The School of Business is growing, and the current building can no longer accommodate the program. Once a new building is complete, the old School of Business building will be repurposed for use by other programs.

Characteristics: The property is located on the corner of North Market and East Bay streets. The property includes a 3 story 53,600 square foot brick building constructed in 1985 (40 years old).

Financial Impact: The property is offered by 24 N. Market Street, LLC for the proposed purchase price of \$11,500,000. The due diligence activities will be funded from Other, Capital Improvement Project (uncommitted balance \$7 million at August 28, 2025). Revenue to the Capital Improvement Project fund is generated by the Capital Improvement Fee that exceeds current annual debt service related to bonds. If acquired, the building on the property will be demolished for an estimated cost of \$5,000,000, and a new building will be constructed, all part of a separate project. The project is expected to result in an increase of \$175,544 (year 1), \$180,810 (year 2), and \$186,235 (year 3), in annual operating expenditures. No student fees or tuition will be increased as a consequence of the project. A portion of tuition is designated for capital improvements, currently \$906 per student per semester, and has not changed between academic years 2021-2022 to 2025-2026. Currently pledged for debt service is \$622 of the \$906. The remainder of the fee, \$284, funds ongoing capital projects and maintenance.

Full Project Estimate: \$11,520,000 (internal). The acquisition will be funded from a private donation.



4. Project: Francis Marion University  
H18.9593: Leatherman Science Facility and McNair Science Building Renovation
- Request: Increase Phase I Pre-Design Budget to procure a construction manager at risk for the completion of interior and exterior renovations to the science buildings.
- Included in CPIP: Yes – 2025 CPIP Priority 3 of 4 in FY26 (estimated at \$9,000,000)
- Phase I Approval: December 2024 (estimated at \$7,000,000) (SFAA)
- Supporting Details: Pages 53-60

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY25 Appropriated State, Proviso 118.20 (B)(11), (Leatherman Science Facility/McNair Science Building Renovation)	140,000		140,000	130,000	270,000
All Sources	<u>140,000</u>		<u>140,000</u>	<u>130,000</u>	<u>270,000</u>

Summary of Work: The project will replace mechanical systems, make safety and regulatory compliance improvements, renovate classrooms, and replace bathroom finishes, fixtures, and partitions.

Rationale: The university concluded that the Construction Manager at Risk procurement method is preferred because it provides the university with the most timely, economical, and successful means for completion of the project. The Office of the State Engineer has approved this procurement method. The mechanical upgrades will improve energy efficiency, air quality, and climate control. Life safety enhancements will ensure the facilities meet modern fire, electrical, and accessibility codes. Classroom renovations will support contemporary teaching strategies.

Facility Characteristics: The McNair Science Building is 75,736 square feet and was constructed in 1972 (53 years old). The Leatherman Science Facility is 83,945 square feet and was constructed in 1994 (31 years old). The McNair Science Facility is utilized as classroom, lab, and office space for the Math, Biology, Chemistry, and Physics /Engineering programs. The Leatherman Science Building is utilized as classroom, lab, and office space for Biology, Chemistry, and Physics /Engineering programs. An estimated 750 students, faculty, and staff utilize each facility per semester.

Financial Impact: This phase of the project will be funded from FY25 Appropriated State (nonrecurring) Funds (uncommitted balance \$2 million at September 30, 2024). The project is expected to result in a decrease of \$200,000 (years 1 thru 3) in annual operating expenditures. No student fees or tuition will be increased as a consequence of the project. While not being utilized to fund this project, a portion of tuition is designated for capital improvements, currently \$200 per student per semester, and has not changed between academic years 2021-2022 to 2025-2026.

Full Project Estimate: \$9,000,000 (internal). Phase II to be funded from \$5,000,000 in Capital Reserve and \$3,730,000 in Appropriated State (nonrecurring) Funds. The Phase I amount is 3% of the estimated cost to complete the project and the additional amount will be used to cover the Construction Manager at Risk procurement method. The project was established at Phase I in December 2024 and anticipated to be fully funded with legislatively authorized funds that were not received until FY26.

5. Project: South Carolina State University  
H24.9673: Smith Hammond Middleton Convocation Center Replacement
- Request: Establish Phase I Pre-Design Budget to construct a new convocation center.
- Included in CPIP: Yes – 2025 CPIP Priority 5 of 7 in FY26 (estimated at \$60,000,000)
- Supporting Details: Pages 61-68

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Student Housing Improvement				1,300,000	1,300,000
All Sources				<u>1,300,000</u>	<u>1,300,000</u>

Summary of Work: The project will demolish Staley Hall and the Smith Hammond Middleton Convocation Center and construct a replacement facility on the site of the existing Smith Hammond Middleton Convocation Center. The new building will include classrooms, office space, and support spaces to support programs. All roofing material options will be evaluated during the Phase I process. The building will be designed to meet Two Green Globes certification standards.

Rationale: The buildings are outdated with multiple deferred maintenance issues and are not ADA compliant.

Facility Characteristics: Smith Hammond Middleton Convocation Center is 73,307 square feet and was constructed in 1968 (57 years old). Staley Hall is 31,715 square feet, was constructed in 1954 (71 years old) and is no longer utilized as a residence hall. The new building to be constructed will be approximately 120,500 square feet. It will be shared by the College of Education and Athletics schools and will also serve as the University's Convocation Center. The estimated capacity is approximately 4,000 to 5,000 students.

Financial Impact: This phase of the project will be funded from Other, Student Housing Improvement Funds (uncommitted balance \$4.82 million at September 18, 2025). The Student Housing Improvement fund was created with funds gained from the forgiveness of the last Historical Black College and University Capital Financing program by the U.S. Department of Education. The intent behind the creation of the Housing Improvement Fund was for the account to be funded by the excess revenue generated by student housing fees not spent on current maintenance and improvement projects. The project is expected to result in an increase of \$290,700 (years 1 thru 3), in annual operating expenditures. No student fees or tuition will be increased as a consequence of the project. While not being utilized to fund this project, a portion of tuition is designated for capital improvements, currently \$752 per student per semester, and has decreased from \$1,123 between academic years 2021-2022 to 2025-2026.

Full Project Estimate: \$65,000,000 (internal). Phase II will be funded from \$5,000,000 in Appropriated State (nonrecurring) and \$58,700,000 in Appropriated State (nonrecurring) Funds to be requested in the FY26- FY27 budget process. If additional funding is not received to complete the project it will not move forward as there is not an alternate fund source available to complete the project. The Phase I amount requested is 2.00% of the estimated cost to complete the project and the additional amount will be used to cover the Construction Management at Risk procurement method.

6. Project: South Carolina State University  
 H24.9670: Whitaker Library Replacement
- Request: Establish Phase II Full Construction Budget to construct a replacement library.
- Included in CPIP: Yes – 2025 CPIP Priority 4 of 7 in FY26 (estimated at \$30,319,310)
- Phase I Approval: April 2025 (estimated at \$30,000,000) (SFAA)
- Supporting Details: Pages 69-88

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY25 Appropriated State, Proviso 118.20 (B)(13), (Replacement of the Whittaker Library)	620,000		620,000	24,380,000	25,000,000
FY25 Capital Reserve (10). (Replacement of the Whittaker Library)				5,000,000	5,000,000
All Sources	<u>620,000</u>		<u>620,000</u>	<u>29,380,000</u>	<u>30,000,000</u>

Summary of Work: The replacement library to be constructed will provide a new flexible state of the art facility with multiple study and collaboration areas with lots of natural light that includes furniture for quiet and group study use. The new facility will include a dedicated archives area, computer and research space, snack station and offices for faculty. The roof has been evaluated by the Department of Administration and has been determined to comply with JBRC policy and will come with the minimum 20-year material and workmanship warranty.

Rationale: The library is outdated with multiple deferred maintenance issues and is not ADA compliant. A portion of the library (6,000 square feet) has been offline since 2009 due to water intrusion.

Facility Characteristics: Whittaker Library is 47,739 square feet and was constructed in 1968 (57 years old). The demolition or future use of the existing library is still being studied. The university will engage a civil and structural consultant to facilitate a final decision. The new library to be constructed will be 50,000 square feet. It will be located at the site of the recently demolished Manning and Branham Halls, between the Memorial Plaza and Davis Hall along Gathers Street, on the northwest side of campus. The library will support all students and academic programs across the campus and surrounding community. The facility will be utilized by approximately 4,000 students, faculty and staff.

Financial Impact: This phase of the project will be funded from FY25 Appropriated State (nonrecurring) (uncommitted balance \$24.38 million at September 8, 2025) and FY25 Capital Reserve Funds (uncommitted balance \$5 million at September 8, 2025). The project is expected to result in an increase of \$18,800 (years 1 thru 3), in annual operating expenditures. The new building will be constructed to meet Two Green Globes certification standards with anticipated energy savings of \$1,137,000 over 30 years. No student fees or tuition will be increased as a consequence of the project. While not being utilized to fund this project, a portion of tuition is designated for capital improvements, currently \$752 per student per semester, and has decreased from \$1,123 between academic years 2021-2022 to 2025-2026.

Full Project Estimate: \$30,000,000 funded from Appropriated State (nonrecurring) and Capital Reserve Funds. Contract execution is expected in February 2026 and completion of construction in June 2027.

7. Project: University of South Carolina - Aiken  
 H29.9564: Sciences Building Renovation and Expansion
- Request: Establish Phase I Pre-Design Budget to renovate and expand the Sciences Building.
- Included in CPIP: Yes – 2025 CPIP Priority 1 of 1 of FY26 (estimated at \$8,350,000)
- Supporting Details: Pages 111-118

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY26 Appropriated State, Proviso 118.22 (B)(18), (Science Building Enhancement and Modernization)				125,250	125,250
All Sources				<u>125,250</u>	<u>125,250</u>

Summary of Work: The project will expand the building by adding three additional instructional laboratories and renovate the building to modernize the existing lab spaces. The work includes new hoods, plumbing, mechanical systems, and finishes. The renovations will also provide more efficiently sized offices, allowing faculty to move out of temporary offices. The project will also address capital renewal concerns such as HVAC and elevators. All roofing material options will be evaluated during the Phase I process.

Rationale: The project will respond to enrollment growth and long-standing maintenance needs. Occupational efficiency, enhanced safety and hygiene, updated lab environments reflecting modern learning pedagogies, improved structural issues, and increased programs allowing external collaborative applied research deliverables are among other benefits. The new labs will support environmental work in biology and chemistry and applied research.

Facility Characteristics: The Sciences Building is 36,119 square feet and was constructed in 1989 (36 years old). An approximate 3,000 square feet expansion will be added to the building. The building is utilized by biology, chemistry, and the applied sciences. Approximately 350 students, faculty, staff and clients within the programs will utilize the space.

Financial Impact: The project will be funded from FY26 Appropriated State (nonrecurring) Funds (uncommitted balance \$8.35 million at September 16, 2025). The project is expected to result in a decrease of \$13,200 (years 1 thru 3) in annual operating expenditures. No student fees or tuition will be increased as a consequence of the project. While not being utilized to fund this project, a portion of tuition is designated for capital improvements, currently \$12 per student per semester, and has not increased between academic years 2021-2022 to 2025-2026.

Full Project Estimate: \$8,350,000 (internal) funded from Appropriated State (nonrecurring) Funds. While this project is fully funded from legislatively authorized funds, it is required to follow the Phase I/Phase II submission process per the JBRC roof policy.

8. Project: Winthrop University  
 H47.9631: New Residence Hall
- Request: Establish Phase I Pre-Design Budget to construct a new student residence hall.
- Included in CPIP: Yes – 2025 CPIP Priority 7 of 8 in FY28 (estimated at \$38,000,000)
- Supporting Details: Pages 119-126

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Housing Revenue				600,000	600,000
All Sources				<u>600,000</u>	<u>600,000</u>

Summary of Work: The project will construct a new student 350 to 500 bed residence hall in POD or wet core style. The building will include a kitchen, study/hang out space, laundry rooms, 30 to 40 seat multipurpose meeting room and a resident advisor apartment. All roofing material options will be evaluated during the Phase I process. The building will be designed to meet either LEED Silver or Two Green Globes certification standards.

Rationale: Wofford and Richardson residence halls, which totaled approximately 800 beds, were closed in 2022 and demolished in 2024. The university's increasing enrollment of new and transfer students plus increasing retention of existing students has put an increased demand on the remaining student housing. The project was included in the CPIP as an FY28 item but is being requested at this time because the increasing size of the incoming classes, growth in transfer students plus improved student retention is growing the overall student body. The number of affordable rental housing options in the Rock Hill area is now very limited and forcing students who normally live off campus to want to come back on campus to complete their education. The university has tried to alleviate this pressure by leasing 526 beds from an adjacent apartment over the last 2 years but still have had to implement waiting lists and direct upper-class who want to live on campus to off campus housing. The building will not be finished before late 2027 at the earliest.

Facility Characteristics: The new residence hall to be constructed will be approximately 90,000 to 100,000 square feet. Total undergraduate and graduate student enrollment is just under 5,000, with approximately 1,200 faculty and staff, plus various daily visitors.

Financial Impact: This phase of the project will be funded from Other, Housing Revenue Funds (uncommitted balance \$10.63 million at June 30, 2025). Revenue to this fund is generated from the Housing Fund Net Position, which is reimbursed from bond funds. The project is expected to result in an increase of \$500,000 (years 1 thru 3), in annual operating expenditures, which will be funded by revenue generated from occupancy of the rooms. No student fees or tuition will be increased as a consequence of the project. While not being utilized to fund this project, a portion of tuition is designated for capital improvements, currently \$151 per student per semester, and has decreased from \$543 between academic years 2021-2022 to 2025-2026.

Full Project Estimate: \$40,000,000 (internal). Phase II will be funded from Revenue Bond Funds.

9. Project: Midlands Technical College  
 H59.6370: 3245 Platt Spring Road Building Project - Acquisition
- Request: Establish Preliminary Land Acquisition for the purpose of investigating the acquisition of a building and +/- 6.26 acres in Lexington County.
- Included in CPIP: Yes – 2025 CPIP Priority 4 of 6 in FY27 (estimated at \$5,900,000)
- Supporting Details: Pages 127-140

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, College				45,000	45,000
All Sources				<u>45,000</u>	<u>45,000</u>

- Rationale: The purchase of this building will help alleviate the current waiting list in 6 of the college academic programs. These programs will have more space in the new building. Additionally, relocating these programs to this building will free up space in the existing buildings for other programs to expand.
- Characteristics: Located in the Town of Springdale, the building is 74,532 square feet and was constructed in 1993 (32 years old) and was renovated in 2009 (16 years ago). The roof was replaced in 2019 (6 years ago). The building is located on +/- 4.95 acres, plus an additional +/- 1.31-acre parking lot will also be acquired to provide additional parking for the programs going into the building.
- Financial Impact: The property is offered by Airport Technologies, LLC for the proposed purchase price of \$5,900,000. The due diligence activities will be funded from Other, College Funds (uncommitted balance \$10.15 million at September 3, 2025). The College Funds are generated from county funds and capital fees set aside to support future projects. If acquired, the building will be renovated as a separate project, with a total estimated cost of \$12,000,000. The project is expected to result in an increase of \$1,299,000 (year 1), \$2,727,900 (year 2), and \$2,864,295 (year 3), in annual operating expenditures. No student fees or tuition will be increased as a consequence of the project. While not being utilized to fund this project, a portion of tuition is designated for capital improvements, currently \$75 per student per semester, and has not changed between academic years 2021-2022 to 2025-2026. The full amount of this fee is pledged for debt service.
- Full Project Estimate: \$5,920,000 (internal) funded from Local Funds. The Phase I amount requested includes \$25k for earnest money. Even though the project was included in the 2025 CPIP submission as an FY27 item, establishment is being requested at this time because funding was received for Advance Manufacturing and Skilled Trades Workforce Development, which will be used to construct additional buildings. Purchasing this building at this time will help redirect different programs tied to Advance Manufacturing.

10. Project: Piedmont Technical College  
H59.6333: Library and Student Engagement Center
- Request: Revise Scope and Establish Phase II Full Construction Budget to renovate the library on the Greenwood Campus.
- Included in CPIP: Yes – 2025 CPIP Priority 4 of 4 in FY26 (estimated at \$12,800,000)
- Phase I Approval: February 2025 (estimated at \$7,300,000) (SFAA)
- Supporting Details: Pages 141-158

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY25 Capital Reserve (21)(h) (Maintenance, Renovation, and Replacement)				2,300,000	2,300,000
FY22 Appropriated State, Proviso 118.18 (B)(27)(n), (Maintenance, Renovation and Replacement)	109,500		109,500	2,120,231	2,229,731
FY23 Appropriated State, Proviso 118.19 (B)(27)(j), (Maintenance, Renovation and Replacement)				3,711,966	3,711,966
FY25 Appropriated State, Proviso 118.20 (B)(21)(i)(ii), (Maintenance, Renovation and Replacement)				1,300,000	1,300,000
FY26 Appropriated State, Proviso 118.22 (B)(27)(m), (Maintenance, Renovation and Replacement)				3,253,987	3,253,987
All Sources	<u>109,500</u>		<u>109,500</u>	<u>12,686,184</u>	<u>12,795,684</u>

Summary of Work: The project was established to renovate the upstairs of the existing K Building, which includes the Library and Student Engagement Center. The renovations will create collaboration space, providing areas for focused group and independent study, casual interactions, and private study spaces. Additionally, the renovation will include a workforce engagement and training area, allowing opportunities for students to engage with local industry partners. This scope revision request will expand the renovation by adding renovation of the downstairs, which includes faculty offices and additional student engagement spaces. Mechanical units and related systems will be replaced, and plumbing piping will be upgraded, along with associated electrical work.

Rationale: The original scope consisted of completing the project in stages as part of two separate projects due to funding limitations. The college received additional funding which eliminates the need for the work to be completed in separate projects. Renovating the upstairs will provide collaborative and student spaces that enhance library functionality and better serve student needs. Renovating the downstairs will provide an upgrade to faculty and staff spaces with additional student engagement areas.

Facility Characteristics: The K Building is 42,000 square feet and was constructed in 1991 (34 years old). Approximately 37,900 square feet will be renovated in this project. The building has not undergone any significant renovation since construction. The renovations will serve to

modernize the building and its systems as a whole. The building houses the Library, Student Engagement Center, and faculty offices. It is utilized by 496 full and part-time faculty and staff, and approximately 2,649 students who attend at the Greenwood Campus plus all credit and non-credit students regardless of their primary campus location.

Financial Impact:

This phase of the project will be funded from FY25 Capital Reserve (uncommitted balance \$2.3 million at September 9, 2025), FY22 Appropriated State (nonrecurring) (uncommitted balance \$2.12 million at September 9, 2025), FY23 Appropriated State (nonrecurring) (uncommitted balance \$3.71 million at September 9, 2025), FY25 Appropriated State (nonrecurring) (uncommitted balance \$1.3 million at September 9, 2025), and FY26 Appropriated State (nonrecurring) Funds (uncommitted balance \$7 million at September 9, 2025). The project is expected to result in a decrease of \$15,000 (years 1 thru 3), in annual operating expenditures. The renovations will be constructed to meet Two Green Globes certification standards with anticipated energy savings of \$454,959 over 30 years. No student fees or tuition will be increased as a consequence of the project. While not being utilized to fund this project, a portion of tuition is designated for capital improvements, currently \$150 per student per semester, and has not changed between academic years 2021-2022 to 2025-2026.

Full Project Estimate:

\$12,795,684 funded from Capital Reserve and Appropriated State (nonrecurring) Funds. Contract execution is expected in August 2026 and completion of construction in August 2027.



11. Project: Piedmont Technical College  
 H59.6360: Technical Innovation Center – Land Acquisition
- Request: Establish Final Land Acquisition to acquire +/- 23.45 acres in Greenwood County.
- Included in CPIP: Yes – 2025 CPIP Priority 3 of 4 in FY26 (estimated at \$20,000)
- Phase I Approval: August 2025 (estimated at \$20,000) (JBRC)
- Supporting Details: Pages 159-172

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, College Plant	20,000		20,000		20,000
All Sources	<u>20,000</u>		<u>20,000</u>		<u>20,000</u>

Rationale: The land will be used as the future location of the Technical Innovation Center. This center will allow high school, dual enrollment, and college students access to programs not currently being offered by the existing Career Center which is used by three school districts. This project is part of a new partnership with G. Frank Russell and will allow the college to offer additional programs in Cosmetology, Culinary Arts, Biomedical Sciences, Sports Medicine, PLTW Engineering, and Automotive Collision. The current career center is owned by Greenwood County and is 50+ years old. After construction of the new Career Center, the old Career Center will be taken back over by Greenwood County.

Characteristics: The property is located on Emerald Road South in Greenwood and is undeveloped.

Financial Impact: The property is offered by Piedmont Technical College Foundation – Greenwood Properties, LLC as a donation. The foundation acquired the property in 2016 as a donation. If acquired, a Technical Innovation Center will be constructed as a separate project, with a total estimated cost of \$29,488,217. The land acquisition is not expected to result in any change in annual operating expenditures. No student fees or tuition will be increased as a consequence of the acquisition. While not being utilized to fund this project, a portion of tuition is designated for capital improvements, currently \$150 per student per semester, and has not changed between academic years 2021-2022 to 2025-2026. An appraisal is not required because this acquisition is a donation. A Phase I Environmental Site Assessment was completed in September 2025 and found no evidence of recognized environmental conditions in connection with the property. A Building Condition Assessment is not required because there are no buildings located on the property. Letters of support are not required because the property is owned by a non-profit entity.

Full Project Estimate: \$20,000 funded from College Plant Funds.

12. Project: Spartanburg Community College  
 H59.6372: Union Campus Building Acquisition
- Request: Establish Preliminary Land Acquisition for the purpose of investigating the acquisition of a building and +/- 21.39 acres in Union County.
- Included in CPIP: Yes – 2025 CPIP Priority 4 of 11 in FY26 (estimated at \$20,000)
- Supporting Details: Pages 173-184

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, College Plant				20,000	20,000
All Sources				<u>20,000</u>	<u>20,000</u>

Rationale: When first constructed, the Union County Advanced Technology Center was one of the five Quick Jobs Centers in the state. The building was originally operated in partnership with USC Union beginning in 2009, but Spartanburg Community College eventually became the sole tenant. Union County provides tax dollars towards the operation of the facility by the college and the college supplements any shortfall with their own funds. Currently Union County is responsible for any capital improvements to the facility. A motion is in place with Union County Council to transfer the land and building to the college at no cost.

Characteristics: The center is approximately 14,000 square feet and sits on +/- 21.39 acres. It is a collaborative partnership with the City and County of Union.

Financial Impact: The property is offered by Union County as a donation. The due diligence activities will be funded from Other, College Plant Funds (uncommitted balance \$12.33 million at August 21, 2025). College Plant Funds are derived from a portion of the budget allocated towards capital projects, plus a year-end transfer of excess revenues over expenditures. The project is not expected to result in any change in annual operating expenditures, however, upon acquisition SCC will become responsible for any future capital improvements. No student fees or tuition will be increased as a consequence of the project. Currently, there is no portion of tuition designated for capital improvements.

Full Project Estimate: \$20,000 (internal) funded from College Plant Funds.

13. Project: Tri-County Technical College  
 H59.6368: HVAC Program Relocation - WTC
- Request: Establish Phase I Pre-Design Budget to expand the Workforce Training Center at the Pendleton Campus.
- Included in CPIP: Yes – 2025 CPIP Priority 2 of 2 in FY26 (estimated at \$3,500,000)
- Supporting Details: Pages 185-192

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Accumulated Maintenance Reserve				52,500	52,500
All Sources				<u>52,500</u>	<u>52,500</u>

Summary of Work: The project will add an additional 6,000 square feet to the building to house the HVAC program. The addition will include classrooms, faculty offices, labs, conference rooms, and student engagement spaces. All roofing material options will be evaluated during the Phase I process.

Rationale: The HVAC program is currently located in Cleveland Hall on the Pendleton campus. The current space no longer accommodates the program due to enrollment growth. Cleveland Hall houses the College's Engineering and Industrial Technology division (EIT). This academic building is at maximum capacity with EIT labs and classes conducted in several different buildings across campus. The vacated space will be used by the EIT division to move some existing classes into Cleveland and allow for future academic programming growth.

Facility Characteristics: The Workforce Training Center is 8,500 square feet and was constructed in 2019 (7 years old). Approximately 95 students, faculty and staff utilize the building.

Financial Impact: This phase of the project will be funded from Other, Accumulated Maintenance Reserve Funds (uncommitted balance \$59.64 million at June 30, 2025). The project is expected to result in an increase of \$28,500 (years 1 thru 3) in annual operating expenditures. No student fees or tuition will be increased as a consequence of the project. Currently, no portion of tuition is designated for capital improvements.

Full Project Estimate: \$3,500,000 (internal). Phase II will be funded from Accumulated Maintenance Reserve and ReadySC Funds.

14. Project: Tri-County Technical College  
H59.6311: Anderson Campus Transportation, Logistics & Utility Center
- Request: Revise Scope and Establish Phase II Full Construction Budget to construct four new buildings and expand another.
- Included in CPIP: Yes – 2025 CPIP Priority 1 of 2 in FY26 (estimated at \$31,000,000)
- Phase I Approval: June 2024 (estimated at \$31,000,000) (SFAA)
- Supporting Details: Pages 193-216

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY23 Appropriated State, Proviso 118.19 (B)(27)(w), (Transportation, Logistics, & Utility Center)	465,000		465,000	5,535,000	6,000,000
FY26 Appropriated State, Proviso 118.22 (B)(27)(p)(iii), (Diesel Mechanic Training Facility)				2,500,000	2,500,000
Other, Accumulated Maintenance				22,500,000	22,500,000
All Sources	<u>465,000</u>		<u>465,000</u>	<u>30,535,000</u>	<u>31,000,000</u>

Summary of Work: The project was established to expand an academic building and construct a mechatronics building, automotive/diesel program building, and heavy equipment/power lineman building. Additionally, expansion of the truck driver training pad was included to accommodate a third section of classes. This scope revision request will add construction of a commercial driver's license (CDL) instructional facility. All structures will be fully accessible with energy efficient systems. The roofs have been evaluated by the Department of Administration and have been determined to comply with JBRC policy and will come with the minimum 20-year material and workmanship warranty.

Rationale: The need for the additional facilities is based on third party economic scans whose data supported the need for each of these services and programs in the Anderson area.

Facility Characteristics: The existing Center for Career and Education academic building is 6,000 square feet and was constructed in 2013 (12 years old). It will be expanded by 1,000 square feet. The Mechatronics building to be constructed will be located adjacent to the main facility and will be 12,800 square feet. The Automotive/Diesel program building to be constructed will be located on the northeast quadrant of campus and will be 24,700 square feet. The Heavy Equipment/Power Lineman Building to be constructed will be located on the west side of campus and will be 11,300 square feet. The CDL Truck Facility to be constructed will be located on the west side of campus and will be 3,600 square feet. The new buildings and expanded academic building will house the Mechatronics Program, Automotive/Diesel Program, and CDL/Heavy Equipment & Power Lineman Programs. The facilities will be utilized by approximately 1,000 students, faculty, staff, and clients.

Financial Impact: This phase of the project will be funded from FY23 Appropriated State (nonrecurring) (uncommitted balance \$5.53 million at September 10, 2025), FY26 Appropriated State (nonrecurring) (uncommitted balance \$2.5 million at September 10, 2025), and Other, Accumulated Maintenance Reserve Funds (uncommitted balance \$59.64 million at June 1,

2025). The project is expected to result in an increase of \$181,115 (years 1 thru 3), in annual operating expenditures. The Mechatronics Lab Building will be construction to meet Two Green Globes certification standards with anticipated energy savings of \$100,583 over 30 years. The Automotive Diesel Building will be constructed to meet Two Green Globes certification standards with anticipated energy savings of \$189,187 over 30 years. The Heavy Equipment/Power Lineman Building will not be constructed to meet LEED Silver or Two Green Globes certification standards because the building will have less than 10,000 square feet of conditioned space. No student fees or tuition will be increased as a consequence of the project. Currently, no portion of tuition is designated for capital improvements.

Full Project Estimate: \$31,000,000 funded from Appropriated State (nonrecurring) and Accumulated Maintenance Reserve Funds. Contract execution is expected in October 2026 and completion of construction in December 2027.

15. Project: Trident Technical College  
 H59.6367: Thornley Campus Building 630 Renovations
- Request: Establish Phase I Pre-Design Budget to renovate the Health Sciences building.
- Included in CPIP: Yes – 2025 CPIP Priority 4 of 4 in FY26 (estimated at \$6,200,000)
- Supporting Details: Pages 217-226

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY25 Capital Reserve, (21)(l), (Maintenance, Renovation, and Replacement)				41,975	41,975
FY25 Appropriated State, Proviso 118.20 (B)(21)(m), (Maintenance, Renovation, and Replacement)				48,025	48,025
All Sources				<u>90,000</u>	<u>90,000</u>

Summary of Work: The project will replace the mechanical system and update interior finishes throughout the building. The work will include new water source heat pumps, furring out block walls with sheetrock, painting, new ceiling grid tiles, new acoustic panels and LED lighting.

Rationale: The water source heat pumps break down frequently and parts are difficult to find. The existing finishes are outdated.

Facility Characteristics: Building 630 is 55,400 square feet and was constructed in 1989 (36 years old). Most of the existing mechanical and interior finishes are original to the building. Approximately 47,400 square feet of the interior will be renovated. The mechanical systems serve the entire building. Building 630 houses Health Sciences and related programs. Approximately 1,502 students and 34 faculty and staff utilize the building annually.

Financial Impact: This phase of the project will be funded from FY25 Capital Reserve (uncommitted balance \$4.5 million at September 5, 2025), and FY25 Appropriated State (nonrecurring) Funds (uncommitted balance \$2.66 million at September 5, 2025, which will be used in its entirety in H59-6367 and H59-6224). The project is expected to result in a decrease of \$95,000 (year 1), \$99,750 (year 2), and \$104,750 (year 3) in annual operating expenditures. No student fees or tuition will be increased as a consequence of the project. While not being utilized to fund this project, a portion of tuition is designated for capital improvements, currently \$208 per student per semester, and has increased from \$196 between academic year 2021-2022 to 2025-2026.

Full Project Estimate: \$6,200,000 (internal). Phase II will be funded from Capital Reserve, Appropriated State (nonrecurring), and Local Funds.

16. Project: Trident Technical College  
H59.6224: Berkeley Campus Renovation - Transportation and Logistics Center
- Request: Increase Phase II Full Construction Budget to cover increased costs to re-purpose the main building into a high-tech training facility.
- Included in CPIP: Yes – 2025 CPIP Priority 1 of 4 in FY26 (estimated at \$46,633,144)
- Phase I Approval: November 2022 (estimated at \$34,133,144) (SFAA)
- Phase II Approval: March 2024 (estimated at \$37,533,144) (SFAA)
- Supporting Details: Pages 227-254

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY22 Capital Reserve (24), (Maintenance, Renovation, and Replacement)		1,400,000	1,400,000		1,400,000
FY24 Capital Reserve (18)(n), (Maintenance, Renovation, and Replacement)				300,000	300,000
FY23 Appropriated State, Proviso 118.19 (B)(27)(n)(i), (Maintenance, Renovation, and Replacement)				187,112	187,112
FY25 Appropriated State, Proviso 118.20 (B)(21)(m), (Maintenance, Renovation, and Replacement)				2,612,888	2,612,888
FY22 Appropriated State, Proviso 118.19 (B)(27)(u), (Maintenance, Renovation, and Replacement)		16,306,515	16,306,515		16,306,515
FY22 Appropriated State, Proviso 118.18 (B)(27)(v), (Lowcountry Transportation and Logistics Center)	511,997	4,488,003	5,000,000		5,000,000
FY23 Appropriated State, Proviso 118.19 (B)(27)(x), (Berkeley Campus)		6,000,000	6,000,000		6,000,000
Other, Local		8,826,629	8,826,629		8,826,629
All Sources	<u>511,997</u>	<u>37,021,147</u>	<u>37,533,144</u>	<u>3,100,000</u>	<u>40,633,144</u>

Summary of Work: The project will renovate the entire 74,083 square foot building and add approximately 11,579 square foot of additional flex space. The renovations include an interior upfit for classroom and campus functions, new roof, mechanical, electrical, plumbing systems, and addition of a new fire protection system. Classroom and campus functions include general educational classrooms, a chemistry lab, high-bay vocational training classrooms, student commons, meeting and collaboration rooms, kitchen prep area, group restrooms, office and staff areas. New construction is limited to a new high-bay area for the Diesel Mechanics Program and a new flexible classroom and training space. The roof has been evaluated by the Department of Administration and has been determined to comply with JBRC policy and will come with the minimum 20-year material and workmanship warranty.

Rationale: This increase will cover unsuitable soil conditions, additional unforeseen asbestos abatement, additional land disturbance requirements, cost escalation, and a required second truck driving pad. This economic development project addresses the challenge of providing transportation,



distribution and logistics (supply chain) services to the region by accommodating the workforce needs of diverse employment sectors, per the college. This project will re-purpose the main building to serve the transportation and supply chain needs of existing and new industries within the logistics sector including transportation and air freight providers as well as warehouse and distribution centers. Additional high-bay training spaces and labs are required to help meet new industry demands and the growing manufacturing plants located nearby.

**Facility Characteristics:** The 74,083 square foot building was constructed in 1982 (43 years old). The existing roof was replaced in 2007 (18 years old) and was recommended for replacement as a large portion of the existing roof had to be demolished to construct the new flexible training space, the ceiling height had to be increased for one of the truck bays, and the new roof top HVAC units required new roof curbs, curb sizes and penetrations. Some components of the HVAC equipment have been replaced over the years, but much of the current equipment is over 20 years old. Restrooms were renovated 9 years ago. The remaining components, including electrical and plumbing are original to the building. The building is utilized by 3,000+ students, 35 faculty and staff, and hundreds of clients annually.

**Financial Impact:** This increase will be funded from FY24 Capital Reserve (uncommitted balance \$300k at September 9, 2025), FY23 Appropriated State (nonrecurring) (uncommitted balance \$4.42 million at September 9, 2025), and FY25 Appropriated State (nonrecurring) Funds (uncommitted balance \$2.66 million at September 9, 2025, which will be used in its entirety in H59-6224 and H59-6367). The project is expected to result in an increase of \$26,897 (year 1), \$27,704 (year 2), and \$28,535 (year 3) in annual operating expenditures. No student fees or tuition will be increased as a consequence of the project. While not being utilized to fund this project, a portion of tuition is designated for capital improvements, currently \$208 per student per semester, and increased from \$196 between academic year 2021-2022 to 2025-2026. The renovations will be constructed to meet Two Green Globe certification standards with anticipated energy savings of \$1,309,929 over 30 years.

**Full Project Estimate:** \$40,633,144 funded from Capital Reserve, Appropriated State (nonrecurring), and College Funds. Completion of construction is expected in December 2026.

17. Project: York Technical College  
H59.6369: Electric Vehicle (EV) & Auto Body Repair Renovation - Building G
- Request: Establish Phase II Full Construction Budget to renovate Building G.
- Included in CPIP: Yes – 2025 CPIP Priority 2 of 3 in FY26 (estimated at \$4,500,000)
- Supporting Details: Pages 255-264

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY24 Capital Reserve (18)(p), (Maintenance, Renovation, and Replacement)				2,919,376	2,919,376
FY25 Appropriated State, Proviso 118.20 (B)(21)(o)(ii), (Maintenance, Renovation, and Replacement)				2,080,624	2,080,624
All Sources				<u>5,000,000</u>	<u>5,000,000</u>

Summary of Work: The project will renovate the building to meet workforce demands for skilled electric vehicle (EV) and auto body repair technicians. The work will include mechanical, electrical, plumbing, and the addition of a corridor.

Rationale: The current space cannot support the programs and is inefficiently arranged for equipment upgrades and program growth. The renovation is necessary to accommodate more students and enhance faculty oversight without relocating the program, minimizing disruptions.

Facility Characteristics: Building G is 11,565 square feet and was constructed in 1983 (42 years old). The renovation will include approximately 862 square feet of new space to add a new corridor. The building houses the EV and Auto Body Repair programs. Approximately 200 students and 7 faculty/staff are expected to use the facility throughout the year.

Financial Impact: The project will be funded from FY24 Capital Reserve (uncommitted balance \$2.91 million at September 11, 2025) and FY25 Appropriated State (nonrecurring) Funds (uncommitted balance \$2.08 million at September 11, 2025). The project is expected to result in an increase of \$3,544 (years 1 thru 3) in annual operating expenditures. No student fees or tuition will be increased as a consequence of the project. Currently, there is no portion of tuition designated for capital improvements.

Full Project Estimate: \$5,000,000 funded from Capital Reserve and Appropriated State (nonrecurring) Funds. This project is being requested for establishment at Phase II because it is fully funded from legislatively authorized funds. Contract execution is expected in January 2027 and completion of construction in March 2028. The estimated cost to complete the project has increased from the 2025 CPIP submission because the final estimate for the project was determined after the 2025 CPIP process.

18. Project: York Technical College  
H59.6371: New Building Construction Trades Facility
- Request: Establish Phase I Pre-Design Budget to construct a new Building Construction Trades Facility.
- Included in CPIP: Yes – 2025 CPIP Priority 3 of 3 in FY26 (estimated at \$12,000,000)
- Supporting Details: Pages 265-272

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY26 Appropriated State, Proviso 118.22 (B)(27)(s)(ii), (Trades Program Expansion)				300,000	300,000
All Sources				<u>300,000</u>	<u>300,000</u>

Summary of Work: The project will construct a new classroom and laboratory space for the Building Construction Trades (BCT) program. The new building will be designed to meet either LEED Silver or Two Green Globes certification standards. All roofing material options will be evaluated during the Phase I process and will conform to JBRC policy.

Rationale: Currently, the College leases the existing BCT facility in Rock Hill for \$19,920.36 annually. The facility is approximately 5 miles from the main campus, which limits program growth and integration with other technical programs. The existing BCT site is inadequate and does not meet the current expansion needs of the program. It restricts the interior /exterior area needed to teach the program and construct model homes. The new facility will provide the space and infrastructure needed to support the expanding BCT program, accommodate future growth, and combine the HVAC program with construction trades, creating a more efficient and modern learning environment for students preparing to enter high-demand skilled trades.

Facility Characteristics: The new Building Construction Trades Facility will be 27,300 square feet. It will be utilized by the building construction trades programs to support workforce needs for skilled building trades like Framing, HVAC, Plumbing, and Electrical. Approximately 200 students and 7 faculty/staff are expected to use the facility throughout the year.

Financial Impact: The project will be funded from FY26 Appropriated State (nonrecurring) Funds (uncommitted balance \$12 million at September 11, 2025). The project is expected to result in an increase of \$150,082 (years 1 thru 3), in annual operating expenditures. No student fees or tuition will be increased as a consequence of the project. Currently, there is no portion of tuition designated for capital improvements.

Full Project Estimate: \$12,000,000 funded from Appropriated State (nonrecurring) Funds. The Phase I amount requested is 2.5% of the estimated cost to complete the project and the additional amount will be used to cover the Construction Management at Risk procurement method. While this project is fully funded from legislatively authorized funds, it is required to follow the Phase I/Phase II submission process per the JBRC roof policy.

19. Project: South Carolina Law Enforcement Division  
 D10.9537: Aviation Hangar Property Acquisition
- Request: Establish Final Land Acquisition to acquire +/- 25 acres in Richland County.
- Included in CPIP: Yes – 2025 CPIP Priority 3 of 6 in FY26 (estimated at \$20,000)
- Phase I Approval: August 2025 (estimated at \$20,000) (JBRC)
- Supporting Details: Pages 273-284

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Record Search Fees	20,000		20,000	20,000	40,000
All Sources	<u>20,000</u>		<u>20,000</u>	<u>20,000</u>	<u>40,000</u>

Rationale: SLED is no longer able to store its aircraft in its current hangar facility. The latest aircraft acquisition is stored off-site at the Columbia airport. The hazards surrounding the current hangar pose an ongoing risk to arriving and departing aircraft.

Characteristics: The vacant property is located within the vicinity of SLED and is a large and open site free of surrounding hazards.

Financial Impact: The property is being offered by the SC Department of Corrections for \$1. The due diligence activities will be funded from Other, Record Search Fees Funds (uncommitted balance \$16.9 million at October 2, 2025). Approximately \$19k of the current approved budget was utilized on a site study. The additional funds requested will be utilized for additional site borings, legal and other possible services, and potential easements and routes for utilities. Record Search Fee Funds are derived from background check fees charged to the public. If acquired, a new aviation hangar facility will be constructed with an estimated cost of \$8,000,000 to \$10,000,000. The project is expected to result in an increase of \$62,314 (years 1 thru 3), in annual operating expenditures. An appraisal is not required because this is a donation. A Phase I Environmental Site Assessment was completed in September and found no evidence of recognized environmental conditions in connection with the property. A Building Condition Assessment is not required because there are no buildings located on the property. Letters of support are not required because the property is owned by a government entity.

Full Project Estimate: \$40,000 funded from Record Search Fee Funds.

20. Project: Department of Administration  
 D50.6195: Calhoun Building - Flooring Repair and Replacement Floors 3-5

Request: Establish Phase I Pre-Design Budget to replace and update floor finishes.

Included in CPIP: Yes – 2025 CPIP Priority 14 of 32 in FY26 (estimated at \$435,030)

Supporting Details: Pages 285-290

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Appropriated State				16,525	16,525
All Sources				<u>16,525</u>	<u>16,525</u>

Summary of Work: The project will replace and update the existing floor finishes on the third, fourth, and fifth floors of the Calhoun Building. The work will include replacement of the existing floor coverings and abatement of hazardous materials, as needed.

Rationale: The existing floors are in poor condition and are a trip hazard to staff and visitors.

Facility Characteristics: The Calhoun Building is approximately 96,672 square feet and was constructed in 1926 (99 years old). The third, fourth, and fifth floors total 38,213 square feet. The existing floor finishes were installed during a renovation in 2011 (14 years old). The building is utilized by approximately 190 South Carolina Judicial Branch personnel and various visitors annually.

Financial Impact: The project will be funded from FY26 Appropriated State Funds (uncommitted balance \$9.91 million at September 4, 2025). The project is not expected to result in any change in annual operating expenditures.

Full Project Estimate: \$435,000 (internal) funded from Appropriated State Funds. The Phase I amount requested is 3.79% of the estimated cost to complete the project and the additional amount will be used to cover hazardous materials testing.

21. Project: Department of Administration  
 D50.6196: Columbia Mills Building - Generator Replacement

Request: Establish Phase I Pre-Design Budget to replace the generator.

Included in CPIP: Yes – 2025 CPIP Priority 31 of 32 of FY26 (estimated at \$363,000)

Supporting Details: Pages 291-296

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Depreciation Reserve				9,000	9,000
All Sources				<u>9,000</u>	<u>9,000</u>

Summary of Work: The project will replace the emergency generator in the Columbia Mills Building.

Rationale: The generator has exceeded its life expectancy, continues to have operational issues, and maintenance parts are difficult to source.

Facility Characteristics: The Columbia Mills Building is approximately 445,494 square feet and was constructed in 1893 (132 years old). The generator was installed 1986 (39 years old) and provides power to life safety systems and the elevators at the facility. The Columbia Mills Building houses the State Museum, SC Confederate Relic Room & Military Museum, and the Department of Administration. It is utilized by approximately 235,000 employees and visitors on a yearly basis.

Financial Impact: The project will be funded from Other, Depreciation Reserve Funds (uncommitted balance \$1.95 million at September 4, 2025). Depreciation Reserve Funds are derived from the rent account, which receives rent charged to agencies. The project is not expected to result in any change in annual operating expenditures.

Full Project Estimate: \$363,000 (internal) funded from Depreciation Reserve Funds. The Phase I amount requested is 2.47% of the estimated cost to complete the project and the additional amount will be used to cover hazardous materials testing.

22. Project: Department of Administration  
 D50.6198: Mills/Jarrett Building - Parking Lot Improvements

Request: Establish Phase I Pre-Design Budget to repair and replace pavement.

Included in CPIP: Yes – 2025 CPIP Priority 32 of 32 of FY26 (estimated at \$497,000)

Supporting Details: Pages 297-302

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Depreciation Reserve				33,000	33,000
All Sources				<u>33,000</u>	<u>33,000</u>

Summary of Work: The project will repair and replace the pavement of the parking lot at the Mills/Jarrett Building.

Rationale: The asphalt has exceeded its life expectancy, is in poor condition, and is a trip hazard to visitors and employees that utilize the building daily.

Facility Characteristics: The Mills/Jarrett Building is approximately 103,781 square feet. The Mills Building was constructed in 1825 (200 years old). The Jarrett Building was constructed in 1987 (38 years old). The parking lot is original to the building. The Mills/Jarrett Building is going to be utilized by the South Carolina Office of Resilience starting December 2025. Approximately 80 staff plus varying numbers of employees and visitors will utilize the building.

Financial Impact: The project will be funded from Other, Depreciation Reserve Funds (uncommitted balance \$1.95 million at September 4, 2025). Depreciation Reserve Funds are derived from the rent account, which receives rent charged to agencies. The project is not expected to result in any change in annual operating expenditures.

Full Project Estimate: \$500,000 (internal) funded from Depreciation Reserve Funds. The Phase I amount requested is 6.60% of the estimated cost to complete the project and the additional amount will be used to cover geotechnical services.

23. Project: Department of Administration  
 D50.6199: Wade Hampton Building - Window Replacement

Request: Establish Phase I Pre-Design Budget to replace or refurbish windows.

Included in CPIP: Yes – 2025 CPIP Priority 13 of 32 of FY26 (estimated at \$4,900,000)

Supporting Details: Pages 303-308

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Appropriated State				93,500	93,500
All Sources				<u>93,500</u>	<u>93,500</u>

Summary of Work: The project will replace or refurbish the windows in the building. The building is a National Register Property, which will require special attention to detail and preservation methods as well as coordination and review with state authorities. Replacement or refurbishment of the windows will be evaluated during Phase 1 Pre-Design in conjunction with the State Historic Preservation Office.

Rationale: The existing windows are past their useful life and leaking in multiple areas.

Facility Characteristics: The Wade Hampton Building is approximately 121,141 square feet and was constructed in 1938 (87 years old). The windows are original to the building. The building houses the following Agencies: SC Department of Administration, SC Commission on Prosecution, Bureau of Protective Services, SC Commission for the Blind, Governor's Office, SC State Treasurer's Office, SC Comptroller General Office, SC Adjutant General's Office, SC Department of Agriculture, and State Fiscal Accountability Authority. It is utilized by approximately 275 staff and various annual visitors.

Financial Impact: The project will be funded from FY26 Appropriated State Funds (uncommitted balance \$9.91 million at September 4, 2025). The project is expected to result in a decrease in annual operating expenditures, but that amount has not yet been determined.

Full Project Estimate: \$4,900,000 (internal) funded from Appropriated State Funds. The Phase I amount requested is 1.90% of the estimated cost to complete the project and the additional amount will be used to cover hazardous materials testing.



24. Project: Department of Administration  
 D50.6197: Columbia Mills Building – SCSM Security Access Control Improvements

Request: Establish Phase II Full Construction Budget to install security access control points.

Included in CPIP: Yes – 2025 SCSM CPIP Priority 3 of 3 of FY26 (estimated at \$400,000)

Supporting Details: Pages 309-318

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, SC State Museum FY22 Appropriated State, Proviso 118.16 (B)(7)(a), (Permanent Gallery Renovation Phase II)				100,000	100,000
Other, SC State Museum FY24 Appropriated State, Proviso 118.19 (B)(24)(c), (Security System Access Control Upgrades)				550,000	550,000
All Sources				<u>650,000</u>	<u>650,000</u>

Summary of Work: The project includes the installation of security access control equipment, associated electrical work, and hazardous material abatement, as needed.

Rationale: The project will secure back-stage staff restricted areas of the museum.

Facility Characteristics: The Columbia Mills Building is approximately 445,494 square feet and was constructed in 1893 (132 years old). The Columbia Mills Building houses the State Museum, SC Confederate Relic Room & Military Museum, and the Department of Administration. It is utilized by approximately 235,000 employees and visitors on a yearly basis.

Financial Impact: Th project will be funded from Other, SC State Museum FY22 Appropriated State (nonrecurring) (uncommitted balance \$3.75 million at October 30, 2025), and Other, SC State Museum FY24 Appropriated State (nonrecurring) Funds (uncommitted balance \$550k at October 30, 2025). The project is not expected to result in any change in annual operating expenditures.

Full Project Estimate: \$650,000 (internal) funded from Appropriated State (nonrecurring) Funds. This project is being requested for establishment at Phase II because it is fully funded from legislatively authorized funds. Contract execution is expected in June 2026 and completion of construction in June 2027.

25. Project: Department of Administration  
 D50.6200: Dennis Building - Emergency Generator Replacement
- Request: Establish Phase II Full Construction Budget to replace the emergency generator.
- Included in CPIP: No – The project originally did not qualify as a PIP based on probable cost.
- Supporting Details: Pages 319-326

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Depreciation Reserve				329,616	329,616
All Sources				<u>329,616</u>	<u>329,616</u>

- Summary of Work: The project will replace the emergency generator and associated electrical wiring.
- Rationale: The generator has exceeded its life expectancy, is non-operational, and parts cannot be sourced. A rental generator is being utilized until a new generator can be installed.
- Facility Characteristics: The Dennis Building is 247,543 square feet and was constructed in 1950 (752 years old). The emergency generator was installed in 1981. The Dennis Building houses the following entities: 1. Attorney General, 2. Commission for the Bind, 3. Department of Revenue and Fiscal Affairs, and 4. Legislative Council. It is utilized by approximately 750 staff and various visitors on a yearly basis.
- Financial Impact: The project will be funded from Other, Depreciation Reserve Funds (uncommitted balance \$1.95 million at September 4, 2025). Depreciation Reserve Funds are derived from the rent account, which receives rent charged to agencies. The project is not expected to result in any change in annual operating expenditures.
- Full Project Estimate: \$329,616 funded from Depreciation Reserve Funds. Contract execution is expected in December 2025 and completion of construction in June 2026. The project is being requested for establishment at Phase II because the project was originally anticipated to be less than \$250k and the Phase I pre-design has been completed, reviewed and approved by the Office of State Engineer and bid. The bids came in over the opinion of probable cost.

26. Project:	Department of Administration D50.6159: SC Data Center – Chiller #1 Replacement
Request:	Increase Phase II Full Construction Budget to cover increased cost to replace a chiller.
Included in CPIP:	No – The need to increase the project budget was unknown during the 2025 CPIP submission process.
Phase I Approval:	October 2024 (estimated at \$400,000) (SFAA)
Phase II Approval:	June 2025 (estimated at \$953,563) (SFAA)
Supporting Details:	Pages 327-332

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Appropriated State	8,000	945,563	953,563		953,563
Appropriated State, (transferred from D50-6081)				54,520	54,520
All Sources	<u>8,000</u>	<u>945,563</u>	<u>953,563</u>	<u>54,520</u>	<u>1,008,083</u>

Summary of Work:	The project will replace Chiller #1. The work will include demolition, pipe, valves, and fittings, as well as, insulation, electrical, and controls.
Rationale:	The additional funds will be utilized to increase the size of the chiller from 170-ton unit to a 200-ton unit. The facility's cooling demand has increased because of the computer room IT systems. The chiller is past its useful life, and replacement parts are difficult to source. The chiller services the office areas of the facility, and its failure will impact operations at the Data Center.
Facility Characteristics:	The SC Data Center is approximately 76,021 square feet and was constructed in 1999 (26 years old). This chiller is original to the building. The building is utilized by approximately 205 SC Division of Technology (DTO) staff plus varying numbers of customers and visitors daily.
Financial Impact:	The increase will be funded from FY22 Appropriated State Funds (uncommitted balance \$54k at September 5, 2025). The project is expected to result in a decrease of \$2,996 (years 1 thru 3), in annual operating expenditures.
Full Project Estimate:	\$1,008,083 funded from Appropriated State Funds. Contract execution is expected in December 2025 and completion of construction in June 2027. The estimated cost to complete the project has increased from the 2024 CPIP and the Phase I estimate due to current market conditions and rising construction costs.

27. Project: Office of the Adjutant General  
 E24.9851: McEntire Joint National Guard Base Land Purchase - Coalie Martin Tract Purchase
- Request: Increase Preliminary Land Acquisition to obtain an updated appraisal for the purpose of investigating the purchase of approximately +/- 43.8 acres of land in Richland County.
- Included in CPIP: Yes – 2025 CPIP Priority 17 of 23 in FY26 (estimated at \$951,450)
- Phase I Approval: November 2023 (estimated at \$175,450) (JBRC Staff)
- Supporting Details: Pages 333-342

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY20 Appropriated State, Proviso 118.16 (B)(18)(c), (McEntire Joint National Guard Base – Land Management)	15,450		15,450	6,000	21,450
All Sources	<u>15,450</u>		<u>15,450</u>	<u>6,000</u>	<u>21,450</u>

- Rationale: This increase will cover the cost to re-administer an appraisal of the property. The original appraisal completed in 2024 was low in relation to the sellers asking price, thus preventing successful negotiations. A recent appraisal completed on the McEntire Joint National Guard Base - Land Management project (E24-9820), provided a higher value on properties surrounding McEntire which is more in line with the sellers asking price. If acquired, the property will establish a complete “south-end clear zone” of runway at the base. Runway clear zones are 3,000 feet by 3,000 feet ground areas required at both ends of the runway. Clear zones are required for the runway and should be either owned or protected under a long-term lease as stated in UFC3-260-01. These areas possess a high potential for accidents, and their use is restricted to be compatible with aircraft operations. The 169FW does not currently own or have restrictive easements for all of the land for the southern clear zone.
- Characteristics: The property to be purchased is +/- 43.8 acres of land located at 1000 Gus Lane in Hopkins. This parcel is privately owned but surrounded by government owned lands. Access to these parcels is by a public road ending at the government’s boundary, then by private road running through government lands within feet of the installation’s security fence. The existing structure located on the tract will be demolished and debris hauled off-site for disposal.
- Financial Impact: The property is offered by Martin Colie Blease, III for the proposed purchase price of \$930,000. The due diligence activities will be funded from FY20 Appropriated State (nonrecurring) Funds (uncommitted balance \$2.09 million at September 2, 2025). The project is not expected to result in any change in annual operating expenditures.
- Full Project Estimate: \$951,450 (internal) funded from Appropriated State (nonrecurring) Funds.

28. Project: Department of Veterans Affairs  
E26.9906: Veterans Victory House Walk-in Refrigerator Freezer

Request: Establish Phase II Full Construction Budget to replace the walk-in refrigerator & freezer system.

Included in CPIP: Yes - 2025 CPIP Priority 5 of 6 in FY26 (estimated at \$400,000)

Supporting Details: Pages 343-350

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY25 Capital Reserve (35)(a), (Veteran Homes – Capital Improvements)				400,000	400,000
All Sources				<u>400,000</u>	<u>400,000</u>

Summary of Work: The project will replace the walk-in refrigerator & freezer refrigeration system. The current system has 3 compressors installed in the single condensing unit, with each compressor serving a walk-in unit. For maintenance and repairs the system must be powered off jeopardizing safe operation of food storage and prep. The new system will include reworking the mechanical yard to accommodate three separate standalone condensing units.

Rationale: The current refrigeration system for the walk-in units is past its expected useful life. The condensing units and evaporator coils have become expensive to maintain and replacement parts for the equipment harder to obtain. For maintenance and repairs the system must be powered off jeopardizing safe operation of food storage and preparation.

Facility Characteristics: The Veterans Victory House is 124,800 square feet and was constructed in 2006 (19 years old). The kitchen is 3,500 square feet. The existing walk-in refrigerator and freezer is original to the building. Veterans Victory House is a State Veterans Nursing Home that houses 220 Veterans along with 225 staff and support personnel.

Financial Impact: The project will be funded from FY25 Capital Reserve (uncommitted balance \$18.21 million at September 30, 2025). The project is expected to result in a decrease of \$1,500 (year 1), and \$3,000 (years 2 thru 3), in annual operating expenditures.

Full Project Estimate: \$400,000 (internal) funded from Capital Reserve Funds. This project is being requested for establishment at Phase II because it is fully funded from legislatively authorized funds. Contract execution is expected in July 2026 and completion of construction in November 2026.

29. Project: Department of Veterans Affairs  
E26.9900: Campbell Fan Coil Unit Replacement
- Request: Establish Phase II Full Construction Budget to replace chilled water fan coils throughout the nursing home.
- Included in CPIP: Yes - 2025 CPIP Priority 4 of 6 in FY26 (estimated at \$5,500,000)
- Phase I Approval: October 2024 (estimated at \$900,000) (SFAA)
- Supporting Details: Pages 351-360

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY25 Appropriated State, Proviso 118.20 (B)(61)(c), (Veteran Homes – Capital Improvements)	13,500		13,500		13,500
FY25 Capital Reserve (35)(a), (Veteran Homes – Capital Improvements)				5,481,890	5,481,890
All Sources	<u>13,500</u>		<u>13,500</u>	<u>5,481,890</u>	<u>5,495,390</u>

Summary of Work: The project will replace the chilled water fan coils throughout the Campbell VA State Nursing Home.

Rationale: The fan coils are past their expected useful life and are beyond basic maintenance repairs. Replacing the failing fan coil units will increase the cooling efficiency and capability of the HVAC system, decrease the overall utility cost during the summer months, and reduce the amount of maintenance currently required to repair the aging units.

Facility Characteristics: The Campbell Veterans Nursing Home is 92,210 square feet and was constructed in 1991 (34 years old). The fan coils are original to the building. The nursing home has 220 VA long-term nursing residents and 250 staff/support personnel.

Financial Impact: This phase of the project will be funded from FY25 Capital Reserve Funds (uncommitted balance \$18.21 million at September 30, 2025). The project is expected to result in a decrease of \$1,500 (year 1), and \$3,000 (years 2 thru 3), in annual operating expenditures.

Full Project Estimate: \$5,495,390 funded from Capital Reserve and Appropriated State (nonrecurring) Funds. Contract execution is expected in July 2026 and completion of construction in February 2027. The estimated cost of the project has increased from the Phase I estimate construction due to the escalated mechanical equipment cost from when the internal number was originally generated, and the cost associated with reworking the dedicated outside air system (DOAS) to meet current code requirements. The current DOAS provides unconditioned air directly into the building. The new DOAS will precondition the fresh air and is estimated to cost approximately \$1,756,845. The cost for the Fan Coil Unit Replacement increased from the original estimated cost because the original estimated cost did not consider associated ductwork, piping, or building automated controls.

30. Project: Department of Veterans Affairs  
E26.9902: State Veterans Cemetery – Committal Shelter II
- Request: Establish Phase II Full Construction Budget to construct a second committal shelter at the cemetery.
- Included in CPIP: Yes - 2025 CPIP Priority 3 of 6 in FY26 (estimated at \$1,541,263)
- Phase I Approval: October 2024 (estimated at \$1,280,000) (SFAA)
- Supporting Details: Pages 361-370

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY25 Appropriated State, Proviso 118.20 (B)(61)(c), (Veteran Homes – Capital Improvements)	20,000		20,000		20,000
FY25 Capital Reserve (35)(b), (MJ “Dolly” Cooper State Veterans’ Cemetery – Committal Shelter II)				1,280,000	1,280,000
Other, Deferred Maintenance				240,863	240,863
All Sources	<u>20,000</u>		<u>20,000</u>	<u>1,520,863</u>	<u>1,540,863</u>

Summary of Work: The project will construct an approximately 900 square foot committal shelter. This shelter will be a roofed, open-air pavilion-like structure.

Rationale: Currently the cemetery has one committal service shelter, which is a roofed, open-air pavilion structure with a storage area and an adjoining parking area. The pavilion provides a temporary shelter for families and friends of the deceased to participate in interment services away from the actual grave site. In a veteran’s cemetery, which specific grave sites are not reserved for individuals, the burial area is not a suitable location for the committal service. Based on the current number of funeral services held at the cemetery, the single committal shelter does not adequately support the physical demand needed for a shelter, which places a critical need for the construction of a second shelter.

Facility Characteristics: The MJ “Dolly” Cooper Veterans’ Cemetery is visited by approximately 1,500 clients and 7,350 faculty and staff annually.

Financial Impact: This phase of the project will be funded from FY25 Capital Reserve (uncommitted balance \$18.21 million at September 30, 2025) and Other, Deferred Maintenance Funds (uncommitted balance \$94,352,155 at September 30, 2025). Deferred Maintenance Funds are generated from a combination of sources that include cash transferred from the Office of Mental Health, revenue from the veterans’ homes, and interest earnings. The project is expected to result in an increase of \$400 (year 1), and \$450 (years 2 thru 3), in annual operating expenditures.

Full Project Estimate: \$1,540,863 funded from Capital Reserve, Appropriated State (nonrecurring), and Deferred Maintenance Funds. Contract execution is expected in August 2026 and completion of construction in June 2027.

31. Project: Vocational Rehabilitation Department  
 H73.9630: Conway VR Center Repaving
- Request: Establish Phase II Full Construction Budget to repair and resurface parking lots.
- Included in CPIP: Yes - 2025 CPIP Priority 2 of 7 in FY26 (estimated at \$567,000)
- Phase I Approval: August 2025 (estimated at \$567,000) (SFAA)
- Supporting Details: Pages 371-380

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Federal, State Vocational Rehabilitation Services Grant	20,000		20,000	870,165	890,165
FY25 Appropriated State, Proviso 118.20 (B)(27)(a), (Conway VR Center Repaving)				141,750	141,750
All Sources	<u>20,000</u>		<u>20,000</u>	<u>1,011,915</u>	<u>1,031,915</u>

Summary of Work: The project will resurface and repair the existing parking lot and loading area at the vocational rehabilitation center. The work includes demolition, striping, lighting, landscaping, and gate and fencing.

Rationale: The existing parking and load area are deteriorating and need repair and resurfacing.

Facility Characteristics: The Conway Vocational Rehabilitation (VR) Center is 23,500 square feet and was constructed in 1978 (47 years old). The parking lot is 2,360 square feet and the loading area is 2,970 square feet. The center provides vocational rehabilitation services to individuals with a wide range of disabilities. It is utilized by 27 staff and 20 to 30 consumers daily.

Financial Impact: This phase of the project will be funded from Federal, State Vocational Rehabilitation Services Grant (uncommitted balance \$68.88 million at September 15, 2025) and FY25 Appropriated State (nonrecurring) Funds (uncommitted balance \$141k at September 15, 2025). The project is expected to result in an increase of \$400 (year 1), and \$1,200 (years 2 thru 3), in annual operating expenditures for lighting.

Full Project Estimate: \$1,031,915 funded from State Vocational Rehabilitation Services Grant and Appropriated State (nonrecurring) Funds. Contract execution is expected in March 2026 and completion of construction in September 2026. The estimated cost to complete the project has increased from the 2025 CPIP and Phase I estimate because an updated estimate was received reflecting cost escalation and the need for an 8" inch stone base in lieu of the 6" stone base originally estimated due to soil conditions. Additionally, professional service fees increased due to additional surveys and documentation required by Horry County.



32. Project: Vocational Rehabilitation Department  
 H73.9632: Lexington VR Center Repaving
- Request: Establish Phase II Full Construction Budget to repair and resurface parking lots.
- Included in CPIP: Yes – 2025 CPIP Priority 3 of 7 in FY26 (estimated at \$707,400)
- Phase I Approval: August 2025 (estimated at \$707,400) (SFAA)
- Supporting Details: Pages 381-390

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Federal, State Vocational Rehabilitation Services Grant	20,000		20,000	910,655	930,655
FY25 Appropriated State, Proviso 118.20 (B)(27)(b), (Lexington VR Center Repaving)				176,850	176,850
All Sources	<u>20,000</u>		<u>20,000</u>	<u>1,087,505</u>	<u>1,107,505</u>

Summary of Work: The project will resurface and repair the existing parking lot and loading area at the vocational rehabilitation center. The work includes demolition, striping, lighting, landscaping, gate and fencing.

Rationale: The existing parking and load area are deteriorating and need repair and resurfacing.

Facility Characteristics: The Lexington Vocational Rehabilitation (VR) Center is 12,000 square feet and was constructed in 1980 (45 years old). The parking lot is 5,160 square feet and the loading area is 2,500 square feet. The center provides vocational rehabilitation services to individuals with a wide range of disabilities. It is utilized by 35 staff and 35 to 45 consumers daily.

Financial Impact: This phase of the project will be funded from Federal, State Vocational Rehabilitation Services Grant (uncommitted balance \$68.88 million at September 15, 2025) and FY25 Appropriated State (nonrecurring) Funds (uncommitted balance \$176k at September 15, 2025). The project is expected to result in an increase of \$400 (year 1), and \$1,200 (years 2 thru 3), in annual operating expenditures for lighting.

Full Project Estimate: \$1,107,505 will be funded from State Vocational Rehabilitation Services Grant and Appropriated State (nonrecurring) Funds. Contract execution is expected in March 2026 and completion of construction in September 2026.

33. Project: State Museum Commission  
H95.9508: RTE Innovation Wing Renovation

Request: Establish Phase II Full Construction Budget to renovate the Innovation Wing of the State Museum.

Included in CPIP: Yes – 2025 CPIP Priority 1 of 3 in FY26 (estimated at \$15,000,000)

Supporting Details: Pages 391-402

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY22 Appropriated State, Proviso 118.18 (B)(7)(a), (Permanent Gallery Renovation Phase II)				3,702,318	3,702,318
FY23 Appropriated State, Proviso 118.19 (B)(30)(a), (Permanent Gallery Renovation – Reimagine the Experience RTE - Phase III)				2,895,077	2,895,077
FY25 Appropriated State, Proviso 118.20 (B)(24), (Reimagine the Experience Permanent Gallery Improvement Project)				4,255,465	4,255,465
FY26 Appropriated State, Proviso 118.22 (B)(30)(a), (Reimagine the Experience Permanent Gallery Improvement Project)				4,147,140	4,147,140
All Sources				<u>15,000,000</u>	<u>15,000,000</u>

Summary of Work: The project will redesign and renovate space on the 1<sup>st</sup> and 4<sup>th</sup> floors of the building. The bulk of this space will be the newly acquired former Department of Public Health office spaces, in addition to the renovation and incorporation of approximately 10,000 square feet of adjoining current museum exhibition space on the 4th floor, in development of the new “Innovation Wing” concept around the Observatory. Additional new space on the 4th floor will be developed for special events and programming uses, incorporating exhibition display and artifact storage, in addition to updated restrooms, staff workspaces and storage to support operations. The new space on the first floor will be renovated to expand the school and camp programming, with updated restrooms, workspaces and storage areas for programmatic support. The work will include building walls, refinishing floors, installing new electrical and data services, painting and fixtures, as well as plumbing, outdoor pavement, shelters, and guest improvements and signage.

Rationale: According to the agency, the project will ensure that the facility is fully ADA accessible, and that the exhibitions and educational programs are engaging, informative, and compatible with current technology. The additional programmatic space on the first floor will accommodate expanded school and camp offerings. The overall work will stand as the largest “Reimagine the Experience” (RTE) museum renovation to date and will set the tone for remaining gallery updates to follow.

- Facility Characteristics: The Columbia Mills building is 245,951 square feet and was constructed in 1893 (132 years old). The entire building was renovated for current uses in 1988 (37 years ago). Approximately 40,000 square feet of building to create the “Innovation Wing”, will be renovated in this project. The building is utilized by operations, collections & exhibitions, programs, school visits, camps, and special events. The museum has an estimated 235,000 visitors annually.
- Financial Impact: The project will be funded from FY22 Appropriated State (nonrecurring) (uncommitted balance \$3.7 million at October 15, 2025), FY23 Appropriated State (nonrecurring) (uncommitted balance \$2.89 million at October 15, 2025), FY25 Appropriated State (nonrecurring) (uncommitted balance \$4.25 million at October 15, 2025), and FY26 Appropriated State (nonrecurring) Funds (uncommitted balance \$20 million at October 15, 2025). The project is not expected to result in any change in annual operating expenditures because it is expected that additional operating costs have already been budgeted due to the new lease and resulting rent increase, and previous requests for additional recurring funds to operate the renovated museum. The bulk of additional costs should be additional rent and energy costs which have been factored into the agency’s recurring appropriation.
- Full Project Estimate: \$15,000,000 (internal) funded from Appropriated State (nonrecurring) Funds. This project is being requested for establishment at Phase II because it is fully funded from legislatively authorized funds. Contract execution is expected in May 2026 and completion of construction in December 2027.

34. Project: Department of Behavioral Health & Developmental Disabilities (Office of Mental Health)  
 J12.9884: Patient Lodges B&F - HVAC Repairs and Mold Remediation
- Request: Establish Phase I Pre-Design Budget to repair HVAC and remediate mold.
- Included in CPIP: No – The need for the project was unknown during the 2025 CPIP submission process.
- Supporting Details: Pages 403-410

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Capital Improvement & Maintenance				15,833	15,833
All Sources				<u>15,833</u>	<u>15,833</u>

Summary of Work: The project will repair existing air-handler internal condensation drainage systems, add secondary air-handler condensation drainage systems, repair and/or replace HVAC ductwork and/or insulation, and remediate mold infestation caused by malfunctioning internal air-handler condensation drainage systems, absence of secondary condensation drainage systems, and uninsulated HVAC supply diffusers.

Rationale: As the agency was proceeding with scheduling replacement of the obsolete and partially functioning fire alarm system, the presence of hazardous mold was detected as resulting from condensation related to damaged HVAC ductwork system insulation and improperly functioning HVAC air-handler's internal condensation collection pans, and the absence of secondary condensation collection and drainage systems that are required by contemporary mechanical codes. The replacement of the obsolete and failing fire alarm that is required by life-safety codes needs to begin and to be safely completed as quickly and efficiently as possible. To do that, safe access for the fire alarm system contractor(s) to the patient lodges is required.

Facility Characteristics: Patient Lodge B and Patient Lodge F on the Bryan/Hall Psychiatric Hospital campus are each 12,995 square feet and were constructed in 1977 (48 years old). The patient lodges house inpatient psychiatric adults and adolescents. Bryan Psychiatric Hospital includes 525 full time staff and 200+ outpatients.

Financial Impact: The project will be funded from Other, Capital Improvement and Maintenance Funds (uncommitted balance \$23.35 million at October 17, 2025). Revenue to this fund is authorized by Proviso 35.7 (Act 97 of 2017) permitting deposit of amounts appropriated for deferred maintenance and other one-time funds from any source into an interest-bearing fund held by the State Treasurer for, among other purposes and subject to required approvals, capital projects and ordinary repair and maintenance. The project is not expected to result in any change in annual operating expenditures.

Full Project Estimate: \$1,064,667 (internal) funded from Capital Improvement and Maintenance Funds.

35. Project: Department of Behavioral Health & Developmental Disabilities (Office of Mental Health)  
 J12.9883: Patient Lodge A Mold Remediation & HVAC Repairs
- Request: Establish Phase II Full Construction Budget for mold remediation and HVAC system repairs in a patient lodge.
- Included in CPIP: No – The need for the project was unknown during the 2025 CPIP submission process.
- Supporting Details: Pages 411-418

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Capital Improvement & Maintenance				322,610	322,610
All Sources				<u>322,610</u>	<u>322,610</u>

Summary of Work: The project will complete mold remediation and HVAC system repairs in Patient Lodge A at the psychiatric hospital.

Rationale: The agency is requesting retroactive approval at Phase II for this project which was procured as an emergency. Lodges A and F are currently closed, and the agency has no vacant lodge available for relocating patients in the event of an emergency in one of the occupied lodges, which is best practice as part of maintaining compliance with hospital accreditation. As the agency was proceeding with scheduling replacement of the fire alarm system, the presence of hazardous mold was detected as resulting from condensation related to damaged HVAC ductwork system insulation and improperly functioning HVAC air-handler's internal condensation collection pans, including the absence of secondary condensation collection and drainage systems. Lodge A was identified as requiring the least remediation, so it was selected for the emergency work. Notification of the emergency was provided to JBRC Staff on October 29, 2025. The replacement of the obsolete and failing fire alarm that is required by life-safety codes needed to begin and to be safely completed as quickly and efficiently as possible which required safe access for the fire alarm system contractor(s) to the vacant patient lodges.

Facility Characteristics: Patient Lodge A on the Bryan/Hall Psychiatric Hospital campus is 12,995 square feet and was constructed in 1977 (48 years old). The patient lodge houses inpatient psychiatric adults and adolescents. Bryan Psychiatric Hospital includes 525 full time staff and 200+ outpatients.

Financial Impact: The project will be funded from Other, Capital Improvement and Maintenance Funds (uncommitted balance \$23.35 million at October 17, 2025). Revenue to this fund is authorized by Proviso 35.7 (Act 97 of 2017) permitting deposit of amounts appropriated for deferred maintenance and other one-time funds from any source into an interest-bearing fund held by the State Treasurer for, among other purposes and subject to required approvals, capital projects and ordinary repair and maintenance. The project is not expected to result in any change in annual operating expenditures.

Full Project Estimate: \$322,610 (internal) funded from Capital Improvement and Maintenance Funds. The contract was executed in October 2025 and completion of construction is expected in January 2026.

36. Project: Department of Juvenile Justice  
 N12.9645: Public Safety/Dispatch Building Replacement
- Request: Establish Phase II Full Construction Budget to construct a replacement building.
- Included in CPIP: Yes – 2025 CPIP Priority 1 of 6 in FY27 (estimated at \$5,000,000)
- Supporting Details: Pages 419-428

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Appropriated State, Carryforward				5,000,000	5,000,000
All Sources				<u>5,000,000</u>	<u>5,000,000</u>

- Summary of Work: The project will construct a replacement Public Safety/Dispatch Building with a purpose-built building. The roof has been evaluated by the Department of Administration and has been determined to comply with JBRC policy and will come with the minimum 20-year material and workmanship warranty.
- Rationale: The existing Public Safety/Dispatch Building was constructed as a single-family home. Due to its light frame construction and its change in occupancy this building has suffered over the years and is due for replacement. This project will enhance the agency's emergency response, dispatch operations and the safety and security of its juveniles and staff.
- Facility Characteristics: The existing Public Safety/Dispatch Building is approximately 1,500 square feet and was constructed in 1965 (60 years old). The existing building will be demolished at a later date, and the current employee health modular will be reused by another area. The new building to be constructed will be approximately 5,500 square feet and will be located near the current building located outside the secure perimeter of the Midlands Evaluation Development Center campus at 4900 Broad River Road. The new building will house approximately 25 security, communications, and health services staff.
- Financial Impact: The project will be funded from Appropriated State, Carryforward Funds (uncommitted balance is \$12.56 million at October 13, 2025). The project is not expected to result in any change in annual operating expenditures.
- Full Project Estimate: \$5,000,000 funded from Carryforward Funds. Contract execution is expected in April 2026 and completion of construction in June 2028. This project is being requested for establishment at Phase II because the agency originally planned to combine Public Safety/Dispatch, Employee Health and the Midlands Evaluation Center gatehouse into a single building in project N12-9637. Due to site constraints identified in Phase I, Dispatch and Employee Health were separated from the gatehouse project in October 2025. The Phase I Pre-Design activities were completed as part of that project.

37. Project: Forestry Commission  
 P12.9614: Carvers Bay State Forest
- Request: Establish Preliminary Land Acquisition for the purpose of investigating the acquisition of +/- 8,035 acres in Georgetown County.
- Included in CPIP: No – The property was not available until after the 2025 CPIP submission process.
- Supporting Details: Pages 429-454

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Timber Sales Revenue				80,000	80,000
All Sources				<u>80,000</u>	<u>80,000</u>

- Rationale: The agency has identified this property as a high priority for conservation of working lands. If acquired, this property will be enrolled into the Department of Natural Resources wildlife management area program. This property will also be placed into Forest Certification and managed for timber production and recreation. This tract will become the Carvers Bay State Forest and become part of the State Forest program within the Forestry Commission.
- Characteristics: The property is a forest land tract that is made up of 90 percent pine plantation. The trees are of varying ages. The property is near Plantersville, approximately 10 miles north of Georgetown. It is adjacent to other Timber Investment Management Organization land and near Resource Management System conservation and easement properties.
- Financial Impact: The property is being offered by The Conservation Fund for the proposed purchase price of \$36,274,500. The due diligence activities will be funded from Other, Timber Sales Revenue Funds (uncommitted balance \$7.16 million at September 8, 2025). Revenue to this fund is generated from all timber sales and all pine straw sales from all five state forests. The project is not expected to result in any change in annual operating expenditures because it will be managed by existing resources.
- Full Project Estimate: \$36,354,500 (internal). The Final Land Acquisition will be funded from US Forest Service, SC Conservation Bank, SC Office of Resilience, and Forestry Commission Funds.
- Other: The Forestry Commission has coordinated and collaborated with the South Carolina Conservation Bank to confirm that the proposed conservation land acquisition of this property is an appropriate conservation purchase and will maximize the most cost-effective use of funds appropriated or authorized by the General Assembly in the proposed purchase.

38. Project: Department of Natural Resources  
 P24.6114: Georgetown - Samworth WMA Dirleton House Renovations
- Request: Establish Phase II Full Construction Budget to renovate the Dirleton House.
- Included in CPIP: Yes – 2025 CPIP Priority 9 of 60 in FY26 (estimated at \$529,200)
- Phase I Approval: February 2025 (estimated at \$528,000) (SFAA)
- Supporting Details: Pages 455-462

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Appropriated State, Carryforward	7,920		7,920	521,280	529,200
All Sources	<u>7,920</u>		<u>7,920</u>	<u>521,280</u>	<u>529,200</u>

Summary of Work: The project will make exterior and interior repairs and renovations to the three-story historic Dirleton House at the Samworth Wildlife Management Area. The work will include exterior painting, porch deck repairs, floor repairs and refinishing on the first and second floors, siding replacement as needed, handicap ramp replacement, and stair replacements. Due to the historical significance, high pressure washing of the exterior is not allowed. Specific prepping techniques before painting must be conducted. Structural repairs to the house must also not be changed or altered from the original design due to the historical significance.

Rationale: The project will protect assets and maintain the facility according to National Historic Registry standards.

Facility Characteristics: The Dirleton House is 7,000 square feet and was constructed in the 1850's (170+ years old). Approximately 3,000 square feet of the building will be impacted by the project. The house is listed on the National Historical Register. Approximately 15 staff utilize the house daily as office space. Additionally, it can accommodate 50-70 people at a time for meetings.

Financial Impact: The project will be funded from FY25 Appropriated State, Carryforward Funds (uncommitted balance \$930k at September 9, 2025). The project is not expected to result in any change in annual operating expenditures.

Full Project Estimate: \$529,200 will be funded from Carryforward Funds. Contract execution is expected in January 2026 and completion of construction in December 2026.



39. Project: Department of Natural Resources  
 P24.6096: Greenville – North Saluda River WMA Land Donation (NLT)
- Request: Establish Preliminary Land Acquisition for the purpose of investigating the acquisition of +/- 32 acres in Greenville County.
- Included in CPIP: Yes – 2025 CPIP Priority 26 of 60 in FY26 (estimated at \$20,000)
- Supporting Details: Pages 463-480

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY23 Appropriated State, Proviso 118.19 (B)(44)(f), (Land Conservation) (transfer from P24-6078)				5,370	5,370
FY23 Appropriated State, Proviso 118.19 (B)(44)(f), (Land Conservation) (transfer from P24-6083)				13,130	13,130
FY23 Appropriated State, Proviso 118.19 (B)(44)(f), (Land Conservation) (transfer from P24-6087)				1,500	1,500
All Sources				<u>20,000</u>	<u>20,000</u>

- Rationale: Acquisition of the property will help protect a population of American ginseng, endangered in South Carolina, and conserve population numbers. The property will also provide valuable public access for trout fishing on the Saluda River. If acquired, the property will be designated as a Wildlife Management Area and placed into DNR's WMA program.
- Characteristics: The property is adjacent to privately conserved lands that act as a buffer to N. Highway 25 directly to the east. It provides bank access to an approximate half mile stretch on the North Saluda River and gives wading access beyond the property's boundaries.
- Financial Impact: The property is offered by Naturaland Trust as a donation. The due diligence activities will be funded from FY23 Appropriated State (nonrecurring) Funds (uncommitted balance \$20k at September 10, 2025). The project is not expected to result in any change in annual operating expenditures.
- Full Project Estimate: \$20,000 (internal) funded from Appropriated State (nonrecurring) Funds.
- Other: The South Carolina Department of Natural Resources has coordinated and collaborated with the South Carolina Conservation Bank to confirm the proposed conservation land acquisition of this property is an appropriate conservation purchase and it will maximize the most cost-effective use of funds appropriated or authorized by the General Assembly in the proposed purchase.

40. Project: Department of Natural Resources  
 P24.6110: Jasper - Coosawhatchie HP/WMA Land Acquisition VIII (TNC - Bigby)

Request: Establish Preliminary Land Acquisition for the purpose of investigating the acquisition of +/- 635 acres in Jasper County.

Included in CPIP: Yes – 2025 CPIP Priority 42 of 60 in FY26 (estimated at \$1,800,000)

Supporting Details: Pages 481-498

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Federal, US Forest Service				20,000	20,000
All Sources				<u>20,000</u>	<u>20,000</u>

Rationale: Acquisition of the property will expand the pre-existing Coosawhatchie HP/WMA and will eliminate a large inholding within the Department of Natural Resources owned land. Restoration of the previously harvested hardwood floodplain/swamp is critical for flood control, water filtration, carbon sequestration, and habitat utilization by state and federal species of concern and to maintain the integrity of the larger ecosystem footprint of the HP/WMA. Expanding the HP/WMA will increase public recreation opportunities including riverbank fishing, hunting, birdwatching, and academic research. If acquired, the property will be designated as a Wildlife Management Area.

Characteristics: The property is contiguous with Coosawhatchie HP/WMA. The property contains habitat for gopher tortoises, a keystone species, which are currently listed as endangered in South Carolina.

Financial Impact: The property is offered by The Nature Conservancy for the proposed purchase price of \$1,780,000. The due diligence activities acquisition will be funded from Federal, US Forest Service Funds (uncommitted balance \$741k at September 17, 2025). The project is expected to result in an increase of \$6,000 (year 1) and \$1,000 (years 2 thru 3) in annual operating expenditures.

Full Project Estimate: \$1,800,000 (internal). The Final Land Acquisition will be funded from Heritage Land Trust Funds.

Other: The South Carolina Department of Natural Resources has coordinated and collaborated with the South Carolina Conservation Bank to confirm the proposed conservation land acquisition of this property is an appropriate conservation purchase and it will maximize the most cost-effective use of funds appropriated or authorized by the General Assembly in the proposed purchase.

41. Project: Department of Natural Resources  
 P24.6121: Horry – Little Pee Dee HP/WMA Donation (Gunter’s Island)

Request: Establish Preliminary Land Acquisition for the purpose of investigating the acquisition of +/- 595 acres in Horry County.

Included in CPIP: Yes – 2025 CPIP Priority 36 of 60 in FY26 (estimated at \$20,000)

Supporting Details: Pages 499-512

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Heritage Land Trust				50,000	50,000
All Sources				<u>50,000</u>	<u>50,000</u>

Rationale: If acquired, the property will be part of a network of protected lands, including the over 6,200 acres of adjacent land owned by the Department of Transportation, that the Department of Natural Resources will eventually own as part of a Department of Transportation mitigation project. The property is less than 12 miles from Conway and 25 miles from Myrtle Beach. It will provide a valuable site for public recreation opportunities, primarily hunting and fishing. The Little Pee Dee is also important for fishing and boating recreation, and the SC Rivers Assessment rates the Little Pee Dee as “superior” for inland fisheries habitat and recreational boating. The property will serve as an important buffer to the floodplain and river, which act as a habitat for diadromous fish species such as shad and provides habitat for rare plant species.

Characteristics: The property is sited along the Little Pee Dee River, which acts as the border between Marion and Horry counties. It is contiguous to sections of Little Pee Dee River Heritage Preserve and the nearby Woodbury WMA in Marion County. Palmetto Swamp, a tributary to Little Pee Dee River, runs for roughly one mile through the property. The property consists of Pee Dee River floodplain forest dominated by bottomland swamp vegetation such cypress, with upland portions consisting of loblolly pine plantations. Game species are prevalent on the tract as well as non-game species, especially bottomland birds.

Financial Impact: The property is offered by The Nature Conservancy as a donation. The due diligence activities will be funded from Other, Heritage Land Trust Funds (uncommitted balance \$40.38 million at September 10, 2025). SC Code 51-17-115 provides for the department to use Heritage Land Trust Funds to acquire in fee simple or lesser interest in priority areas, legal fees, appraisals, surveys, or other costs involved in the acquisition of priority areas, and for the development of minimal facilities and management necessary for the protection of priority areas. If acquired, no construction will be completed on the property. The project is expected to result in an increase of \$10,000 (year 1) and \$5,000 (years 2 thru 3), in annual operating expenditures.

Full Project Estimate: \$50,000 (internal) funded from Heritage Land Trust Funds. This is a large tract of land that has few visual boundary indicators and requires a complete survey.

Other: The South Carolina Department of Natural Resources has coordinated and collaborated with the South Carolina Conservation Bank to confirm that the proposed conservation land acquisition of this property is an appropriate conservation purchase and will maximize the most cost-effective use of funds appropriated or authorized by the General Assembly in the proposed purchase.

42. Project: Department of Natural Resources  
 P24.6123: Horry – Waccamaw River HP/WMA Land Donation (TNC Loris, Ellis, Bellamy)
- Request: Establish Preliminary Land Acquisition for the purpose of investigating the acquisition of +/- 4,006 acres in Horry County.
- Included in CPIP: Yes – 2025 CPIP Priority 36 of 60 in FY26 (estimated at \$20,000)
- Supporting Details: Pages 513-528

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Heritage Land Trust				50,000	50,000
All Sources				<u>50,000</u>	<u>50,000</u>

Rationale: The properties support surface-water infiltration to groundwater and provides flood-flow attenuation and water quality improvement functions that benefit the adjacent heritage preserve and Waccamaw River system, provide additional access points to the HP-WMA, and eliminate shared roads into and within the three parcels with the current owner. The SC Rivers Assessment rates the Waccamaw as “superior” for inland fisheries and wildlife habitat, recreational fishing and boating, and natural features. If acquired, these additions will provide buffers to the existing HP-WMA and expand the HP-WMA by approximately 47 percent. Being contiguous with the Heritage Preserve, protection of the site would add to a corridor of protected lands along the Waccamaw River.

Characteristics: The property is made up of three parcels: Loris, 2,827 acres, Bellamy, 629 acres, and Ellis, 550 acres. They are near the dense population centers of Conway and Myrtle Beach and protection will provide additional land for hunting, fishing, hiking, birdwatching, and wildlife watching. The Loblolly pine plantations will be managed and used for revenue in the future. In addition, there are several rare plant species and at least five State Wildlife Action Plan priority species that have been documented on tracts of the Waccamaw River HP adjacent to these properties. The southeastern property line is contiguous with portions of the Waccamaw River Heritage Preserve. The physiography of the river floodplain here is complicated, with a former river channel and diverse elevation changes. This has created a matrix of vegetation types including many variants of alluvial swamp forests dominated by hardwoods and bald cypress. Higher elevation areas have been converted to a bedded loblolly pine plantation. There are also areas of pond pine flatwoods. The complexity of the site makes it excellent habitat for diverse wildlife, including terrestrial and aquatic species.

Financial Impact: The property is offered by The Nature Conservancy as a donation. The due diligence activities will be funded from Other, Heritage Land Trust Funds (uncommitted balance \$40.38 million at September 10, 2025). SC Code 51-17-115 provides for the department to use Heritage Land Trust Funds to acquire in fee simple or lesser interest in priority areas, legal fees, appraisals, surveys, or other costs involved in the acquisition of priority areas, and for the development of minimal facilities and management necessary for the protection of priority areas. If acquired, no construction will be completed on the property. The project is expected to result in an increase of \$25,000 (year 1) and \$5,000 (years 2 thru 3), in annual operating expenditures.

Full Project Estimate: \$50,000 (internal) funded from Heritage Land Trust Funds. This is a large tract of land that has few visual boundary indicators and requires a complete survey.

Other:                      The South Carolina Department of Natural Resources has coordinated and collaborated with the South Carolina Conservation Bank to confirm that the proposed conservation land acquisition of this property is an appropriate conservation purchase and will maximize the most cost-effective use of funds appropriated or authorized by the General Assembly in the proposed purchase.

43. Project: Department of Natural Resources  
 P24.6130: Colleton-St. Helena HP-WMA Land Acquisition (S Fenwick Island Maybank)
- Request: Establish Preliminary Land Acquisition for the purpose of investigating the acquisition of +/- 16.8 acres in Colleton County.
- Included in CPIP: Yes – 2025 CPIP Priority 19 of 60 in FY26 (estimated at \$20,000)
- Supporting Details: Pages 529-548

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Federal, NOAA National Estuarine Research Reserve (NERR) Grant				20,000	20,000
All Sources				<u>20,000</u>	<u>20,000</u>

- Rationale: Acquisition of this property will protect key parcels on the island and allow for comprehensive management, including prescribed burning and invasive species control. The property will be used by the public for outdoor recreational activities, including hunting, hiking, and viewing wildlife. Private lands available for outdoor activities continue to diminish; therefore, demand for public lands to engage in these activities continue to increase. If acquired, it will become a Wildlife Management Area (WMA), part of St. Helena Sound Heritage Preserve (HP) WMA.
- Characteristics: This tract is an inholding consisting of 3 parcels located on South Fenwick Island adjacent to St. Helena Sound HP/WMA. The property is dominated by maritime forest and contains frontage along the Ashepoo River on the western boundary. The property is accessible only by boat with a private dock.
- Financial Impact: The property is offered by the Maybank Family to the Nature Conservancy for the proposed purchase price of \$620,000. The Nature Conservancy is offering the Department of Natural Resources the property, for a currently undetermined purchase price less than \$620,000. The due diligence activities will be funded from Federal, NOAA National Estuarine Research Reserve (NERR) Grant Funds (uncommitted balance \$640k at September 10, 2025). If acquired, no construction will be completed on the property. The project is expected to result in an increase of \$5,000 (years 1 thru 3), in annual operating expenditures.
- Full Project Estimate: \$640,000 (internal) funded from NOAA National Estuarine Research Reserve (NERR) Grant Funds.
- Other: The South Carolina Department of Natural Resources has coordinated and collaborated with the South Carolina Conservation Bank to confirm that the proposed conservation land acquisition of this property is an appropriate conservation purchase and will maximize the most cost-effective use of funds appropriated or authorized by the General Assembly in the proposed purchase.

44. Project: Department of Natural Resources  
 P24.6132: Calhoun – Congaree Bluffs HP Land Acquisition (Creech)

Request: Establish Preliminary Land Acquisition for the purpose of investigating the acquisition of +/- 482 acres in Calhoun County.

Included in CPIP: Yes – 2025 CPIP Priority 13 of 60 in FY26 (estimated at \$20,000)

Supporting Details: Pages 549-566

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Heritage Land Trust				30,000	30,000
All Sources				<u>30,000</u>	<u>30,000</u>

Rationale: Acquisition of the property will expand the Congaree Bluffs Heritage Preserve and add to a corridor of conserved lands along the section of the Congaree River, which includes Congaree National Park and lands protected by conservation easements held by Ducks Unlimited, Congaree Land Trust, and USDA-NRCS. The S.C. Rivers Assessment attributes “superior” values to the Congaree River for fisheries habitat, recreational fishing, history and culture, and natural features, and outstanding values for boating. Additions to Congaree Bluffs HP, less than an hour drive from Columbia, would be an asset for the public and add to the natural and cultural significance of the area by providing beautiful scenic hikes and views. If acquired, the property would be added as a HP-WMA. It will be dedicated as a Heritage Preserve and added to the existing Congaree Bluffs Heritage Preserve, and it will also be used as a Wildlife Management Area.

Characteristics: The property is a timber-management tract on the bluffs of the Congaree River, south of the Congaree National Park across the Congaree River, which is connected along the east boundary. The property sits at the extreme eastern edge of the Fall Line Sandhills physiographic region at the edge of the Coastal Plain region. The most significant ecological feature in this area is a series of north facing bluffs along the south shoreline of the Congaree River. The dominant vegetation on the bluffs is Basic Mesic Forest, a very rare plant community in the state, especially in the sandhills. The property also contains approximately 100-200 acres of loblolly pine plantation that could be harvested and used for revenue. The remainder of the property is a combination of early successional mixed hardwood-pine forests and game fields. A small stream emerges from drainages on the bluff that, based on topographic maps and aerial photos, provides close to 1.8 miles of stream habitat on the property.

Financial Impact: The property is offered by Creech Family Limited Partnership for the proposed purchase price of \$2,500,000. The due diligence activities will be funded from Other, Heritage Land Trust Funds (uncommitted balance \$40.38 million at September 10, 2025). SC Code 51-17-115 provides for the department to use Heritage Land Trust Funds to acquire in fee simple or lesser interest in priority areas, legal fees, appraisals, surveys, or other costs involved in the acquisition of priority areas, and for the development of minimal facilities and management necessary for the protection of priority areas. If acquired, no construction will be completed on the property. The project is expected to result in an increase of \$10,000 (years 1) and \$5,000 (years 2 thru 3), in annual operating expenditures.

Full Project Estimate: \$2,530,000 (internal) funded from Heritage Land Trust Funds. The Phase I amount requested is \$30k due to anticipated higher than normal due diligence costs for surveying.

Other:                      The South Carolina Department of Natural Resources has coordinated and collaborated with the South Carolina Conservation Bank to confirm that the proposed conservation land acquisition of this property is an appropriate conservation purchase and will maximize the most cost-effective use of funds appropriated or authorized by the General Assembly in the proposed purchase.



45. Project: Department of Natural Resources  
P24.6097: Marion-Marsh WMA Land Acquisition (Waterfront Preservation)
- Request: Establish Final Land Acquisition to purchase +/- 491 acres in Marion County.
- Included in CPIP: Yes – 2025 CPIP Priority 47 of 60 in FY26 (estimated at \$1,020,000)
- Phase I Approval: September 2024 (estimated at \$1,000,000) (SFAA)
- Supporting Details: Pages 567-592

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY24 Appropriated State, Proviso 118.19 (B)(37)(b), (Habitat Protection and Land Conservation Acquisitions)	20,000		20,000	250,000	270,000
Federal, USDA US Forest Service Forest Legacy Grant				750,000	750,000
All Sources	<u>20,000</u>		<u>20,000</u>	<u>1,000,000</u>	<u>1,020,000</u>

Rationale: Acquisition of the property will protect property along the Pee Dee River that provides riparian, wetland, and aquatic habitats, floodwater storage, flood-flow attenuation, and water quality improvement functions. Protection of the property will enhance and expand the protection of riparian and aquatic habitats. The property will be open to the public for outdoor recreation as part of the adjacent Wildlife Management Area.

Characteristics: The property adjoins Marsh Wildlife Management Area and is on the Pee Dee River floodplain. Ninety percent of the property is palustrine-wetland habitat and located within a Flood Hazard Area, 100-year floodplain. The property borders 0.7 miles of the Pee Dee River and several sections of stream (portions of the Bull Swamp/Mulyn Creek system) run from NW to SE across the property.

Financial Impact: The property is offered by Waterfront Preservation Foundation, Inc. for \$1,000,000. The acquisition will be funded from FY24 Appropriated State (nonrecurring) (uncommitted balance \$14.15 million at September 11, 2025) and Federal, USDA US Forest Service Legacy Grant Funds (uncommitted balance \$750k at September 11, 2025). The project is expected to result in an increase of \$33,000 (year 1), and \$1,500 (year 2), and \$1,000 (year 3), in annual operating expenditures. An appraisal was completed June 2025 and valued the property at \$1,000,000. A Phase I Environmental Site Assessment was completed in September 2025 and revealed no evidence of recognized environmental conditions in connection with the property. A Building Condition Assessment is not required because there are no buildings located on the property. Letters of support are not required because the property is owned by a non-profit entity and therefore the property is not included on the tax rolls.

Full Project Estimate: \$1,020,000 funded from Appropriated State (nonrecurring), and US Forest Service Forest Legacy Grant Funds.

Other: The South Carolina Department of Natural Resources has coordinated and collaborated with the South Carolina Conservation Bank to confirm that the proposed conservation land acquisition of this property is an appropriate conservation purchase and will maximize the most cost-effective use of funds appropriated or authorized by the General Assembly in the proposed purchase.

46. Project: Department of Natural Resources  
P24.6099: Sumter/Lee - Bobwhite Hills Land Acquisition (Player)

Request: Establish Final Land Acquisition to purchase +/- 774 acres in Sumter and Lee Counties.

Included in CPIP: Yes – 2025 CPIP Priority 55 of 60 in FY26 (estimated at \$715,000)

Phase I Approval: April 2025 (estimated at \$715,000) (SFAA)

Supporting Details: Pages 593-616

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Fish & Wildlife Protection (Deer)	20,000		20,000		20,000
Other, Fish & Wildlife Protection (Timber)	20,000		20,000		20,000
Other, Fish & Wildlife Protection (License)				675,000	675,000
All Sources	<u>40,000</u>		<u>40,000</u>	<u>675,000</u>	<u>715,000</u>

Rationale: Acquisition of the property will increase habitat connectivity and provide additional land for the public to engage in outdoor recreational and educational activities.

Characteristics: The property adjoins a 2,490-acre tract leased by DNR as a Wildlife Management Area. The property is composed of an upland longleaf pine savanna ecosystem in an area in which forty-three priority species are known or expected to occur, including four that are classified as federally at-risk.

Financial Impact: The property is offered by Pheasants Forever, Inc. for \$675,000. The acquisition will be funded from Other, Fish & Wildlife Protection (License) (uncommitted balance \$1.67 million at September 15, 2025). Fish & Wildlife Protection License funds are derived from the sale of freshwater fisheries and wildlife licenses, permits, stamps, and tags. No construction will be completed on the property. The project is expected to result in an increase of \$5,000 (year 1), \$2,000 (year 2), and \$1,000 (year 3), in annual operating expenditures. An appraisal was completed June 2025 and valued the property at \$3,000,000. A Building Condition Assessment is not required because there are no buildings located on the property. A Phase I Environmental Site Assessment was completed in July 2025 and found no evidence of recognized environmental conditions in connection with the property. Letters of support are not required because the property is owned by a non-profit entity and therefore the property is not included on the tax rolls.

Full Project Estimate: \$715,000 funded from Fish & Wildlife Protection (Deer), Fish & Wildlife Protection (Timber), and Fish & Wildlife Protection (License) Funds.

Other: The South Carolina Department of Natural Resources has coordinated and collaborated with the South Carolina Conservation Bank to confirm that the proposed conservation land acquisition of this property is an appropriate conservation purchase and will maximize the most cost-effective use of funds appropriated or authorized by the General Assembly in the proposed purchase.

47. Project: Department of Parks, Recreation, and Tourism  
 P28.9870: Table Rock Mountain Laurel Campground
- Request: Establish Phase I Pre-Design Budget to complete campground upgrades.
- Included in CPIP: Yes - 2025 CPIP Priority 14 of 14 in FY27 (estimated at \$1,500,000)
- Supporting Details: Pages 617-624

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Park Revenue				18,375	18,375
All Sources				<u>18,375</u>	<u>18,375</u>

Summary of Work: The project will upgrade the campground to better accommodate modern recreational vehicles (RVs). The work will include installing 50-amp electrical service at each campsite, adding new water hydrant hook-ups at every site, and providing sewer hook-ups at 18 campsites.

Rationale: The upgrades will significantly improve reliability and comfort for RV campers. As RVs grow in popularity, newer models are becoming larger, requiring more power and placing greater demand on existing utility infrastructure, often resulting in increased system outages.

Facility Characteristics: Table Rock State Park provides a total of 94 camping sites with 69 in Mountain Laurel. Some sites can accommodate RV's up to 40 feet. The campground is convenient to restrooms and showers. An estimated 15,000 visitors per year utilize the state park.

Financial Impact: This phase of the project will be funded from Other, Park Revenue Funds (uncommitted balance \$17.05 million at August 27, 2025). Park Revenues are derived from operating revenue generated by the State Park System. The fund collects fees for admission, camping, lodging, and other fees charged for the use of recreational facilities and programs. The project is not expected to result in any change in annual operating expenditures.

Full Project Estimate: \$1,225,000 (internal) funded from Park Revenue, and Appalachian Regional Grant Funds.

48. Project: Department of Parks, Recreation, and Tourism  
 P28.9868: Blackstock Plantation Construction Donation
- Request: Establish Phase II Full Construction Budget to clear approximately 7 acres at Musgrove Mill State Park.
- Included in CPIP: Yes – 2025 CPIP Priority 29 of 33 in FY26 (estimated at \$1,338,772)
- Phase I Approval: August 2025 (estimated at \$1,338,772) (SFAA)
- Supporting Details: Pages 625-632

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, American Battlefield Trust (Construction Related Gift)	20,081		20,081	1,318,691	1,338,772
All Sources	<u>20,081</u>		<u>20,081</u>	<u>1,318,691</u>	<u>1,338,772</u>

- Summary of Work: The project will clear approximately 7 acres of the Blackstock's Plantation Battlefield turning it into a meadow to develop an addition to Musgrove Mill State Park. It will provide trails, facilities, roads and landscape.
- Rationale: Clearing of this property will provide additional space at the park to develop additional educational opportunities to visitors at a new location.
- Facility Characteristics: Musgrove Mill State Park is located in Clinton South Carolina. It receives approximately 45,000 park visitors each year.
- Financial Impact: The project will be funded from Other, American Battlefield Trust Funds (construction related gift up to \$1.34 million at September 15, 2025). The project is not expected to result in any change in annual operating expenditures.
- Full Project Estimate: \$1,338,772 funded from American Battlefield Trust Funds. Contract execution is expected in October 2025 and completion of construction in January 2027.

49. Project: Department of Parks, Recreation & Tourism  
P28.9773: Hunting Island Road Repairs
- Request: Increase Phase II Full Construction Budget to cover additional road repairs at the park due to storm damage.
- Included in CPIP: No – It was not included in the 2025 CPIP in error.
- Phase I Approval: January 2019 (estimated at \$1,000,000) (Admin)
- Phase II Approval: February 2020 (estimated at \$2,755,000) (SFAA)
- Phase II Increase Approval: June 2024 (estimated at \$4,297,235) (SFAA)
- Supporting Details: Pages 633-644

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
FY19 Capital Reserve (8), (State Park Maintenance Needs)	15,000	985,000	1,000,000		1,000,000
FY20 Capital Reserve (2), State Parks Deferred Maintenance		800,000	800,000		800,000
FY17 Appropriated State, Proviso 118.16 (B)(39)(g) Medal of Honor Museum (FY20 Appropriated State, Proviso 49.18, State Parks Maintenance)		400,000	400,000		400,000
FY25 Appropriated State, Proviso 118.20 (B)(85)(dddd), (Hunting Island Roads and Grounds Improvements)				1,690,758	1,690,758
Federal, FEMA		1,572,926	1,572,926	126,182	1,699,108
Other, FEMA State Match		524,308	524,308	42,060	566,368
All Sources	<u>15,000</u>	<u>4,282,234</u>	<u>4,297,234</u>	<u>1,859,000</u>	<u>6,156,234</u>

Summary of Work: The project was established to make repairs and pave approximately 8 miles of roads at Hunting Island State Park. The additional funds being added will be used to make additional road and parking repairs and upgrades. This will include road and parking grading and stabilization.

Rationale: Additional repairs are needed due to significant storm damage sustained about a year ago to the roads at Hunting Island.

Facility Characteristics: Hunting Island State Park is one of the most visited and receives approximately 800,000 visitors per year.

Financial Impact: This increase will be funded from FY25 Appropriated State (nonrecurring) (uncommitted balance \$2.5 million at September 9, 2025), Federal, FEMA (uncommitted balance \$126k at September 9, 2025), and Other, FEMA State Match Funds (uncommitted balance \$42k at September 9, 2025). The project is not expected to result in any change in annual operating expenditures.

Full Project Estimate: \$6,156,234 funded from Appropriated State, FEMA and FEMA Match Funds. Completion of construction is expected in January 2027.

50. Project:	Patriots Point Development Authority P36.9544: Pier Repairs
Request:	Establish Phase II Full Construction Budget to make pier repairs at the Patriots Point Naval & Maritime Museum.
Included in CPIP:	Yes – 2025 CPIP Priority 1 of 3 in FY26 (estimated at \$986,320)
Supporting Details:	Pages 645-651

Source of Funds	Original Budget Amount	Cumulative Changes Since Original Budget	Current Budget	Adjustment Requested	Total Budget After Current Adjustment
Other, Admissions Revenue				1,183,584	1,183,584
All Sources				<u>1,183,584</u>	<u>1,183,584</u>

**Summary of Work:** The project will make pier repairs to the main pier and approach pier at the Patriots Point Naval & Maritime Museum. The work includes repairing spalled concrete, removing and replacing expansion joints, and prepping and recoating steel and bridge scaffolding.

**Rationale:** In November 2024, Patriots Point commissioned an emergency assessment through GEL Engineering to ensure the north end of the approach pier could sustain the weight of tanker trucks being utilized to by the SC Office of Resilience to remove oil and contaminants from the USS Yorktown. The assessment indicated it could sustain the weight of the tanker trucks if they were spaced out over the pilings in a certain order and location. Following receipt of this initial information from Gel Engineering, Patriots Point made the decision to have a thorough inspection of the remaining approach pier and the main pier out of concern for the safety of guests and employees using the piers. This subsequent assessment identified structural deficiencies and included the development of construction drawings for repair work to both piers. As such, the agency is requesting approval of the project at Phase II to proceed with the repair work identified. The agency has been advised that a project should have been established prior to the development of construction drawings. Additionally, the Capital Budgeting Office will be working with the agency to review the requirements for the establishment and maintenance of permanent improvement projects.

**Facility Characteristics:** The approach pier is 13,360 square feet and the main pier (pier head) is 13,410 square feet. Both were constructed in the mid-1970's (approximately 50 years old). The piers are used for visitor, employee and emergency access for vehicles. The Patriots Point Naval & Maritime Museum has approximately 250,000 visitors per year.

**Financial Impact:** The project will be funded from Other, Admissions Revenue Funds (uncommitted balance \$15.13 million at August 31, 2025). Admissions Revenue Funds are derived from the park and museum admission fees and revenue from leased property. The project is not expected to result in any change in annual operating expenditures.

**Full Project Estimate:** \$1,183,584 funded from Admissions Revenue Funds. Contract execution is expected in February 2026 and completion of construction in May 2026.

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AGENCY: Public Institutions of Higher Learning

SUBJECT: Permanent Improvement Projects Approved by Governing Boards  
Pursuant to SC Code Section 2-47-52(B)

Section 2-47-52(B) of the South Carolina Code provides:

[P]ermanent improvement projects proposed by public institutions of higher learning as defined in Section 59-103-5, including their related public service activities, are exempt from the requirements of Section 2-47-50 where the costs of the permanent improvements do not exceed ten million dollars for research universities as identified in Section 11-51-30(5) or two million five hundred thousand dollars for all other public institutions of higher learning so long as the institution's governing board votes to approve the project in a public session; provided, however, that acquisitions of land, buildings or other structures, and capital lease purchases of facility acquisitions or construction as defined in items (1), (2), and (3) of Section 2-47-50(D) are subject to review by the committee regardless of cost. Institutions shall provide a report of projects approved by their governing boards pursuant to this subsection, and work on existing facilities including their renovation, repair, maintenance, alteration, or demolition, to the Joint Bond Review Committee and the State Fiscal Accountability Authority of the previous fiscal year's approved projects that meet the same criteria of this subsection by November fifteenth of each year.

Timely reports received by the committee in accordance with this statutory requirement are summarized as follows.

	<u>Projects</u>	<u>Total</u>
Clemson University	8	\$24,370,000
Coastal Carolina University	--	--
College of Charleston	2	\$3,462,514
Francis Marion University	1	\$1,490,359
Lander University	--	--
Medical University of South Carolina	4	\$20,500,000
South Carolina State University	--	--
The Citadel	--	--
University of South Carolina	13	\$39,725,000
Winthrop University	--	--
<u>State Technical College System</u>	<u>6</u>	<u>\$10,461,740</u>
Total		\$100,009,613

These permanent improvement projects are exempt only from the approval provisions of Section 2-47-50; the projects are subject to the other provisions of Chapter 47 of Title 2, along with any applicable policies and procedures of the committee.

COMMITTEE ACTION:

Receive as information.

ATTACHMENT:

1. Public Institutions of Higher Education Permanent Improvement Projects Approved by Governing Boards Pursuant to SC Code Section 2-47-52(B).



Public Institutions of Higher Learning  
Permanent Improvement Projects Approved by Governing Boards  
Pursuant to SC Code Section 2-47-52(B)

Institution	Project	Estimate
Clemson University	Edisto REC: Museum Conversion to Graduate Student Housing	\$1,160,000.00
Clemson University	Fluor Daniel High Bay Area Renovations	\$1,660,000.00
Clemson University	Poole Agricultural Center, Rooms 12-28, HVAC Upgrades	\$1,650,000.00
Clemson University	Biosystems Research Complex Generator Install	\$2,100,000.00
Clemson University	Old Stadium Road New Parking Lot and Site Improvements	\$4,100,000.00
Clemson University	Holmes Hall, HVAC Equipment/Controls Replacement	\$4,900,000.00
Clemson University	CUFD Fire Station Addition	\$4,800,000.00
Clemson University	Alumni and Visitors Center Terraces Expansion	\$4,000,000.00
Coastal Carolina	No Response	
College of Charleston	Addlestone Library 3rd Floor Library HVAC Equipment	\$1,822,514.00
College of Charleston	Sottile Theater RTU 1 Replacement	\$1,640,000.00
Francis Marion University	Village Apartments Interior Renovations	\$1,490,359.00
Lander University	No Response	
Medical University of South Carolina	Capital Renewal Plan Projects	\$4,000,000.00
Medical University of South Carolina	College of Dental Medicine Workforce	\$3,000,000.00
Medical University of South Carolina	Psychiatry Institute Data Center UPS #1 Replacement	\$4,000,000.00
Medical University of South Carolina	College of Health Professions Building A & B Renovations	\$9,500,000.00
South Carolina State University	No Response	
Technical College System	Horry-Georgetown Technical College Automotive Building Expansion	\$2,400,000.00
Technical College System	Greenville Technical College Multi-Campus Renovations	\$1,311,740.00
Technical College System	Piedmont Technical College E-Building Office and Restroom Renovations	\$1,300,000.00
Technical College System	Spartanburg Community College Tyger River Campus Academic 2nd Floor	\$1,250,000.00
Technical College System	Trident Technical College Thornley Campus Bldg. 100 Roof Replacement	\$2,200,000.00
Technical College System	Trident Technical College Thornley Campus Bldg. 200 Roof Replacement	\$2,000,000.00
The Citadel	No Response	
University of South Carolina - Aiken	Softball Field House Construction	\$1,900,000.00
University of South Carolina - Columbia	Benson School Renovation	\$4,250,000.00
University of South Carolina - Columbia	RHUU Improvements & Bookstore Relocation	\$2,000,000.00
University of South Carolina - Columbia	Greene Street United Methodist Church Renovation	\$1,200,000.00
University of South Carolina - Columbia	Athletics Fieldhouse Renovation & Expansion	\$4,200,000.00
University of South Carolina - Columbia	Chilled Water Loop Master Utility Plan Upgrades	\$3,950,000.00
University of South Carolina - Columbia	Williams-Brice Stadium Light Tower Painting	\$2,500,000.00
University of South Carolina - Columbia	1220 Catawba St Building Renovation for MCEd/EnerSys	\$10,000,000.00
University of South Carolina - Columbia	West Energy Cooling Tower & Infrastructure Replacement	\$2,500,000.00
University of South Carolina - Columbia	North Energy Chiller and Infrastructure Replacement	\$2,500,000.00
University of South Carolina - Columbia	McMaster College Envelope Restoration	\$1,100,000.00
University of South Carolina - Columbia	College of Nursing Bio-Behavioral Research Suite Renovation	\$2,025,000.00
University of South Carolina - Upstate	Campus Gateway	\$1,600,000.00
Winthrop University	No Response	

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AGENCY: South Carolina State Housing Finance and Development Authority

SUBJECT: Proposed 2026 Qualified Allocation Plan

As the state-designated allocating agency for the federal Low Income Housing Tax Credit, the South Carolina State Housing Finance and Development Authority is responsible for the adoption of an annual Qualified Allocation Plan in accordance with Section 42 of the Internal Revenue Code.

Section 12-6-3795(C)(3) of the SC Code requires that any qualified allocation plan is subject to the prior review and comment of the Joint Bond Review Committee. Responsive to that requirement, the State Housing Authority has submitted a draft of its proposed Qualified Allocation Plan for 2026.

The 2026 Plan establishes among other things required documentation for applications, site requirements, applicant qualifications, limits on awards, market studies, tenant considerations, design criteria, and financial underwriting standards; and establishes policies and procedures for administration of the federal Low Income Housing Tax Credit and the State Housing Tax Credit. Development of the plan includes a formal process of public input, which may shape the plan and its provisions.

The 2026 Plan integrates statutory requirements that among other things limit the State Housing Tax Credit, refine the allocation of State Ceiling to private activity bonds as related to multi-family housing developments, and provide requirements for establishment of uniform competitive criteria for awarding State Tax Credits and State Ceiling to promote highest value and greatest public benefit.

The State Housing Authority has included with the submission of the 2026 Plan a summary of substantive changes as compared to the 2025 Plan. Once the Plan has received Committee review and comment, it will be finalized and provided to the Governor for his approval and signature.

COMMITTEE ACTION:

Review and provide comment on the proposed 2026 Qualified Allocation Plan in accordance with the provisions of Section 12-6-3795(C)(3) of the SC Code of Laws.

ATTACHMENTS:

1. Letter dated November 10, 2025, of Mr. Richard A. Hutto, Executive Director, South Carolina State Housing Finance and Development Authority.
2. 2026 Qualified Allocation Plan - Summary of Changes.
3. 2026 Qualified Allocation Plan.



South Carolina State Housing Finance and Development Authority

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SCHousing.com

C. Todd Latiff  
Chairman

Richard A. Hutto  
Executive Director

November 10, 2025

Catherine Hart  
Director of Research  
Joint Bond Review Committee  
312 Gressette Senate Office Building  
Capitol Complex  
Columbia, SC 29201

**Re: Proposed 2026 Qualified Allocation Plan**

Dear Ms. Hart:

Enclosed you will find the proposed 2026 Qualified Allocation Plan ("2026 QAP"), recommended by South Carolina State Housing Finance and Development Authority, ("SC Housing") for review and comment of the Joint Bond Review Committee ("JBRC"). We respectfully request that this item be placed on JBRC's agenda for consideration at the December 2, 2025, meeting.

SC Housing received many comments during the period for public review and comment, which closed on October 29, 2025. The Agency welcomes the opportunity to receive feedback on the QAP's parameters, and strives to make a more sensible structure with every new round of allocations and in light of evolving needs in our state. Our agency has reviewed all public comments and incorporated them, where appropriate, following careful consideration. We are hopeful that our level of awareness, collaboration and the public's interest in our program will continue to lead to positive change – for the Agency and the state's citizens whom we serve.

The 2026 QAP was presented to the Program Committee of the Board of Commissioners of SC Housing on Wednesday, November 5, 2025, and will be presented for approval by the Board at the November 19, 2025, SC Housing Board Meeting. Following the review and comment by the JBRC, if no changes are made, SC Housing will deliver the proposed 2026 QAP to the Governor for final approval and execution.

Sincerely,

A handwritten signature in blue ink, appearing to read "R. Hutto", is placed above the printed name of the Executive Director.

Richard A. Hutto, CPA  
Executive Director

## 2026 Qualified Allocation Plan

### Changes Summary

This document is intended to support the review of the draft of the 2026 QAP by describing proposed substantive changes.

QAP	
<i>Same Market Area, pg. 12</i>	Defined the market area to .5-mile radius of a tax credit or TEB development awarded in the last 2 years funding cycles
<i>Targeting, pg. 13</i>	Add maximum number of 4 bedroom units to 5%
<i>Developer Fee, pg. 15</i>	Increased the developer fee
<i>Funding Sources, pg. 17</i>	Provided clarification eligible funding sources.
<i>Minimum Hard Costs, Pg. 19</i>	<ul style="list-style-type: none"> <li>Reduced the minimum hard cost ratio to 60%</li> <li>Added Tap and Impact Fees</li> </ul>
Appendix C1 – 9% LIHTC	
<i>Application, pg. 2</i>	Limited number of preliminary applications submitted by a development team
<i>Award Limitations, pg. 2</i>	<ul style="list-style-type: none"> <li>Updated the maximum amount of tax credit per development</li> <li>Revised the award limit per county</li> </ul>
<i>County Groups, Pg. 2 - 3</i>	Divided counties into 3 groupings – Urban, Suburban and Rural
<i>Set-Asides, pg. 3</i>	Added Rural New Construction set-aside
<i>Proximity to Amenities and Jobs; Rural Area, pg. 5-7</i>	<ul style="list-style-type: none"> <li>Increased the maximum points to 70</li> <li>Reduced points for grocery stores</li> <li>Provided clarification for Shopping, Healthcare and Retail amenities</li> <li>Limit single establishments to points for 2 categories</li> <li>Added a point for distance to public transportation</li> <li>Increased distance to five miles for Suburban counties and ten miles for Rural counties for job points</li> </ul>
<i>Affordable Housing Shortage, pg. 8</i>	Added points for counties not receiving a new construction award in the past 15 years.
<i>Project Based Rent Assistance pg. 9</i>	Removed this point item
<i>Other Types of Credits, pg. 9</i>	Added five points for receiving other types of credits
<i>Supportive Housing, pg. 9-10</i>	Clarified language on 20% AMI units
<i>Tie Breaker Criteria, pg. 10</i>	<ul style="list-style-type: none"> <li>Added the highest amount of funding per unit in the leveraging section</li> <li>Added requirement that the Concerted Community Revitalization Plan must be created within last ten years.</li> </ul>

<i>Evaluation of Rehabilitation Applications, pg. 11</i>	<ul style="list-style-type: none"> <li>• Changed point for previous submitted applications to years in extended use period</li> <li>• Added criteria for Concerted Community Revitalization Plan</li> </ul>
<b>Appendix C2- Tax-Exempt Bonds</b>	
<i>Application Process, pg. 2</i>	Added preliminary application
<i>Portfolio Transactions, pg. 2</i>	Increased the limit of developments in a portfolio transaction
<i>Application &amp; Award Limitations, pg. 3</i>	<ul style="list-style-type: none"> <li>• Limit number of preliminary applications</li> <li>• Increased award limit per county for urban counties</li> <li>• Listed the minimum request for ceiling allocation</li> </ul>
<i>Set-Asides, pg. 4</i>	Added New Construction, Rehab and Public Housing Authority set-asides
<i>Other Requirements, pg. 4</i>	Added notification regarding the Authority's Financial Advisor
<b>Tax Credit Manual</b>	
<i>10% Expenditure Test, pg. 2</i>	Increased deadline to 11 months after award
<i>Program Suspension &amp; Debarment, pg. 7-8</i>	<ul style="list-style-type: none"> <li>• Added penalty for developments whose carryforward allocation expires</li> <li>• Added penalty for developments who do not close by the deadline.</li> </ul>

# 2026 QUALIFIED ALLOCATION PLAN



South Carolina State Housing Finance  
and Development Authority

LOW-INCOME HOUSING TAX CREDIT PROGRAM

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## I. INTRODUCTION

The federal Low-Income Housing Tax Credit (the “LIHTC”), including the 4% LIHTC associated with tax-exempt bond financing, is governed by Section 42 of the Internal Revenue Code (the “Code”) and Treasury regulations at 26 CFR 1.42. South Carolina Code of Laws Section 12-6-3795, as amended, governs the state tax credit (“STC”).

The Authority, as the designated LIHTC agency for the state, is responsible for the adoption of a Qualified Allocation Plan (“QAP”). The Authority may post bulletins or public notices on its web page; applicants are responsible to check for updates.

Unless otherwise specified, all QAP and Appendix references to “application” refer to the full application.

## II. ADMINISTRATION OF THE QUALIFIED ALLOCATION PLAN

### A. Discretion

The Authority will make interpretations, apply criteria to facts and/or representations, and resolve all conflicts, inconsistencies, or ambiguities, if any, in the QAP or that arise in administering the LIHTC Program. Unless otherwise stated, the Authority is entitled to the full discretion allowed by law in making all such decisions. In the event of a natural disaster, disruption in the financial markets, or change in subsidy resources available, the Authority may disregard any section of the QAP, including point scoring and evaluation criteria, that interferes with an appropriate response. Applicants should seek guidance from the Authority regarding any situation not explicitly addressed in the QAP.

SC Housing will not accept waiver requests on any point scoring or ranking criteria.

### B. Information Requests

The Authority will honor Freedom of Information Act requests seeking any documents submitted with and/or related to LIHTC applications after reservation documents are executed and returned. The Authority will not notify the Applicant prior to complying with a request or prior to uploading the applications, or any portion thereof, to a web page.

### C. Opinions, Certifications and Exhibits

All opinions, certifications and exhibits must be based on an independent investigation into the facts and circumstances surrounding the proposed development. All opinions, certifications, and exhibits must be in the form specified by the Authority. Applications will be disqualified if an opinion, certification, or exhibit has been materially altered, amended, or changed.

All opinions and certifications submitted by attorneys, architects and/or engineers, and CPAs must be on letterhead with original signatures (scanned copies are acceptable).



## D. Third Party Professionals

Architects, engineers and CPAs must be independent third-party professionals and be licensed to practice their respective professions in South Carolina. Attorneys may be licensed to practice law in any state, but matters of South Carolina law may be opined upon only by South Carolina licensed attorneys.

## III. APPLICATION REVIEW AND RECONSIDERATION PROCESS

In computing the periods of time in this Section III, the date of the notification is not included in the calculation of days. Any intervening Saturday, Sunday or a State holiday, likewise, is/are not included in the calculation of days.

### A. Missing and/or Incomplete Documents

The Authority will notify Applicants in writing at preliminary application and full application of any

- missing and/or incomplete documents, and/or
- submitted documents requiring clarification.

The applicant must respond by 5:00 p.m. (Eastern) on the third business day.

Applicants may only provide documentation that existed at the time of the application deadline.

Documentation provided in response to Authority requests will not increase an application's point score.

### B. Disqualification and Scoring Review

1. The Authority may provide Applicants with three (3) business days to respond to a request for clarification. The applicant must respond by 5:00 p.m. (Eastern) on the third business day.

Responses to clarifications cannot modify an application or provide documentation that was not submitted as part of the original application.

2. The Authority will post full application point scores to its website and notify Applicants the full application point scores have been posted. Applicants have three (3) business days to respond to the point scores. The applicant must respond by 5:00 p.m. (EST) on the third business day.

The response must be limited to:

- the Applicants' opinions regarding the Authority's determinations;
- references to information submitted in the original application; and/or
- explanations of previously submitted documentation.

3. The Authority will notify Applicants in writing of proposed disqualifications. Applicants have three (3) business days to respond to the potential disqualification. The applicant must respond by 5:00 p.m. (EST) on the third business day.

The response must be limited to:

- the Applicants' opinions regarding the Authority's determinations;

- references to information submitted in the original application; and/or
- explanations of previously submitted documentation.

## C. Reconsideration Process

1. The process described in this section is the exclusive means by which an Applicant may request reconsideration of a disqualification and/or a point score. The Authority will not consider information submitted outside of these processes, whether in writing or otherwise. Applicants may request reconsideration only for applications in which they qualify as a member of the Development Team.
2. Applicants may request a reconsideration of a disqualification and/or a point score in writing via email to [reconsiderations@schousing.com](mailto:reconsiderations@schousing.com) by 5:00 p.m. (Eastern) within three (3) business days of the date of the disqualification and/or point score determination. The request will not be processed without receipt of the fee within the specified time frame.
3. The request must specifically identify the grounds for the reconsideration request using only the application, any materials provided under the process described in Section III(B), documents then existing in the Authority's file, and documentation explaining previous submissions. The burden of proof is on the Applicant to demonstrate any errors in the review and/or point scoring process.
4. The Authority's Legal Department will forward the reconsideration request, along with the Authority staff's response, to a Hearing/Review Officer to make a recommendation on the reconsideration request to the Review Committee. The Applicant and staff are copied on this correspondence. The Hearing/Review Officer may request additional information and/or conduct a meeting with the Applicant and Authority. Neither the Applicant nor Authority staff shall demand or request the Hearing/Review Officer to request additional information or conduct a meeting or conference regarding the reconsideration request. The Hearing/Review Officer does not represent any party.
5. In the event the Hearing/Review Officer recommends overturning the original decision, the Authority's Legal Department will provide the reconsideration request, staff's response, and the Hearing/Review Officer's recommendation to a Review Committee appointed by the Authority's Chairman of the Board of Commissioners. The Review Committee shall consist of at least three members, but may be more so long as the number of members of the Review Committee remains an odd number. The Review Committee shall not include any Development Division staff. The Review Committee may review any or all documents submitted to the Hearing/Review Officer, the Hearing/Review Officer's report and recommendation, documents from the application or the Authority's file, or may make independent inquiry into the matters concerning the reconsideration request. The Authority retains final decision-making authority on any reconsideration request, and the Review Committee's determination is the final decision of the Authority.
6. In the event the Hearing/Review Officer recommends upholding the original decision, the original decision is the final decision of the Authority. The Authority retains final decision-making authority on any reconsideration request.
7. No party may have ex parte communications with the Hearing/Review Officer regarding the reconsideration request or any related topic from the filing of the reconsideration request until the Authority renders its final determination. Ex parte communication includes, but is not limited to,
  - unsolicited communication with the Hearing/Review Officer, or
  - failing to copy the Authority in response to a request by the Hearing/Review Officer.

Any violation may result in disqualification of the pending application and suspension from participation in future funding cycle(s) for all of the development team members, regardless of which team member initiated the prohibited contact.

## **D. Final Scoring Decision**

Upon completion of the reconsideration process, the Authority will post final point scores to the Authority's website. If there is a tie between developments when final point scores are determined, the Authority will utilize the Tie Breaker Criteria outlined in this QAP to determine the development(s) to be awarded LIHTCs.

# **IV. THRESHOLD PARTICIPATION CRITERIA**

## **A. Required Documentation:**

Applications must include the following documentation.

### **1. MARKET STUDY**

A third-party independent market study, prepared by an Authority approved market analyst, adhering to the Authority's Market Study Guideline Procedures in Appendix A.

### **2. PERSONS WITH DISABILITIES**

A statement agreeing to abide by the following requirements.

The owner will not give a preference based on disability type (actual or perceived) or being a client of a particular service provider (absent approval from the Authority).

Neither the owner's partners/members nor the property management company may engage in medical, therapeutic, or other activities regulated by the U.S. Centers for Medicare & Medicaid Services with respect to the residents. The owner will:

- expressly include reasonable accommodation in the application for tenancy;
- not ask applicants/residents for medical or other protected information unless and only to the extent legally necessary (e.g., processing reasonable accommodations requests);
- use standard leases with the same rights available to, and responsibilities expected of, all households, including duration of tenancy (i.e., cannot be transitional); and
- ensure participation in any supportive services is entirely voluntary (not a formal or implied condition of occupancy).

### **3. AFFIRMATIVE FAIR HOUSING**

A statement agreeing to adopt and implement an Affirmative Fair Housing Marketing Plan, including outreach, marketing and advertising methods used to attract individuals on public housing waiting lists, prior to placing in service.

### **4. PHYSICAL NEEDS ASSESSMENT REPORT (PNA) FOR REHABILITATION**

An "As Is," pre-rehabilitation PNA prepared and certified by a third-party independent licensed engineer or architect in compliance with Appendix B. "Post-Rehab" PNAs and Property Condition Reports/Assessments do not qualify. The PNA must be dated not prior to 12 months before the application submission date. RD projects may submit the USDA/RD rehabilitation assessment.

As a condition of the award, the Authority will schedule an onsite inspection to discuss the proposed scope of work with the Applicant and third-party independent licensed engineer or architect.

## **5. RENT ROLL FOR REHABILITATION**

A current rent roll certified by the on-site property manager or a representative of the property management company for rehabilitation projects.

## **6. UTILITY ALLOWANCE SCHEDULE**

One of the following:

- a. RD Schedule for those developments financed by and receiving rental assistance from RD;
- b. the current allowance approved by HUD for those developments with 100% project based rental subsidies;
- c. the S.C. State Housing Finance and Development Authority's statewide utility allowance calculation;
- d. the Energy Star Statewide Utility Allowance for developments built to meet, at a minimum, the Version 3.0 Energy Star Certification (as per Exhibit G form), EarthCraft, LEED, or another Energy Star Certified Program;
- e. HUD Utility Schedule Model; or
- f. Engineered Energy Consumption Model completed by a properly licensed engineer or other qualified professional.

See Exhibit U for an example of a completed utility allowance schedule.

## **7. RELOCATION CERTIFICATION AND TENANT PROFILE FORM**

A detailed, step by step plan describing how any displaced persons will be relocated, including the costs. The Development Team is responsible for all relocation expenses. Rehabilitation projects must submit a FORM 3, Developer Relocation Certification and Tenant Profile Form.

## **B. Site Control, Ground Leases, and Scattered Sites**

1. An application must include one of the following documents executed by a Principal:
  - a. a recorded deed;
  - b. a purchase option (not options on other options) with date certain performance;
  - c. a purchase contract with date certain performance;
  - d. a ground lease or option on a ground lease either of which must not be for a term of less than fifty (50) years in term; or
  - e. a legally valid assignment of one of the above.

The Authority may require a quiet title action be completed prior to placing in service.

2. Projects intended to convert to homeownership after fifteen (15) years may not use land leases.
3. Related party ground leases are not allowed without prior approval from the Authority with the exception of local government or public housing authority. The acquisition cost will not be included

in the development and operations costs. In all cases the ground lessor must execute the Agreement as to Restrictive Covenant.

4. The application must include a copy of the current ownership as indicated in the local tax records.
5. Developments comprised of buildings located on noncontiguous parcels (scattered site) are ineligible for 9% LIHTCs.

## C. Zoning

Applications must include proof of proper zoning being in place at the time of application submission, including approval of all necessary special/conditional uses. A letter provided from the City/County official should verify that the proposed development site currently meets the local zoning or land use restrictions.

## D. Wetlands and Environmental

The full application must include:

1. A map regarding the presence or absence of wetlands, including non-jurisdictional wetlands. The Applicant must complete Exhibit W.
2. Phase I Environmental Site Assessment (ESA) report dated not more than six (6) months from the full application deadline.
  - a. The ESA will identify Historical, Controlled and Recognized Environmental Conditions (HRECS, CRECs, and RECs) that impact the suitability of the proposed site and must include the Environmental Professional's opinion on whether the proposed site requires further examination and the rationale used in making this determination. For proposals with existing buildings built before 1978, the report must also include the results from lead-based paint testing. For any HRECs identified, the ESA must demonstrate that previous efforts to mitigate the issue have been completed to the satisfaction of the applicable regulatory authority and/or that the site under consideration meets current criteria established by the regulatory authority and can be used without mandatory controls. For sites with identified CRECs, the ESA must indicate that the REC has been addressed to the standards and satisfaction of the overseeing regulatory authority and identify the remaining controls in place to mitigate the environmental condition(s).
  - b. If the Environmental Professional recommends further examination, the application must include a Phase II ESA. The Phase II ESA must provide a narrative of how any REC(s) identified will be mitigated using methods recognized and supported by the applicable regulatory authority and the estimated costs of such mitigation.
  - c. The report(s) must be prepared by a third-party, independent, licensed environmental professional as defined in 40 CFR § 312.10(b) and addressed to the Authority. The Environmental Professional cannot be a member or affiliate of the Development Team. The report(s) must be prepared in accordance with the American Society for Testing and Materials Practice Standards E-1527-13, or as amended.

## E. Applicant Qualification:

1. Applications must identify all members of the Development Team, which shall consist of the following:
  - Proposed Owner and its Principals
  - Developer and its Principals

For purposes of this section, Principals include any entity or individual that holds an ownership interest in the entity that has material control over the party identified. If the controlling entity includes a nonprofit entity, then Principals include all members making up such controlling entity.

All members of the Development Team must disclose all previous participation in the LIHTC program in any state.

2. No member of the Development Team may be suspended or debarred under Appendix E, Section VII.
3. The Development Team has an obligation at application submission and an ongoing obligation (including after award) to disclose all identities of interest on Exhibit P. An identity of interest means any relationship between any member of the Development Team and
  - the seller of the development site/property;
  - the general contractor or its subcontractors;
  - the lender; or
  - the syndicator.

The Authority may restrict the use of the related party and/or audit all expenditures within the ownership's entity structure.

## F. Required Development Experience

In order to participate in the LIHTC program, the proposed owner's general partner(s) or managing member(s) must have experience within the last ten (10) years in

- two (2) LIHTC projects in South Carolina; or
- four (4) LIHTC projects in other states.

Each project must have received its 8609s, placed in service, and reached stabilized occupancy. The general partner or managing member must have held a controlling stake from initial application through certificate of occupancy, as reflected on Exhibit K and related documentation.

The Authority may use other criteria as necessary to evaluate whether the Development Team has sufficient experience and capacity to successfully develop the project.

## G. Required Management Experience

1. The Application must identify the proposed management entity for the development at the time of full application and the Owner will be required to submit management entity's plan at the time of the 75% inspection request. The proposed management entity must have at least three (3) LIHTC developments in their current portfolio that it has successfully and continuously managed for the past three (3) years as reflected on Exhibit Y and related documentation.

Successfully managing means strict adherence to a detailed written management plan that addresses all of the following:

- a. separation of duties and adequate supervision of employees;
  - b. senior management oversight and review through internal audits;
  - c. staffing dedicated to compliance reviews of tenant eligibility and programmatic documentation;
  - d. approval process for evictions by consensus of senior or regional managers;
  - e. physical inspection policies (frequency, generation of work orders, lease violations for housekeeping or other noncompliant resident behaviors);
  - f. recordkeeping (including tenant certifications, annual owner certifications, HOME Rent Approvals, if applicable);
  - g. security of records containing personally identifiable and other protected information
  - h. marketing plan and marketing efforts;
  - i. reasonable accommodation plans and policies; and/or
  - j. procedures for addressing tenant complaints.
2. The Authority may notify a management company of being ineligible to be part of an awarded application. The reasons for ineligibility include low average occupancy rates, delays in returning vacant units to market ready condition, or other poor performance. If listed in a submitted or awarded application, the Applicant must find an eligible replacement.
  3. The lead contact person for the management entity must be certified as a LIHTC compliance specialist by an eligible organization, including: the National Association of Home Builders, Nan McKay, the National Affordable Housing Management Association, TheoPro Compliance & Consulting, Quadel Consulting, Spectrum Seminars, the National Center for Housing Management, Compliance Solutions (Zeffert & Co), Elizabeth Moreland Consulting, Novogradac & Company, Liz Bramlet Consulting, A.J. Johnson Consulting; and, Specialists in Housing Credit Management (SHCM), or any entity offering a functionally equivalent LIHTC certification.

## H. Required Capacity

The Authority will assess the financial capacity of the individuals and/or entities proposed as managing members or general partners based on their financial statements. The Authority will accept only financial statements audited, reviewed, or compiled by an independent CPA on or after December 31, 2024. Statements prepared on the income tax basis or cash basis must disclose that basis in the report. The Authority may request additional financial documentation as deemed appropriate by Authority Staff to determine financial capacity of the parties involved as part of the project review process.

The Authority may disqualify a Development Team due to insufficient overall capacity to undertake additional commitments including but not limited to failure to commence construction in a timely manner, meeting the 10% expenditure test without an extension, placing in service without an extension or exchange, having no projects with recaptured LIHTCs, and meeting other statutory completion deadlines.



## I. Appraisals

1. Applications must include a commercial real estate appraisal identifying the Authority as an authorized user, noting the Authority may rely on its representations.
  - a. The appraiser must be licensed by the South Carolina Real Estate Appraisers Board as a State Certified General Real Estate Appraiser (a temporary practice permit does not qualify). An appraiser in good standing with an active license in another state must obtain a reciprocal license with the South Carolina Real Estate Appraisers Board.
  - b. The appraisal must be completed by an appraiser listed on the SC Housing Approved Appraisers list.
  - c. The appraisal must be prepared in conformance with the Uniform Standards of Professional Appraisal Practice (USPAP).
  - d. Comparable properties must be located in the proposal's sub-market. If none exist, comparable properties must be located in the proposal's county or an adjacent county.

If a property's acquisition price exceeds the appraised value, the Authority will write down the purchase price to the appraised value. The Authority may hire another appraiser at the applicant's expense.

2. For new construction developments, the appraiser must value land using acreage as a measurement without regard to any contemplated improvements/restrictions. The value must be based on comparable land sales in the sub-market or the value of the "land only" portion of improved sales in the sub-market with common zoning characteristics. Such sales may not be exclusive to previous LIHTC developments.
3. For acquisition/rehabilitation developments, the appraisal must report "as is" land value and "as is" Fee Simple value, inclusive of land value. The Fee Simple As Is Value must provide both
  - as if market rents are in place, not considering the unique aspects of below-market financing, federal subsidies and/or LIHTCs in this value estimate, and
  - based on current restricted rents (not post rehab) taking into consideration the unique aspects of below-market financing, federal subsidies and/or LIHTCs in this value estimate.
4. For RD funded developments only, the appraisal must add together the values for "As-Is, Restricted Rents" and "Interest Credit Subsidy" to arrive at the appraised value. If the purchase price includes acquired reserves (cash), the reserves should be deducted from the purchase price before the comparison to appraised value.
5. The appraisal must disclose and quantify the valuation loss attributable to detrimental characteristic(s) in close proximity to the development being appraised.

## J. Mandatory Site Requirements

The Authority may reject a site based on information submitted in the application, site review findings, or other information.

1. At a minimum, the sites must comply with the following:
  - a. The surrounding area is residential or a mix of commercial uses appropriate to the targeted tenants; and



- b. Water and Sewer utility tie-ins are accessible and within 500 feet of the parcel line as verified by a letter from the City/County official or utility provider.
2. The following detrimental characteristics will result in an application being disqualified:
  - a. Proposing to subdivide an existing development into two (2) or more developments.
  - b. Proposing more than one new construction phase of the same project in the same funding cycle regardless of the tenant targeting. This includes, but is not limited to, subdividing a single parcel in the same funding cycle or proposals from the same or related members of the Development Team located adjacent to, in proximity to, or directly across the street from another proposed site.
  - c. Sites where the Authority determines the slope/terrain is not acceptable for affordable housing development as indicated by combined site and site preparation costs that exceed the cost of comparable existing buildable land in the area.
  - d. Any site listed on the National Priority List under the Comprehensive Environmental Response, Compensation, and Liability Act or that requires the execution of voluntary or involuntary cleanup agreements, with Department of Health and Environmental Control as noted in a Phase II environmental assessment report, unless the site has been determined appropriate for residential use and can be adequately mitigated to the standards and satisfaction of the Department of Health and Environmental Control. A mitigation plan must be submitted with the application, complete with an accurate estimate of costs and included in the development budget.
3. The Authority may disqualify new construction applications based on the following. Distances indicated are the shortest straight line between the boundary or property lines. The Authority may waive any of these disqualifications based on well documented extenuating circumstances presented no less than 30 days prior to preliminary application.
  - a. Sites where a nearby active railroad causes excessive noise and vibration. The application should include a map showing the distance to any railroad tracks within 1,000 feet. Demonstrating an acceptable noise level, as defined by HUD, can be the basis for waiver.
  - b. Sites within 2,500 feet of a civil airport or 15,000 feet of a military airfield if the site is located within the Runway Clearzone or Protection Zone (civilian and military airports) or Accident Potential Zone (military airports);
  - c. Sites within one-quarter (1/4) mile of the following:
    - an operating commercial beef/hog/chicken/turkey farm or processing plant;
    - a treatment, storage, or disposal facility for hazardous wastes, an active or inactive solid waste disposal facility and/or solid waste transfer facility; or
    - a sewage treatment plant;
  - d. Sites within 500 feet of the following:
    - commercial junkyard or salvage yard; trash heap, dump pile, or other eyesore;
    - above ground commercial bulk storage (any one tank over 1,500 gallons or multiple tanks exceeding 1,500 gallons total) or distribution facilities for propane/butane gas, hazardous chemical or petroleum/gasoline;
    - adult video/entertainment clubs and stores; or
    - operating industrial facility, including but not limited to steel manufacturers, oil refineries, ports, chemical plants, plastic manufacturers, automotive and engine parts manufacturers, food processing plants.

Considerations for granting a waiver for a manufacturing facility include: potential employment; other residential properties in the immediate area; size and product type.

## **K. City/County/Legislative Notification:**

The applicant must provide signed notification letter(s) addressed to the following:

- the highest official of the locality (i.e. Mayor or County Administrator),
- the State Representative and State Senator of the district in which the development is to be located, and
- each City/County Council member.

The Authority will deliver the letters.

A form notification letter will be available on the Authority's website and must include the following:

1. The proposed Owner's name, phone number, and mailing address.
2. Development information
  - project type (rehabilitation, new construction, or adaptive reuse);
  - number of units;
  - acreage of proposed site;
  - target population (family or elderly); and
  - address of proposed site.
3. The property is applying for LIHTCs and STCs.

## **L. Market Requirements**

Proposed developments must be economically viable as justified by the market study findings and meet the following requirements:

### **1. CAPTURE RATE**

All developments must have a capture rate at or below 30%.

### **2. ABSORPTION/LEASE-UP PERIODS**

Developments must have absorption/lease-up periods of 12 months or less.

### **3. SAME MARKET AREA**

- a. New Construction applications may not be for the same tenant populations within a one-half mile radius of existing new construction Authority funded developments funded in the previous two (2) tax credit and tax -exempt bond application cycles. The distance will be the shortest straight line between the boundary lines of the sites.
- b. The analyst must reach a specific conclusion regarding whether the proposal would cause a lease-up or occupancy problem for any existing or awarded (not yet built) LIHTC project in the primary market area.

## M. Targeting, Public Housing Agency Waiting Lists, and Average Income

1. The Application must state whether the development will target families or older persons as described below.
  - a. **Family Development:** For new construction developments,
    - the number of units with three (3) or four (4) bedrooms must be between twenty percent (20%) and thirty-five percent (35%) of the total property unit count. The maximum number of four (4) bedroom units may not exceed five percent (5%) of the total number of units; and
    - at least ten percent (10%) must be one (1) bedroom, studio, or single room occupancy.
  - b. **Older Person Development:** All new construction developments are limited to studios, one (1) bedroom or two (2) bedroom units and must be accessible by elevator for all floors above ground level.
2. All developments must serve individuals on Public Housing agency waitlists. After award, the Owner must send a letter to the PHA confirming it intends to serve individuals on the PHA waiting lists.
3. Applications awarded 2026 may utilize the average income minimum set-aside. Projects utilizing the average income set-aside may not
  - contain market-rate units,
  - propose average designations exceeding 60% of area median income (AMI) for any bedroom type (pro-rata distribution), or
  - change a unit designation without Authority approval.

The Authority may waive the foregoing, if necessary, for a rehabilitation application to better fit the household incomes of in-place tenants.

For projects with more than one building, owners must select that each building is part of a multiple building set-aside on the IRS Form(s) 8609.

## N. Mandatory Design Criteria

Projects must comply with the applicable minimum design requirements, in Appendix B. The applicant must request any waiver of the mandatory design criteria specified in the QAP and Appendix B no later than 30 days prior to the full application submission deadline.

## O. Rehabilitation

1. The PNA for rehabilitation projects must show a minimum of \$50,000 per unit in hard construction costs, excluding major systems that have been replaced within the past seven (7) years. At least \$25,000 must be attributed to the interior of the units.
2. Buildings in senior projects with units entirely on floors above the ground level must install elevators. The application must support the costs reflected in the application.
3. No more than ten percent (10%) of the existing tenants may be permanently displaced and any such displacement must have advance approval from the Authority.
4. All buildings must be at least fifteen (15) years old and not be deteriorated to the point of requiring demolition.

## P. Financial Underwriting

### Basic Financial Feasibility Review:

- In determining financial feasibility, the Authority will disregard all personal or other guarantees that are required to supply deficiencies in income necessary to pay debt service and operating expenses of the development. Developments that are not financially feasible without such guarantees will not be offered a LIHTC award.
- The Authority will disqualify developments it determines are not financially feasible or do not need LIHTCs.
- To receive an allocation, the Authority must underwrite a development to determine the least amount of LIHTC necessary to be financially feasible.
- The Authority will apply all financial underwriting standards to all developments from the application submission through the issuance of 8609s.

### 1. Development Costs

- a. The Authority will
  - determine which new construction projects show development budget amounts outside the standard deviation, and
  - require all such applicants to provide explanations.

Inability to explain the costs may result in a reduction of tax credits awarded or a disqualification of the application.
- b. The Authority will evaluate development costs and may adjust costs for reasonableness, necessity, and eligibility or disqualify applications not reflecting an efficient use of federal and/or state LIHTCs.

### 2. Reserve Requirements

- a. **Operating Reserves**

Must be funded at or before the final equity installment, maintained throughout the compliance period, and remain with the property at the time of the investor exit. Corporate Ownership Documents do not supersede this requirement unless the Reserve has been approved by the Authority.

  - i. Developments must establish and maintain a six (6) month minimum or nine (9) month maximum of annual:
    - Projected operating expenses (includes all line items on the Tax Credit Applications Tab 7 Annual Expense section);
    - Replacement Reserves (the greater of Authority minimum per unit and a higher amount required by syndicator and/or lender as mentioned below); and
    - Must-pay debt service
  - ii. Operating Reserves for USDA/RD applicants: This requirement can be met by establishing and maintaining the RD-required reserve. If applicable, documentation from RD staff demonstrating the RD-required reserve calculation is required at PIS application submission.

b. **Replacement Reserves**

Developments must establish and maintain a replacement reserve throughout the compliance period of \$300 per unit annually.

- i. Additional reserves may be allowed up to \$450 per unit annually, only if required by a syndicator and/or lender, and verified in the syndicator's or lender's letter of intent.
- ii. Replacement reserves must be itemized in the development's annual audited financial statements.
- iii. Replacement reserves must be funded with annual deposits from operational cash flow during the initial twenty (20) years. Lump sum (i.e. pre-funded) replacement reserves itemized in total development costs (TDC) are not allowed. Such pre-funded replacement reserves will be removed from TDC during financial feasibility underwriting regardless if deemed eligible or ineligible basis costs.
- iv. Replacement Reserves for USDA/RD applicants - This requirement can be met by establishing and maintaining the RD-required replacement reserves. If applicable, documentation from RD staff demonstrating the RD-required reserve calculation is required at PIS application submission.

c. **Other Reserves**

Other Reserves/Reserve accounts (i.e., interest, transitional, Section 8, working capital, MIP, rent up, etc.), are not allowed in TDC at placed in service application submission unless:

- i. The total amount of the Other Reserve is identified within the full application submission TDC and includes a descriptive calculation on how such Other Reserve was determined; and
- ii. The Authority provides pre-approval of the Other Reserve in writing after full application underwriting is completed.

For any pre-approved Other Reserves, Corporate Ownership Documents must include the following provision: Funds remaining in the reserve at the end of the compliance period or sale of the property, whichever is earlier, must be used to reduce outstanding debt on the development."

Submission of a full application indicates an applicant has acknowledged, understood, and agreed with the requirements in 2a-2c above.

3. **Maximum Developer Fees, Developer Overhead, and Consultant Fees (the "Fees")**

The Fees will be calculated to be the lesser of:

- a. Fifteen percent (15%) of Total Development Costs less Land, Project Consultant Fees, Developer Fees, Developer Overhead, Other Developer Costs and Reserves, or
- b. a cumulative amount of
  - \$30,000 per unit for the first 50 units
  - \$25,000 per unit for units 51 - 100
  - \$20,000 per unit for any units more than 100

4. **Deferred Developer Fee**

- a. Developer fees can be deferred to cover a gap in funding sources when all of the following conditions are met:

- i. The entire amount will be paid pursuant to the standards required by the Code to stay in basis.
  - ii. The deferred portion does not exceed fifty percent (50%) of the total at full application submission. This limitation will not apply when the Placed-in-Service application is submitted if a greater deferral of developer fee is necessary for project feasibility.
  - iii. Payment projections do not jeopardize operations.
  - iv. The application includes a statement describing the terms of the deferred repayment obligation, any interest rate charged, and the source of repayment.
- b. Nonprofit organizations must include a resolution from their Board of Directors authorizing a deferred payment obligation from the development.
  - c. The submitted cost certification must include a Note evidencing the principal amount and terms of repayment of any deferred repayment obligation.

**5. Contractor Cost Limits and Cost Certification**

The combined total of Contractor Profit, Overhead, and General Requirements (the “Contractor Fees”) shall be limited to fourteen percent (14%) of Hard Construction Costs, of which 6% is contractor profit, 2% is overhead and 6% is general requirements. For new construction developments, the contractor contingency may not exceed five percent (5%) of hard construction costs. For rehabilitation and adaptive reuse developments, the contractor contingency may not exceed ten percent (10%) of hard construction costs.

Hard Construction Costs are the following line items on the Development Costs budget in the Application:

- On Site Improvement
- Off Site Improvement
- Demolition
- Improvements
- New Construction
- Rehabilitation
- Accessory Structures
- Other Hard Construction Costs
- Furniture, Fixtures, & Equipment

**6. Annual Operating Expenses**

All applications must submit projected annual operating expenses between \$3,500 and \$6,000 per unit per year, excluding reserves, property taxes, insurance, and the annual compliance monitoring fees. The Authority may consider waivers on this operating expense range if special circumstances apply.

Placed-in service applications may utilize the annual operating expense range represented in the QAP that is current at the time that the placed-in-service application is submitted to the Authority.

**7. Debt Coverage Ratio**

The development’s first year DCR must be within the range of 1.15 to 1.45. A proposed development may exceed the maximum for financial feasibility purposes. In the event the DCR is greater than 1.45, the Authority may increase debt or “impute debt” based on the conventional primary loan terms stated in the application to calculate the maximum annual tax credit amount allowed.

The Authority will waive the 1.45 maximum if the initial projected annual Cash Flow/Unit does not exceed one thousand one hundred dollars (\$1,100).

The pro-forma must demonstrate maintaining not less than a 1.0 DCR throughout the first 20 years of operations.

**8. Expense Coverage Ratio**

For developments without repayable debt, the initial Expense Coverage Ratio must be a minimum of 1.10 and the initial projected annual cash flow per unit may not exceed \$1,100.

**9. Funding Sources**

**Soft Loans, Seller Notes, and Subordinate Debt**

Applications that include soft loans, seller notes, subordinate debt, or other instruments payable from project cash flow must provide:

- A complete description of the terms, repayment schedule, and priority relative to other debt; and
- Documentation demonstrating a reasonable expectation of repayment.

Cash flow-only repayment obligations (excluding Federal funds, RAD funding, etc) that do not demonstrate clear repayment feasibility may be discounted or excluded from eligible funding sources at the Agency's discretion.

**Reinvestment Income**

Reinvestment income may be recognized as a funding source for 4% Tax-Exempt Bond developments only if all of the following conditions are met:

- Income is generated from bond proceeds held in trustee-controlled accounts (e.g., Guaranteed Investment Contracts, U.S. Treasury obligations, or other approved fixed-rate investments);
- Investments are fixed-rate, fully secured, and non-variable; and
- Documentation of projected reinvestment income is provided with the application, with final certification from a CPA, trustee, or rating agency submitted at or prior to bond closing.

Variable, speculative, or uncommitted investment income will not be recognized as a funding source.

**Cap on Reinvestment Income**

Recognized reinvestment income will be capped at no more than 50% of the total Developer Fee, and this cap will apply separately from any Deferred Developer Fee allowance.

**Other Tax Credits**

If the development is eligible for additional types of tax credits, the application must demonstrate the calculation of equity generated by each credit type. This documentation must include:

- Annual credit amount;
- Syndication factor;
- Ownership percentage;
- Total equity; and
- Any other variables used to determine the equity generated.

**Prohibited Sources**

Income generated by the property during the construction or rent-up period may not be used as a funding source.

**10. Permanent Financing**

- a. Applications must include a letter of intent for all permanent financing sources. The Authority will underwrite debt from a bank or other private sector lender at the interest rate determined based on a survey of lenders. The letter must clearly state:
  - i. the term;
  - ii. the amortization period;
  - iii. how the interest rate will be indexed;
  - iv. the current rate at the time of the letter;
  - v. the anticipated principal amount of the loan; and
  - vi. the lien position.
- b. All permanent loans must have a term of at least fifteen (15) years. No balloon payment may be due prior to fifteen (15) years after conversion to permanent. All permanent loans must amortize so that debt service is paid in equal installments over a period between thirty (30) and forty (40) years (fifty (50) years for RD properties).

**11. Annual Rent, Expense Trends and Vacancy Rates**

The Authority will increase rents two percent (2%) annually and operating expenses three percent (3%) annually. The vacancy rate will be the greater of seven percent (7%) or as represented in the market study.

For rehabilitation developments with project based rental assistance on at least fifty percent (50%) of the total units, the Authority will consider allowing a five percent (5%) vacancy rate if the development can demonstrate a history of lower vacancy rates for an extended period of time.

For new construction developments with project based rental assistance on at least seventy-five percent (75%) of the total units, the Authority will allow a five percent (5%) vacancy rate.

The applicant must request the five percent (5%) vacancy rate and provide justification. The Authority will make the final determination of whether to utilize a five percent (5%) vacancy rate for underwriting.

**12. Other Income**

Application must clearly specify any projected income from services or charges other than monthly rental of units. Other Income projections may not exceed three percent (3%) of the total potential annual rent.

**13. Brokering / Reselling of Services to Tenants**

Applications may not include revenue and expenses resulting from acting as a broker or reseller of services to tenants.



#### **14. Minimum Hard Cost Requirement**

Applications must reflect a minimum hard cost ratio of not less than sixty percent (60%) of total development costs at full application and PIS application unless specifically waived at initial application.

Hard Costs are the following line items on the Development Costs budget in the Application:

- Land
- Existing Structure
- Other (Land & Buildings)
- On Site Improvement
- Off Site Improvement
- Demolition
- Improvements
- New Construction
- Rehabilitation
- Accessory Structures
- Other Hard Construction Costs
- Furniture, Fixtures, & Equipment
- Contractor Contingency
- Tap Fees & Impact Fees

#### **15. Rent Allowances for Project Based Rental Developments**

At full application, acquisition/rehabilitation developments with existing HUD approved Housing Assistance Payments (HAP) contracts/NOF or RD approved rental assistance contracts may propose rents higher than the current approved contract rents if:

- the third party market study submitted in the application package supports the higher rents;
- a copy of the approved rent schedule currently in effect is also submitted; and
- a copy of the pre-development/rehabilitation Rent Comparability Study, if performed before the full application deadline, is submitted.

For new construction applications, evidence that an application for rental assistance has been submitted and received by the appropriate federal agency; or a copy of the approved contract/NOF if one exists.

The placed in service application must include copies of:

- the current contract/NOF from the appropriate federal agency;
- the post-development/rehabilitation Rent Comparability Study; and
- the approved rent adjustment document in effect on the placed in service date.

#### **16. Syndication Information**

The Authority will underwrite federal and state LIHTC investment using syndication rates determined based on a survey of equity providers and will post the results for 9% applications no later than 60 days before the full application deadline and for TEB applications no later than 60 days before the preliminary application.

#### **17. Ground Leases**

The Authority will underwrite debt related to the lease at the lesser of its actual terms or the annual debt service produced by amortizing the appraised value of the land at the same rate and terms as the permanent loan over a term of 50 years. The DCR rules in this QAP will apply.

## **V. POST AWARD AND 4% LIHTC POLICIES AND PROCEDURES**

The policies and procedures applicable to projects awarded in the competitive funding cycle and to 4% LIHTC applications and awards are set forth in the Appendix E, the LIHTC Manual.

## **VI. AMENDMENTS**

The Authority may amend this QAP as needed. All amendments shall be fully effective and incorporated herein immediately.

# APPENDIX A

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# MARKET STUDY CRITERIA

## A. Market Study Process:

1. An electronic copy of the market study must be submitted with the Tax Credit Application.
2. Upon receipt of the application, the Authority will forward a copy of the market study to the Authority's third party market analyst.
3. The Authority's third party market analyst will notify the applicant and the market analyst that prepared the market study via email of any deficiencies. All issues must be resolved to the satisfaction of the Authority's market analyst and Authority staff. The Authority is not bound by the conclusions or recommendations of the applicant's market study submitted and may disqualify any application if it determines an acceptable market does not exist.

## B. Requirements:

1. Applicants must use an Authority approved market analyst to complete market studies.
2. All market analysts must adhere to the National Council of Housing Market Analysts' Market Study Terminology list available at: [www.housingonline.com/Resources.aspx](http://www.housingonline.com/Resources.aspx).
3. The market study must include complete Exhibit S-2 form, S-2 Calculation sheet, and the table provided in the S-2 Worksheet. Submitted market studies must conform to Exhibit S-2.
4. The market study should reflect conclusions based on the proposed development, including capture rates, absorption periods, and market advantage.
5. The Applicant's market analyst must indicate within the conclusion and recommendations section a conclusion regarding the ability of the market area to support the proposed development, the depth of the rental market, and whether the proposed development will have a negative long-term impact on existing rental communities.

### 6. Project Description

This section must include the following information, as provided by the LIHTC Applicant:

- a. Development Location;
- b. Construction Type: New Construction, Rehab, Acquisition and Rehab, Adaptive Reuse;
- c. Occupancy Type: Family, Older Persons;
- d. Target Income Group: e.g., 30% AMI, 50% AMI, 60% AMI, Market Rate;
- e. Special Needs Population (if applicable);
- f. Number of units by bedroom/bathroom;
- g. Number of buildings and stories and if there will be an elevator;
- h. Unit Size(s);
- i. Structure Type/Design: Townhouse, Garden Apartment;
- j. Proposed Rents and Utility Allowances including energy source (Gas, Oil, Electric) and if utility is Tenant or Owner's responsibility;
- k. Status of Project Based Rental Assistance: None, Existing, Proposed;
- l. Proposed Development Amenities;
- m. Proposed Unit Amenities; and

- n. For rehab proposals, current occupancy levels, current rents being charged (versus proposed rents), tenant incomes, as well as detailed information about the scope of work planned and how the rehabilitation will be carried out.

## **7. Site Description**

This section must:

- a. Include the date(s) the senior analyst/market study author visited the site and surrounding market area developments.
- b. Describe physical features of the site, adjacent parcels, surrounding structures and neighborhoods. Give a brief description of the surrounding land uses. Note any obvious environmental concerns or any other visible detrimental characteristics that are either next to or in close proximity to the site that could be considered detrimental, harmful or have a possible damaging effect on the site.
- b. Give the site's general physical location to surrounding roads, public transportation, community amenities, employment, and services. Identify the closest shopping areas, schools, and employment centers, medical facilities and other amenities that would be important to the targeted population.
- c. Indicate if there are any road or infrastructure improvements planned or under construction in the proposed market area;
- d. Provide information or statistics as well as local perceptions of crime in the neighborhood, if applicable.
- e. Comment on access, ingress/egress, and visibility to site.
- f. Describe overall positive and negative attributes about the site as they relate to marketability.

## **8. Market Area**

- a. A map of the Primary Market Area (PMA) including the subject site. Identify boundaries by census tracts, jurisdictions, street names, or other geography forming the boundaries. Define the larger geographic area in which the PMA is located (i.e. city, county, MSA).
- b. A physical description of the PMA including the methodology used to define it.
- c. A detailed narrative that includes market specific language rather than a list of generic concepts or factors considered. The narrative must also:
  - explain how the market area was determined; and
  - discuss whether prospective tenants within the PMA will be able to afford the Pro Forma rents and if they cannot provide further comments on where eligible demand will come from.
- d. Identify the borders of the market area and approximate distance from the subject property/site.
- e. Census tracts that encompass the PMA.
- f. The analyst may provide information about the secondary market area, however demand should be based solely on the PMA.

## **9. Market Area Economy**

- a. A map of the site as compared to the locations of major employment concentrations.
- b. Employment by industry--numbers and percentages (i.e. Manufacturing: 150,000 (20%)).
- c. The major current employers and anticipated expansions, contractions in their workforces, as well as newly planned employers and their impact on employment in the market area.
- d. Total workforce figures and employment and unemployment trends for the county and, where possible, the PMA. Provide numbers and percentages for both. Provide annualized figures for these trends (i.e. average annual increase of unemployment of 1.2%).

- e. If relevant, comment on the availability of housing for low- to very low-income employees of businesses and industries that draw from the PMA.
- f. Provide commuting patterns for workers such as how many workers in the PMA commute from surrounding areas outside the PMA.

#### 10. Community Demographic Data

Provide the following demographic information for the market area, giving historical data as well as current data and estimates. Include data on population and household trends from 2010 to current year and projected to the placed-in-service year. Historical 2000 Census data can also be included to provide further insight into the historical demographic trends but is not required. Projections must be prepared by a reputable source such as Nielsen, ESRI, or Ribbon Demographics. U.S. Census data prior to the 2010 Census is only acceptable as historical data. If the Market Analyst does not agree with these projections, s/he must provide the reasoning, along with substitute projections. Both numbers and percentages should be shown for the data below. Annualized growth figures should be included. Please include a brief narrative of overall conclusions.

- a. Population Trends
  - Total Population;
  - Population by age groups;
  - Number of older persons (for older persons projects); and
  - If a special population is proposed for the development (e.g., homeless), provide additional information on population growth patterns specifically related to this population.
- b. Household Trends
  - Total number of households, average household size, and group quarter;
  - Households by tenure (If appropriate, breakout by older persons and non-older persons);
  - Households by income. (Older person(s) proposals should reflect the income distribution of those households only); and
  - Renter households by number of persons in the household.

#### 11. Project-Specific Demand Analysis

- a. Income Restrictions: Use the applicable incomes and rents in the subject's application. Analysts must take the income restrictions designated in the application into account when estimating demand.
- b. Affordability: Analysts must assume that no family households are able to pay more than 35% of gross income towards gross rent and no elderly households are able to pay more than 40% of their gross income toward gross rent. Any such additional indicators should be calculated separately and be easily added or subtracted from the required demand analysis.
- c. Demand: The demand analysis should clearly indicate the minimum and maximum income range for each targeted group. In cases where the proposed rents for projects with Project Based Rental Assistance are higher than the maximum allowable LIHTC rents, the demand analyses must show with the rental assistance (thereby allowing \$0 for the minimum income) and without. For the second demand calculation without rental assistance, analysts should use LIHTC rents regardless of market conditions. For projects with market rate units, the analyst must make some reasonable determination of a maximum income level beyond which a household would not likely be a participant in the rental market. The analyst should clearly state the assumptions used in making the aforementioned determination.

The demand should be derived from the following sources using data established from a reputable source:

- Demand from New Renter Households: New rental units required in the market area due to projected renter household growth. Determinations must be made using the current year as the base year and projecting forward to the anticipated placed-in-service date. The household projections must be limited to the age and income cohort and the demand for each income group targeted (i.e. 50% of median income) must be shown separately.
- In instances where more than 20% of proposed rental units are comprised of three-bedroom units or larger, analysts must also conduct an additional refined large-household capture rate analysis by considering the number of large households (three-persons and larger).
- Demand from Existing Households: The second source of demand should be determined using 2010 census data or the most current American Community Survey (ACS) data and projected from:
- Rent over-burdened households, if any, within the age group, income cohort and tenure targeted for the proposed development. Analysts should assume that the rent-overburdened analysis includes households paying greater than 35% or in the case of elderly 40% of their gross income toward gross rent rather than some greater percentage.
- Households living in substandard housing. Households in substandard housing should be adjusted for age, income bands and tenure that apply. The analyst should be conservative and use their own knowledge of the market area and project to determine if households from substandard housing would be a realistic source of demand.
- Elderly Homeowners likely to convert to rentership: A narrative of the steps taken to arrive at this demand figure should be included. The elderly homeowner conversion demand component shall not account for more than 20% of the total demand.
- The analyst may also use other indicators to estimate demand (such as household turnover rates) if fully justified (e.g., an analysis of an under-built or over-built market in the base year). Any such additional indicators should be calculated separately and be easily added or subtracted from the demand analysis described above.

d. Method:

- Demand: The two overall demand components added together 11a and 11b above represent demand for the project.
- Supply: Comparable/competitive units funded, under construction, or placed in service since 2024 must be subtracted to calculate net demand. Vacancies incomparable/competitive projects placed in service which have not reached stabilized occupancy (93%) must also be considered as part of the supply.
- Capture rates: Capture rates must be calculated for each targeted income group and each bedroom size proposed as well as for the project overall.
- Absorption rates: The absorption rate determination should consider such factors as the overall estimate of new renter household growth, the available supply of comparable/competitive units, observed trends in absorption of comparable/competitive units, and the availability of subsidies and rent specials.

e. Supply Analysis (Comparable/Competitive Rental Developments):

The senior analyst/market study author must visit all

- LIHTC;

- Bond;
- USDA;
- HUD;
- small rental with units at similar income targets, rent levels and targeted age cohorts;
- other projects that would compete with or be affected by the proposed project; and
- developments now existing, under construction, and/or in the pipeline.

The following information should be included for each comparable/competitive development:

- Name, Address, and Phone Number;
- Contact Person's Name and phone number of the comparable/competitive property development;
- Photograph;
- Monthly Rents and utilities included in the rent, if any;
- Type of development (RD, LIHTC, conventional, Bond with LIHTCs, small rental development);
- Breakdown of unit sizes by bedroom/bathroom count;
- Square footage for each comparable/competitive unit type;
- Project age and Condition;
- Population Served;
- Description of unit amenities (include kitchen equipment) and site amenities;
- Concessions given, if any;
- Current vacancy rates broken down by bedroom size. Vacancy rates are to be determined using the most current information provided by property management.
- Waiting list information, if any;
- Number of units receiving rental assistance, description of assistance as project or tenant based;
- For developments in the planning or construction stages, provide the name, address/location, name of owner, number of units, unit configuration, rent structure, estimated date of market entry, and any other relevant market analysis information. If there are no developments in the planning stages or under construction, a statement to that effect must be provided; and
- If the proposed project is an additional phase of an existing project, include a tenant profile as well as any information about a waiting list.

The above information should be provided in a comparative framework including the proposed project and those projects under construction and/or in the pipeline. For example, in addition to providing a page of information along with a picture for each comparable/competitive development, the analyst should also provide comparative charts that show such factors as the proposed project's rents, square footages, amenities, etc. as compared to the other projects.

A map showing the comparable/competitive developments in relation to the proposed site. The map should have an identifiable usable scale.

If applicable to the proposed development, provide data on three and four bedroom single-family rentals or provide information on rental trailer homes and single family homes in rural areas lacking sufficient three and four bedroom rental units to identify where potential tenants are currently living.



Derive the market rent and compare them to the proposed development's rents. Quantify and discuss market advantage of the subject and impact on marketability. Market advantages should be provided for each unit type and the project overall.

Calculate the overall market vacancy rate, the overall comparable/competitive vacancy rate, and the overall vacancy rate for all LIHTC, Bond, small rental development projects in the market area. (Do not include new projects in the process of "renting up" in vacancy rate.)

The cost and availability of homeownership and mobile home living, if applicable.

Conclusion as to the immediate and long term impact that the proposed project will have on the occupancy of comparable rental communities in the PMA, specifically other LIHTC communities.

**7. Interviews**

The results of formal or informal interviews with property managers, town planning officials or anyone with relevant information relating to the overall demand for the proposed development should be summarized in this section. Include the name and phone number of the person with whom you talked.

**8. Recommendations**

Market Analysts must provide a recommendation that clearly states whether a proposed project should be approved as proposed. The Market Analyst must provide a brief summary of all the major factors that led to their conclusion.

## **C. Signed Statement Requirements:**

The signed statement must include the following language:

I affirm that I have made a physical inspection of the market and surrounding area and the information obtained in the field has been used to determine the need and demand for LIHTC units. I understand that any misrepresentation of this statement may result in the denial of further participation in the South Carolina State Housing Finance & Development Authority's programs. I also affirm that I have no financial interest in the project or current business relationship with the ownership entity and my compensation is not contingent on any project being funded. This report was written according to the SCSHFDA's market study requirements. The information included is accurate and can be relied upon by SCSHFDA to present a true assessment of the low-income housing rental market.

# APPENDIX B

## DEVELOPMENT DESIGN CRITERIA

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The terms of these mandatory design criteria are the minimum requirements for any project awarded LIHTCs. Required documents must be prepared by engineers and architects licensed to do business in South Carolina.

Owners must submit a full size (24" x 36") electronic version of the final plans and specifications and receive approval before commencing site work or construction. At all times after award, the owner is responsible for promptly informing the Authority of any changes or alterations which deviate from the final plans and specifications approved by the Authority. The owners must not take action on any material change, the site layout, floor plan, elevations or amenities without a completed change order approved by the Authority. This includes changes required by local governments to receive building permits.

Nothing in this Appendix shall be construed to modify or eliminate any legally imposed requirement, including those governing accessibility.

## I. DESIGN DOCUMENT STANDARDS

### A. Code Compliance

Construction must be in compliance with all federal, state, county, city, local and governing jurisdictions codes, in addition to:

1. Fair Housing Act.
2. Section 504.
3. HUD Housing Quality Standards (HQS).
4. HUD Minimum Property Standards (MPS).
5. HUD Uniform Physical Condition Standards (UPCS).

These code standards are not meant to replace Federal, State or local codes.

### B. Application Plan Requirements

Plans must be submitted in electronic via the application system.

1. Site & Civil plans, four pages minimum, using a scale of 1" = 30' or 40' with a north arrow that include:
  - a. Phased site plan.
  - b. Vicinity map.
  - c. Street name(s) where site access is made.
  - d. Site acreage with Tax map #s.
  - e. Flood plains and wetlands as determined by qualified wetlands professional
  - f. Site zoning restrictions including but not limited to: setback, utility easements, ingress/egress easements, right of ways and boundary lines.
  - g. Existing topographic elevations and proposed elevations.
  - h. Location of existing and any proposed changes to existing structures, buildings, roadways and parking areas.

- i. Finished floor elevations for all buildings.
  - j. Building(s) layout with locations of proposed specialty units including but not limited to handicapped and sensory impaired locations.
  - k. Site features such as community building, playground, picnic shelter, gazebo, walking trails, refuse collection area, postal facilities and site entrance signage.
  - l. Planed roads and parking areas with parking spaces clearly depicted.
  - m. Retaining walls.
  - n. Current underground utilities, including but not limited to: sanitary sewer, water, gas, electric, cable, internet and telephone if available.
  - o. Storm water detention, detention pond, underground detention, storm water/detention easement.
  - p. All proposed fencing.
  - q. Location of any proposed/new utility easements, ingress/egress easements and right of ways.
2. Architectural plans that include:
- a. Front, rear and side elevations of all building types and identify all materials to be used on building (s) exterior using a scale of  $1/8'' = 1'$ .
  - b. Building plans using a scale of  $1/8''$  or  $1/4'' = 1'$ .
  - c. Building plans to include total square footage and heated total square footage.
  - d. Dimensioned floor plans for all unit types using a scale of  $1/4'' = 1'$  that include heated square footage, total square footage and individual room square footage. Plans must include furniture and equipment layouts.
  - e. Dimensioned floor plans for all Community Buildings or Rooms, Site Amenities and Facilities using a scale of  $1/4'' = 1'$  that include heated square footage, total square footage and individual room square footage. Plans must include the furniture and equipment layout.
  - f. For projects involving renovation and/or demolition of existing structures, proposed changes to building components and design shown in redline and also describe removal and new construction methods.
  - g. For projects involving removal of asbestos and/or lead based paint removal, general notes identifying location and procedures for removal.

## C. Final Plan and Specification Requirements

No later than twelve (12) months after the Reservation Date, all awarded projects must submit a full set of completed Plans, Specifications and Geotechnical Soil Reports that include all application plan requirements, any changes from the application plan submittal, and the following:

- 1. Plans must include and incorporate all Mandatory and Optional Design Criteria into the plans.
- 2. The Mandatory Design Criteria must be bound with in the project specifications.
- 3. Accessibility, Energy Star and Sustainable Building reports and/or reviews and checklist must be signed and/or sealed by the Engineer or Consultant that completed the plan, design, review and checklist.

4. All plans must be 100% complete, sealed by the appropriate professional and marked released for construction. The Landscaping and Development Site Lighting plans may be preliminary plans.
5. Full parcel survey; must include adjoining parcel(s) if functionally dependent.
6. Site, Civil, Architectural and Structural plans.
  - a. Must incorporate all Geotechnical recommendations included in the soil report(s).
  - b. Provide complete sections and details.
  - c. Window and Door Schedules must be complete.
  - d. Details and Sections pages for all site features and amenities.
7. Mechanicals (HVAC, Plumbing and Electrical) and Fire Sprinkler must be completed by engineers and sealed.
  - a. Plumbing drawings must include waste and domestic water riser diagrams.
  - b. All electrical, plumbing and HVAC fixture schedules must be complete.
  - c. HVAC, manuals J, S & D.
  - d. Natural air calculations.
  - e. Outside air calculations.
8. Landscaping Plans must follow any applicable landscape municipal ordinance and include:
  - a. Existing plantings.
  - b. Proposed plantings.
  - c. Use of native drought resistance plants.
  - d. There must be 20' minimum of sod or planting bed extending out from each exterior building wall. A lesser amount will be permitted if sod extends from building wall to property line or road.
  - e. An Irrigation/sprinkler system serving all landscaped areas.
  - f. All disturbed areas not sodded must be seeded.
9. Development Site Lighting plans with representative photometrics shown on plan reflecting an average footcandles of 1.0 for all development parking, sidewalks and exterior common areas.
10. Site and Civil plans using a scale of 1" = 30' or 40'.
11. Building plans using a scale of 1/8" or 1/4" = 1'.
12. Floor Plans using a scale of 1/4" = 1' scale.
13. Elevations and Sections using a scale of 1/8" or 1/4" = 1'.

## II. ACCESSIBILITY

Developments must meet all federal, state and local accessibility standards, as well as all Authority accessibility requirements.

### A. Accessibility Consultant

All owners must contract with a third-party Qualified Accessibility Consultant to conduct the following:

1. A pre-construction plan and specification review to determine that the proposed property will meet all required accessibility requirements, including initial comments from the consultant and all documents related to resolution of identified accessibility issues. The Consultant report must be included with the initial construction documents submitted to the Authority.
2. Provide at least two training sessions to the Architect, General Contractor, Job Superintendent, and a representative of every subcontractor group that will affect accessibility (grading, concrete, framing, electrical, plumbing, sheetrock, and cabinetry) regarding accessibility requirements. One training session must be on site. Maintain a written description of the training sessions and documentation of the events.
3. An inspection of the construction site after framing. The Authority must receive a copy of the consultant's report and documentation that all issues have been resolved.
4. A final inspection of the property after construction completion to determine that the property was constructed in accordance with all accessibility requirements. The Authority must receive a copy of the consultant's report and documentation that all issues were resolved prior to cost certification submission. Developers must contact the qualified accessibility consultant directly, and contract to provide the accessibility compliance services.

The project team must discuss the scope of the specific project with the Accessibility Consultant to determine the number of site visits/reviews.

The Accessibility Consultant must:

- complete Exhibit AA, Accessibility Consultant Qualifications Statement;
- possess the required knowledge to inspect multifamily properties for compliance with all federal, state and agency accessibility requirements and meets the following experience requirements and qualifications;
- not be a member or have an identity of interest with any member of the Development Team;
- have no less than five (5) years of experience performing accessibility compliance assessments for affordable rental housing projects; and
- carry the minimum insurance coverage as required by current industry standards.

The Qualified Consultant must arrange enough visits with the Development Team to observe all areas of accessibility and to verify completion of recommended corrections.

## **B. Modification Requirements:**

1. All accessibility modifications must be in place upon completion of
  - new construction and/or
  - rehabilitation,
 including kitchen and closet shelving, grab bars, and appliances. The ability of the applicant to adapt a unit to the required standard upon request is generally not sufficient to meet this requirement. However, removable or adaptable base cabinets are permitted under kitchen and bathroom sinks and under kitchen work surfaces if written instructions for their removal and adaptation is on file in the leasing office
2. The following equipment may be stored onsite for installation at the tenant's request:
  - a. Under-sink pipe guards.
  - b. Visual/hearing impaired equipment.

- c. Tub seats.

Refer to Uniform Federal Accessibility Standards (UFAS) 4.34 for additional unit design standards and consumer information that must be available to the tenant in an accessible unit.

## C. Required Accessibility Standards:

1. **Mobility Disabled Units:** Type A, at least 5% of the total units (but no less than one unit) must be equipped for the mobility disabled, including for wheelchair restricted residents. ADA/ANSI compliant 36" x 60" minimum useable floor space roll-in showers must be incorporated into all of the Type A mobility equipped units. Mobility units with more than one bathroom must have at least one bathroom with a roll-in shower.
2. **Hearing and Sight-Impaired Units:** Type B, at least an additional 2% of the total units (but no less than one unit) must be equipped for hearing and sight-impaired residents including compliance with ICC/ANSI A117.1 Section 1006 (audio and visual notification on fire alarms and at the primary unit entrance).
  - The unit(s) must be roughed in to allow for smoke alarms with strobe lights in every bedroom, hallway outside of the bathroom, and living area.
  - A lighted doorbell button connected to an audible and strobe alarm installed in each bathroom, bedroom, and common area is required for each sight and hearing-impaired unit.
3. **5% and 2% requirement:** The same unit(s) cannot be used to satisfy the 5% and 2% requirement.
4. Signage for designated common areas and all units must be in Braille and meet ANSI A117.1, Section 703 standards.

## D. Emergency Alert System:

1. All Mobility and Hearing and Sight-Impaired Units must have a wireless or hard-wired emergency alert system installed, located in every bedroom and bathroom that either triggers an audible and visual notification outside of the dwelling unit or notifies the staff and 911 during work hours, and 911 after work hours. All call for aid devices must be installed beside or below ceiling light switches in bedrooms and bathrooms.
2. If a building fire alarm system is required, the hearing and sight-impaired units are undesignated, and the required equipment is not installed, then all units must be wired into the building fire alarm system.

## E. Older Persons 55+ Developments:

1. **Elevators:** There must be an ADA compliant elevator to all units above the ground floor.
2. **Furnished Gathering Areas:** Buildings with multi-story construction must have interior conditioned and furnished gathering areas located throughout the complex, including but not limited to areas near elevators.
3. **Accessible and Adaptable:** 100% of the non Type A units in new construction projects must be accessible and adaptable (Type B), as defined by the Fair Housing Amendments Act of 1988 and applicable regulations.

4. Hallways must have a minimum width of 42 inches.
5. Hallways and Corridors areas must have a continuous suitable handrail on both sides mounted 34 to 38 inches above finished floor, and be 1 ¼ inches in diameter.
6. Provide a minimum 18 inch grab bar in all tub/shower units. The grab bar must be centered vertically at 48 inches A.F.F. on the wall opposite the controls.
7. Provide solid blocking at all toilets and tub/shower units for grab bar installation.

### III. MANDATORY NEW CONSTRUCTION DESIGN CRITERIA

#### A. Applicability

Unless otherwise indicated, the requirements in this Section III apply to the design and construction of new amenities, buildings (including nonresidential), and other structures, including when done as part of a rehabilitation or adaptive re-use development.

#### B. Unit Size & Base Requirements

1. All residential units must meet minimum and maximum unit size requirements. The square footage measurements below are for heated square feet only, measured interior wall to interior wall, and do not include exterior wall square footage. The area occupied by the stair case may only be counted once. Unheated areas such as patios, decks, porches, stoops, or storage rooms cannot be included. The maximum number of bedrooms allowed is four (4).

Unit	Minimum	Maximum
Studio	500 square feet	525 square feet
1 Bedroom	750 square feet	840 square feet
2 Bedroom	850 square feet	1,100 square feet
3 Bedroom	1,100 square feet	1,280 square feet
4 Bedroom	1,250 square feet	1,375 square feet

The requirements in section (B)(2) below are applicable.

No more than 20% of the total number of residential units may be Studio units.

The above square footage requirements do not apply to rehabilitation projects.

For townhouses, the maximum square footage for a 2 bedroom is 1,224 and 1,512 for a 3 bedroom.

2. Units must also meet the following requirements:
  - a. Studio Apartment: the bedroom, living area and full kitchen may be contained in the same room; must have one full bathroom and laundry room.
  - b. One Bedroom Apartment: at least six rooms including a living room, dining room, full kitchen, one bedroom, one full bathroom and laundry room.
  - c. Two Bedroom Apartment: at least seven rooms including a living room, dining room, full kitchen, two bedrooms, one full bathroom and laundry room.



- d. Three Bedroom Apartment: at least nine rooms including a living room, dining room, full kitchen, three bedrooms, two full bathrooms and laundry room.
- e. Four Bedroom Apartment: at least ten rooms including a living room, dining room, full kitchen, four bedrooms, two full bathrooms and laundry room.

Designers are encouraged to combine living, dining and kitchen rooms into a single space to promote family community.

The above room requirements do not apply to rehabilitation projects.

- 3. Bedroom Size: The primary bedroom in each unit must be at least 144 square feet. All other bedrooms must be a minimum 120 square feet. The minimum bedroom square footage excludes the closet space.
- 4. Living Room Size: The living room must be at least 150 square feet with a minimum dimension of 11'6".
- 5. Bathroom Requirements
  - a. Full Bathroom: must contain a toilet, vanity with sink and a 32" x 60" gasketed fiberglass tub/shower combination.
  - b. Half Bathroom: must contain a toilet and a vanity with sink.
  - c. Type A units must have the accessible bedroom and bathroom with one roll-in shower located on the accessible floor.
  - d. Town Homes without a bed and bath on the main floor will be required to have a half bathroom located on the main floor.
  - e. Whirlpool tubs are prohibited.
- 6. All units must have a balcony, sunroom, or patio.
  - a. Patios and balconies must be 65 square feet minimum inside the railing.
  - b. Sunroom must be 70 square feet minimum and:
    - i. Contain a minimum of three operable window units.
    - ii. Have distinct architectural separation from the living room.
    - iii. Front porches are not considered patios.
  - c. Applicants may request a waiver for this requirement before the submission deadline if building zoning or design restrictions prohibit.
- 7. All Single Family, Townhouse and Duplex Developments must have:
  - a. A covered / roofed front main entryway that must be a minimum 5' x 5' and
  - b. A porch, patio or deck at a minimum of 70 square feet. A front porch on a single-family home or stacked duplex is acceptable to meet this requirement and must be 100 square feet minimum.
- 8. Hallways, interior:
  - a. 40" minimum width in all family units.

- b. 42” minimum width in all older persons units.
- 9. Breezeways and Stairways: 48” minimum clear path of travel is required through building breezeways and public/common use stairways.
- 10. Moisture resistant gypsum board must be installed on all ceilings and walls of bathrooms, on all walls of laundry rooms, mechanical closets and exterior storage closets, and behind kitchen sink base and dishwasher.
- 11. Water-resistant gypsum board or equivalent shall be provided behind any tub/shower unit located on an exterior wall.
- 12. Fireplaces are prohibited in residential units.

## C. Community Room(S), Site Amenities & Facilities

Community room(s) and amenities must be consistent with the design and appearance of the residential buildings. Development lighting is required for all amenities. Amenities should be usable beyond leasing office hours and on weekends and include occupancy sensor lighting or photocell lighting if an exterior amenity.

A Phased Development with a previously funded phase will not share amenities with a previous phase without the Authority’s prior written consent.

### 1. COMMUNITY BUILDING OR ROOM

Community room(s) and site amenities may be incorporated into the resident / unit buildings therefore eliminating the need for a community building. If provided, a community building must be at least 1,200 square feet and include the community multi-purpose room and ADA compliant handicapped toilet facilities. The community building may include a leasing office of 200 square feet minimum, laundry rooms, and storage / maintenance rooms. Screened porch(es), sunroom(s), and covered patio(s) may be incorporated into the community building, but their square footage will not be included as part of the 1,200 square foot minimum for the community building. All primary entrance doors in the community building and site amenities must be either half lite or full view commercial grade glass, unless otherwise noted, to allow residents a view of the outside/inside. This does not include the maintenance or storage room doors. Blinds are prohibited on these doors. For rehabilitation projects without an existing community building/room is not required to construct a new community room or building or meet the required amenities listed below with exception of the playground for family developments.

### 2. REQUIRED AMENITIES

- a. Community multi-purpose room must be adequately furnished. Must contain a minimum of 8 square feet for each unit, rounded up for a total of 1,000 square feet, never being less than 250 square feet regardless of developments total units.
- b. Kitchenette with a minimum of 6 linear feet of counter top that is equipped with refrigerator, microwave, sink and a 5lb. fire extinguisher.
- c. An exercise room equipped with a minimum of three low impact cardio machines.
- d. Tenant computer room equipped with two new current and updated computer systems that include a scanner and printer. Computers must be connected to a high-speed internet service. All

equipment must be kept current for the entire compliance period. All expenses associated with supplies, updates, internet service and replacement of the computer equipment is the responsibility of the development.

- e. For a single building multi story development, a covered drive thru at building main entry with 13' vehicle headroom clearance minimum (Older Persons 55+ only).
- f. Playground (Family developments only)
  - i. Equipment must be of commercial design and quality.
  - ii. All playgrounds must each contain at least four play stations/activities.
  - iii. Playground must be located away from areas of frequent automobile traffic and situated such that the play area is visible from the office and maximum number of residential units.
  - iv. Playground must be accessible to persons with mobility impairments.
  - v. A bench that is weather resistant, metal or composite, have a back, and be anchored permanently.

### 3. LAUNDRY FACILITIES

- a. Laundry facilities are required for all developments not providing washers and dryers in all rental units. For rehabilitation projects without an existing laundry facility is not required to construct a new laundry facility.
- b. Entry into the laundry facility must be available at all times and days.
- c. The development must provide washer and dryer hookups and space as required per development based upon the total units in the development as follows:

Up to 30 units	2 Washers and 2 Dryers
31-60 units	4 Washers and 4 Dryers
61-100 units	5 Washers and 5 Dryers
100+ units	7 Washers and 7 Dryers

The development must supply at all times a minimum one washer and one dryer. If tenant needs and usage exceeds the washers and dryers provided, the development must supply up to the required amount above.

- d. The entrance must have a minimum roof covering of 20 square feet and have adequate lighting functioning from dusk to dawn.
- e. The primary entrance door to the laundry facilities must be full view / full length glass to allow residents a view of the outside/inside. Blinds are prohibited.
- f. Contain adequate seating
- g. A working surface for folding cloths must be installed.
  - i. 24" x 48", 8 square feet minimum.
  - ii. Must provide working space of 8 square feet per every twelve washer/dryers provided.
- h. One of every twelve washer/dryers provided must be ADA compliant and accessible with one working surface also being ADA compliant and accessible.

#### 4. POSTAL FACILITIES

If not located within the building, the postal facility must:

- a. have a roof covering which offers residents ample protection from the rain while gathering mail;
- b. be located adjacent to available parking and sited such that tenants will not obstruct traffic while collecting mail; and
- c. have adequate lighting functioning from dusk to dawn.

#### 5. OFFICE AND MAINTENANCE ROOM

- a. Development must have an office on site of 200 square feet minimum. Does not apply to rehabilitation projects.
- b. Development must have a maintenance room of 200 square feet minimum. Does not apply to rehabilitation projects.
- c. The office must contain ADA compliant toilet facilities.
- d. Office must be clearly marked and visible with exterior signage on or close to building.

#### 6. PARKING, ROADS, SIDEWALKS AND DEVELOPMENT SIGN

- a. Parking and side walk lighting must be provided.
- b. All roads and parking areas are to be asphalt or concrete paved.
- c. Curbing is required for all roads and parking areas throughout the development site.
- d. Parking areas must be located on the development site.
- e. The primary property entrance must have a development sign designed with brick or stone columns with lighting and a Fair Housing logo.
- f. All sidewalks and walkways shall be a minimum of 48" in width, must be made of concrete, and must comply with the following requirements:
  - i. Provide access to all parking spaces, front entryway doors, amenities, driveways and leasing office.
  - ii. Sidewalks may not exceed a 2% cross slope regardless of where located. Provide a non-skid finish to all walkways.
  - iii. Switchbacks are not permitted from handicap parking spaces or access aisles to building entrance in new construction projects.
  - iv. Be ADA accessible and compliant as required within the development with clearly marked ramps, crosswalks, signage, etc. in accordance with ADA regulations.
  - v. The developments sidewalks must join the local existing sidewalks if they exist.

#### 7. PARKING SPACES

If local guidelines mandate parking less than the Authority requirement, the development must receive Authority approval prior to application submittal.

- a. All developments require a minimum number of parking spaces per unit size as follows:
  - i. One bedroom units are 1.0 parking spaces per unit.

- ii. Two bedroom units are 1.5 parking spaces per unit.
  - iii. Three and four bedroom units are 2.0 parking spaces per unit.
- b. There must be at least one handicap parking space for each designated accessible unit that must be the nearest available parking space to the unit.
  - i. All handicap parking spaces and associated aisles must be concrete.
  - ii. Handicap ramps may not protrude into parking lot.
  - iii. Access aisles cannot be installed through vehicular paths of travel.
- c. All non-handicap parking spaces must be an asphalt or concrete solid surface with a minimum dimension of 8 feet wide and 18 feet deep. Ten (10) percent of the required parking spaces can be compact parking spaces.

The minimum number required parking spaces does not apply to rehabilitation projects.

## 8. REFUSE COLLECTION AREA (S) AND RECYCLING

- a. Collection area(s) should not be placed at the entrance or exits of the development unless the collection area provides the following:
  - i. A pull off from the main road consisting of a cul-de-sac / turn around.
  - ii. Dumpster drop off or pick up that does not stop or impede the flow of traffic.
  - iii. Tenant use that does not stop or impede the flow of traffic.
- b. Provide an easily-accessible area that serves the entire development for the refuse collection area and recycling area. These can be combined into one area.
- c. Dumpsters / trash compactors and recycling area must be ADA accessible and located on an ADA accessible route or have ADA parking near the collection area(s).
- d. Provide a collection and storage area of non-hazardous material for recycling.  
Property management is responsible for prominently displaying a sign stating exactly which materials are and are not accepted for recycling.
- e. The pad and approach pad to the dumpster must be concrete. The approach pad must meet the requirements determined by a professional engineer. At a minimum, the dumpster pad must include two painted pipe bollards installed behind each dumpster.
- f. Pedestrian paths of accessible travel must be marked/identified (painted in yellow or white) on dumpster pad surfaces.
- g. The dumpster / trash compactor and recycling pad / area must be enclosed on at least three sides with materials that will be consistent with the design and appearance of the residential buildings. An enclosure combining masonry, cementitious products or composite products are acceptable enclosures or these products can be used independently. PVC or vinyl fencing is acceptable. Chain link and wood fencing are not acceptable.

The above requirements for Refuse Collection Area and Recycling do not apply to rehabilitation projects with exception of items c., d., and g.

## D. Site and Site Lighting

1. Utilities (including but not limited to sanitary sewer, water, gas/electric, cable, internet, and telephone) must be underground throughout the development site.
2. Lots must be graded so as to drain surface water away from foundation walls. The final grade away from foundation walls must fall a minimum of  $\geq 0.5$  inches per foot away from building for  $\geq 10$ ft according to the National Water Management System Requirements under Energy Star Multifamily New Construction.
3. Provide positive drainage at all driveways, parking areas, ramps, walkways and dumpster pads to prevent standing water.

Utilize yard drains if needed, piped to storm water system or to daylight.

4. All water from roof and gutter system must be discharged no less than 6 feet from building foundation with positive drainage that is not impeded by mulch or other landscaping ground cover. See gutter requirements. Does not apply to rehabilitation projects.
5. All retention and/or detention ponds must be fenced. The storm water retention/detention basin design, maintenance and management shall be the sole responsibility of the owner/developer and shall be in strict accordance with all applicable federal, state, local and environmental regulations governing storm water retention/detention basins.
6. Site lighting is required for all parking, sidewalks, buildings and site amenities and should be directed down to diminish nuisance light in residential units. Lighting plans to be completed using photometrics software reflecting an average footcandle of 1.0 for all development parking, sidewalks, and exterior common areas.
7. No part of the disturbed site may be left uncovered or un-stabilized once construction is complete.
8. Burying construction waste on-site is prohibited.

## E. Building Foundations, Slabs and Radon

1. All buildings located in a Radon Zone 1 will require Radon Resistant New Construction Practices. Rehabilitation projects located in a Radon Zone 1 must meet Radon Mitigation Standards. The ANSI/AARST standards are available at <https://standards.aarst.org/>. Check applicable federal, state, and local building codes to see if more stringent codes apply.
2. All units and community buildings must be elevated 24" minimum above the base flood elevation. Base Flood Elevation - The elevation of an area in relation to the mean sea level expected to be reached during a flood. Based on historic data, these figures indicate which areas are most likely to be flooded. This includes all flood years (100, 500, and 1000 year) and both FEMA maps and Local flood hazard areas.
3. Slab constructed buildings / structures. Slab to be elevated a minimum of 8" above finished grade on all elevations.
4. Slab foundations will consist of a brick or stone veneer at a minimum height of 16" above finished floor elevation on all elevations.
5. Crawl space constructed home/structures will have a minimum of 30" clearance from the bottom of the lowest structural floor system framing member to grade.
6. Crawl space foundations will consist of brick or stone veneer installed up to the finished floor elevation at a minimum on all elevations.

## F. Building Exterior

The building exteriors should create a residential image appropriate to the market area. Building design must use different roof planes and contours to break up roof lines. Wide window and door trim should be used to accent siding. If horizontal banding is used between floor levels, use separate color tones for upper and lower levels or patterns.

All materials must be installed using standard construction methods and means, and result in the issuance of written manufacturer's warranty and guarantees. No exterior wood finishes may be used.

### EXTERIOR WALL FINISHES

1. Exterior wall faces (other than for single family homes, townhomes, and duplexes) must have an excess of 20% brick or natural or manufactured stone on each of the exterior wall surfaces, including the front wall face, each side's wall face and the rear wall face of the buildings (not to the interior wall faces of open breezeways). On all exterior walls the brick/stone must extend to all areas of grass, landscaping and other areas of soil or mulch. Does not apply to rehabilitation projects.
2. High quality durable low maintenance materials are required for exterior building coverings on all elevations including all exterior trims, fascia, soffits, ceilings and vents and must be warranted for at least 30 years as installed:
  - a. **Brick** must be installed per manufacturer's requirements
  - b. **Portland Cement Stucco** (No EIFS) must be installed per manufacturer's requirements
  - c. **Stone**- natural or manufactured must be installed per manufacturer's requirements
  - d. **Fiber Cement Siding & Trims** must be 5/16" thickness or greater and be installed per manufacturer's requirements
  - e. **Vinyl Siding** must have a .044" thickness or greater and be installed per manufacturer's requirements
  - f. **Vinyl Soffit** must have a .040" thickness or greater and be installed per manufacturer's requirements
  - g. **PVC or Vinyl Composite Trim Boards** must be installed per manufacturer's requirements.
  - h. **PVC Coated Trim Coil** must have a .024" thickness or greater for fascia and freeze boards only- must be installed per manufacturer's requirements

Developments must provide the Authority a written manufacturer warranty confirming a 30 year minimum warranty for all of the above items with the placed in service application.

3. Where exterior brick does not extend to an eave line, aluminum flashing shall be installed that extends a minimum of 5" under/behind the above exterior wall surface material and over the outer edge of the brick to prevent water penetration.
4. Weep holes must be below finished slab elevation and not covered by finished grade or landscaping.
5. Siding applications require all exterior penetrations to be installed on mounting blocks.
6. Metal z-flashings must be installed behind on top of and below all band boards and be of appropriate size for materials being flashed.
7. Metal flashings must be installed behind on top of and below all veneer material changes.
8. Metal flashing or 20 mil polyethylene when used in conjunction with a self-adhering polyethylene laminate flashing, must be installed above all exterior door and window units.

## EXTERIOR STAIRS, RAILINGS, COLUMNS, SIGNAGE, PATIO & BREEZEWAY

1. Columns must be sized and loaded properly and consist of fiberglass, polyurethane or aluminum. Must be installed with stand offs, bases, caps and vents per manufacturer's recommendations. 4X4, 4X6, 6X6 etc. treated wood post wrapped with coil stock are prohibited. Steel post and treated post may be utilized if built up with cement trims.
2. Exterior steps at porches and patios and porches will be constructed of brick/stone foundation veneers with concrete deck/slab.
3. Multi story second, third, or fourth floor elevated porch, patio or breezeway may be constructed utilizing concrete slabs or 5/4" composite materials for the deck. Be constructed in such a manner that no wood is exposed. Concealment of wood shall be with composite materials such as PVC coated coil stock, vinyl 1x's composite 1x's, and fiber cement trims.
4. Hand rails and/or guard rail systems used at steps, porches, and patios shall be code compliant systems made of composite materials such as vinyl, fiberglass, steel (field painted) or aluminum.
5. Public use stairway components, such as stringers, treads, and risers must be constructed from steel (primed and field painted) and/or concrete. Handrails and pickets must be constructed from steel (primed and field painted) or aluminum, and be completely under roof cover.
6. Buildings and units must be identified using clearly visible signage and numbers. Building and unit identification signage must be well lit from dusk till dawn and meet ANSI A117.1, Section 703 standards.
7. For Type A units,
  - a. ADA Handicap ramp components must be constructed from one of the following:
    - i. steel (field painted) and/or concrete
    - ii. concrete slab with brick ribbon and sidewalls
    - iii. aluminum ramp system.
  - b. Handrails and pickets must be constructed from steel (field painted) or aluminum.

## G. Roofing and Gutters

All roofing to be installed in accordance with the current IBC / IRC Chapter 9 and the Authority standards listed below. Developments are required to provide the Authority a written manufacturer warranty confirming a 30 year minimum warranty has been acquired for the installed roof system. This can be submitted with the placed in service application.

### ASPHALT SHINGLES

1. Roof pitch to be a minimum of 4/12.
2. Architectural (dimensional) anti-fungal shingles must be used and:
  - a. Must be high quality and durable.
  - b. Must be installed per manufacturer's requirements to achieve at least a 30 year warranty.
  - c. The following must be used underlayment, leak barriers, starter strip shingles and hip & ridge cap shingles. No exceptions.
3. Synthetic underlayment is required



4. Leak barriers must be the mineral surfaced type.
  - a. Leak barriers must be installed a minimum of 5" up all side walls.
  - b. Leak barrier must be installed a minimum of 24" around all roof penetration on the roof deck.
  - c. Ice barriers to be installed per IBC/IRC R905.1.2.
5. All flashing are to be installed per manufacturer's recommendations to obtain a minimum 30 year warranty and:
  - a. Step flashing to be 5"x5"x7" minimum.
  - b. Be a minimum of 0.019" (0.5 mm) in thickness.
  - c. Be factory painted.
  - d. All rakes or slopes must have step flashing.
  - e. Drip edge to be installed on all eaves and rakes per IBC/IRC R905.2.8.5 at a minimum.

## METAL ROOFING

1. Roof pitch to be a minimum of 3/12
2. Standing Seam panels must be used and:
  - a. Be 24 gauge or thicker if placed over a heated/conditioned space.
  - b. Have 1 1/2" seam height minimum.
  - c. Have striations or stiffing ribs.
  - d. Have a galvalume coating.
  - e. Must have a 30 year minimum paint warranty.
  - f. Be installed per manufacturer's recommendations.
  - g. Must be installed by certified installers.
3. Synthetic underlayment is required on roof deck.

## LOW SLOPE/FLAT ROOFING

All low slope/flat roofing products are to be installed per manufacturer's recommendations to achieve at least a 30-year warranty.

1. Products must be installed by certified installers.
2. Acceptable products are
  - a. Metal panels with a 3" seam height minimum.
  - b. Single-Ply membranes
    - i. PVC or,
    - ii. TPO or,
    - iii. EPDM
  - c. Modified Bitumen must:
    - i. Be a 2 ply system.

- ii. Be Torch down.
  - iii. Have a ceramic surface.
- 3. All Single-Ply membranes and Modified Bitumen low slope roof products to be installed with heavy duty walkway pads:
  - a. Walkway must be a different color.
  - b. Must be from same manufacture as roofing material or approved by manufacture for use.

## GUTTERS

Seamless 5" minimum gutter and downspout systems complete to be installed on all buildings.

- 1. Downspouts must be installed so as not to drain across pedestrian paths of travel
- 2. All water from roof and gutter system must be discharged no less than 6 feet from building foundation by:
  - a. Concrete splash blocks with positive sloped drainage away from foundation; or
  - b. Be piped underground to an appropriate location.

## H. Building Envelope, Insulation and Sound Proofing

- 1. All buildings must be wrapped with an exterior air and water infiltration barrier. All wall penetrations are to be taped for moisture protection or similar water barriers provided manufacture's installation steps are followed.
- 2. Seal all penetrations to prevent moisture and air leakage.
- 3. All attics to be vented.
- 4. Exterior walls R-13 insulation.
- 5. Attics R-38 insulation.
- 6. Crawl Space floors R-19 insulation.
- 7. Unit party walls and floor assemblies require sound proofing (sound batt insulation) to achieve a rating of STC 54.

## I. Windows and Doors

All windows and exterior doors must be Energy Star rated for zone south central be of high quality, durability and must be installed per manufacturer's requirements to achieve at least a 10 year warranty for windows and a 1 year warranty for Fire Rated doors. Developments are required to provide the Authority a written manufacturer warranty confirming the warranty has been acquired for the windows and exterior doors. This can be submitted with the placed in service application. An accessible automatic door opener is required for the primary entrance into and out of older person's congregate buildings.

- 1. All interior doors must:
  - a. Be side hinged.
  - b. Be hollow core paneled hardboard, paneled solid wood, or hollow core flush hardwood.
  - c. Bedroom doors must be 3-0. Does not apply to rehabilitation projects.
  - d. Bath doors minimum of 2-8. Does not apply to rehabilitation projects.

- e. Closet doors minimum of 2-6. Does not apply to rehabilitation projects.
  - f. Pantry doors minimum 2-0. Does not apply to rehabilitation projects.
  - g. Hollow core, flush lauan doors are prohibited.
  - h. ADA accessible doors at common areas and Type A units must:
    - i. Have ADA lever hardware.
    - ii. Be 3-0 minimum.
  - i. Have a 3/4" minimum air space at bottom of door measured from finished floor for air circulation.
  - j. Louvered doors at HVAC closet for air handler return are acceptable.
2. All exterior doors must be Energy Star metal-clad or fiberglass doors and must:
- a. Metal clad steel edge doors and frames are acceptable for use in firewalls only.
  - b. Be side hinged.
  - c. Be a minimum of 3-0 in width (34" clear width). Does not apply to rehabilitation projects.
  - d. Have a rot proof jamb.
  - e. Include a peephole on main entry door.
  - f. Have a thumb latch / lever style deadbolt lock.
  - g. ADA accessible doors at common areas and Type A units must:
    - i. Have a maximum threshold height of 1/2".
    - ii. Have ADA lever hardware.
    - iii. Include a peephole a maximum of 48" AFF at primary unit entry door only.
    - iv. Have spring hinges at the unit's primary unit entry door only.
  - h. Primary unit entry doors must have a minimum roof covering of 3'w x 5'd with corresponding porch/pad or be located in the breezeway.
  - i. High quality vinyl sliding glass doors are acceptable for use at the back door to the patio or deck and must:
    - i. Have multi point locking hardware keyed alike.
    - ii. Include coastal hardware.
3. Windows must be Energy Star rated for zone south central and must:
- a. Have blinds for each window installed.
  - b. Metal blinds are prohibited.
  - c. Provide window manufacturers data sheet (s) with plans.
  - d. Be single hung, double hung, casement or awning. Sliding windows are prohibited. Sliding windows are acceptable to rehabilitation projects.
  - e. Be vinyl.
  - f. Have appropriate design for exterior finishes.

- i. Windows installed in brick or stucco veneer must meet manufacture's recommendation for installation and water proofing.
- ii. Windows installed in siding veneers must meet manufacture's recommendation for installation and water proofing.
- iii. Windows installed with 1x perimeter trim must meet manufacture's recommendation for installation and water proofing.
- g. Not be installed over bath tub/shower.
- h. Be continuously caulked behind the flange and taped per the manufacture's recommendations.
- i. Be installed per window manufactures recommendations.
- j. In Type A units, all windows and blinds must meet or exceed all State and Federal accessibility requirements.

## J. Kitchens

1. All kitchen cabinets shall be constructed with solid wood or plywood stiles, rails, doors and drawer fronts. All cabinets will conform to the performance and fabrication requirements of ANSI/KCMA A161.1-2000.
  - a. Drawers must have dual slide tracks.
  - b. Accessible cabinets with removable fronts must be manufactured to be removable with only a screwdriver.
  - c. Site built cabinets are prohibited.
2. Each kitchen must have at the least the following minimum linear footage of clear countertop that are at or below 36 inches in height above finished floor, excluding the sink and range space:
 

Studio	5.0 linear feet minimum
1 Bedroom	8.0 linear feet minimum
2 Bedroom	10.0 linear feet minimum
3 Bedroom	12.0 linear feet minimum
4 Bedroom	13.0 linear feet minimum

This amount must be clearly shown on the plans.

The minimum linear footage of clear countertop requirement does not apply to rehabilitation projects.

- a. Counter tops may be manufactured post form, granite or solid surface.
  - b. Site built tops countertops must be constructed of 3/4"AC plywood. No particle board, press board or fiber board will be allowed.
3. All units must have an 18 cubic foot minimum Energy Star rated frost free refrigerator freezer with ice maker. Does not apply to rehabilitation projects.
  - a. Doors must open beyond 90 degrees to allow bin removal.
  - b. Ice maker box (cold water supply) with shut off must be installed behind the refrigerator.
4. All units must have an Energy Star rated dishwasher and be installed beside the kitchen sink. Does apply to rehabilitation projects.

5. All units must have a double bowl kitchen sink 8" deep minimum. Does not apply to rehabilitation projects.
6. All units must have over the range microwave.
7. All units must have a slide in range that is at least 30 inches wide or a cooktop and wall oven.
  - a. A backsplash panel must be installed behind the cooktop and cover the entire wall behind the cooktop.
  - b. Anti-tip devices must be installed on all kitchen ranges and be securely fastened to the floor.
8. All units must have a Fire Stop or comparable extinguishing system over the stove. Alternatively, the range must have SmartBurner elements installed in the range.
9. Each unit must be equipped with a 5 lb. ABC rated dry chemical fire extinguisher readily accessible in the kitchen and mounted to accommodate handicapped accessible height in accessible units. If contained in the cabinet/pantry area must have proper signage, 4" X 3" minimum, identifying the location.
10. A 24" wide pantry cabinet, same manufacture as kitchen cabinets, or a pantry closet with a 24" interior door and a minimum of 24' deep must be provided in the kitchen.
11. Fluorescent lighting or LED lighting is required in the kitchen.
12. The aisle width between cabinets and/or appliances is 42" minimum. Does not apply to rehabilitation projects.
13. For Type A units:
  - a. The refrigerator must be ADA compliant.
  - b. Kitchen sinks must be ADA compliant and:
    - i. Be 6 ½" deep maximum.
    - ii. Be rear-draining.
    - iii. Sink bottoms insulated if bottom of sink is at or below 29 inches above finished floor.
  - c. The range / cooktop / wall oven must be ADA compliant.
  - d. Pull-out worktops are prohibited
  - e. Workstations must be installed beside the range with no wall to the left or right of the workstation.
  - f. The wall cabinet mounted over the work station must be 48 inches maximum above finished floor to the top of the bottom shelf.
  - g. Provide cabinet microwave shelf with microwave or counter top microwave.
  - h. Unit must have a 30" range hood.
  - i. The range hood fan and light must have separate remote switches.
  - j. Kitchen counter tops and ranges with cooktop must be ADA compliant.
  - k. Provide ADA compliant cabinet handles/pulls on cabinet doors and drawers. Knobs are prohibited.

## K. Bathrooms

1. All bathroom vanities/cabinets shall be constructed with solid wood or plywood stiles, rails, doors and drawer fronts. All cabinets will conform to the performance and fabrication requirements of ANSI/KCMA A161.1-2000 and:
  - a. Drawers must have dual slide tracks.
  - b. Accessible cabinets with removable fronts must be manufactured to be removable with only a screwdriver.
  - c. Site built cabinets are prohibited.
2. Vanities/cabinets shall be provided in all units and must be 36" minimum.
3. All full bathrooms must have:
  - a. Ceiling light and exhaust fan on the same switch and must provide adequate lighting to the tub/shower.
  - b. Vanity light must be provided and be on a separate switch.
4. All half bathrooms must have:
  - a. Ceiling light and or vanity light, must provide adequate lighting
  - b. Exhaust fan.
  - c. These can be switch together or separately.
5. Mirror length must extend from the top of vanity backsplash to 6' minimum above finish floor. Framed decorative mirrors are excepted if they meet the above requirements.
6. Tub/shower units must be 32" x 60" minimum fiberglass based units with slip resistant floors. Shower head to be mounted 80" above finished floor.
7. Water closets must be centered, at a minimum, 18 inches from sidewalls, vanity/lavatories and bath tubs and be clearly marked on the plans.
8. Type A units:
  - a. Must contain a roll in shower and:
    - i. Be one piece fiberglass based unit with slip resistant floor.
    - ii. Be ADA/ANSI compliant from manufacture.
    - iii. Have factory installed grab bars.
    - iv. Have a 36" x 60" minimum useable floor space.
    - v. Have a collapsible water dam or beveled threshold that meets code.
    - vi. Approaches to roll-in showers must be level, not sloped.
    - vii. Have adjustable shower rod and weighted curtain installed before occupancy.
    - viii. Shower floor may not be used for code required 67" clear floor space in bathrooms.
    - ix. The shower head with wand must be installed on a sliding bar and within code required reach ranges by the seat.
    - x. An additional diverter must be installed to provide water to a shower head on the short shower wall in front of the seat, mounted 80" above finished floor.

- b. Accessible cabinets with removable fronts must be manufactured to be removable with only a screwdriver.
- c. Vanity tops or top of sink rim can be no higher than 34" above floor.
- d. Provide ADA compliant cabinet handles/pulls on cabinet doors and drawers. Knobs are prohibited.
- e. Provide solid blocking at all toilets and tub/shower units for grab bar installation.
- f. If providing a wall hung sink in an accessible unit it must have solid blocking behind the fixture and a recessed medicine cabinet or a storage cabinet must be provided.
- g. A wireless or hard-wired call for aid station is required in all bathrooms

## L. Bedrooms, Closets and Storage Closets

- 1. The primary bedroom must have at least 144 square feet, excluding the closet(s). Does not apply to rehabilitation projects.
- 2. Secondary bedrooms must have at least 120 square feet, excluding the closet(s). Does not apply to rehabilitation projects.
- 3. Every bedroom must have a closet at a minimum of 24" deep and contain a 5' long minimum wire shelf and closet rod. Does not apply to rehabilitation projects.
- 4. All interior and exterior mechanical and storage closets must have finished floor coverings.
  - a. Interior closets must have carpet or resilient flooring.
  - b. Interior mechanical closet must be resilient flooring

## M. Laundry Room

- 1. All developments must have a washer and dryer hookup in each unit and:
  - a. Have a minimum depth of 36" measured from the back of the door.
  - b. Must accommodate a full sized 30" washer and dryer adjacent to each other.
- 2. Washer water shutoff valves must be installed right side up with the hose connection below the shutoff handle.
- 3. Dryer vent connection box must be galvanized metal and be located above the baseboard.
- 4. In Type A and Type B units,
  - a. Each clothes washer and dryer must be centered for a side approach only. Does not apply to Type B units in rehabilitation projects.
  - b. The washer and dryer clear floor space areas may overlap.
  - c. All electrical, plumbing, and venting rough-ins must be centered behind each washer and dryer to allow them to be centered for side approach.

## N. Floor Coverings

All materials must be installed to manufacturer's specifications using standard methods and resulting in the issuance of a manufacturer's guarantee / warranty. Manufacturer's written warranties must be provided to the Authority with the placed in service application.

1. Living Areas must have Luxury Vinyl Tile (LVT), Ceramic Tile, Laminate Flooring or Hardwoods.
2. Bedrooms may have carpet.
3. Kitchens, Bathrooms, Laundry room, Mechanical closets, Dining areas, and Foyer/ entrance area must have resilient flooring LVT, Sheet Vinyl, VCT or Ceramic Tile. Shoe molding must be installed in all resilient flooring areas.
4. LVT must have a 12mil wear layer and provide a minimum 15-year residential warranty. LVT installed in kitchens, bathrooms, laundry areas and mechanical closets must be water resistant.
5. Sheet vinyl must be a minimum 0.095 thickness and provide a minimum 20-year residential warranty.
6. VCT must be at minimum 0.080 thickness.
7. Ceramic floor tile shall be minimum 12" x 12" and installed over poured concrete slab or cementitious backing material.
8. Carpeting shall comply with FHA -HUD Use of Materials Bulletin No. 44d.
9. Carpet pad must be installed under all carpeting and shall comply with FHA -HUD Use of Materials Bulletin No. 72a.
10. Carpets used in Type A unit bedrooms must be glue-down type without padding.
11. Carpet tile may be used in common area and must be:
  - rated for severe use with a 3.5 or greater TARR rating,
  - open cell backed, no hard backed tiles. and
  - stain resistant.

## O. Mechanicals

1. Non-Unit, "development", spaces must have separate HVAC systems. AKA "House System"
  - a. Must have a combined 15 SEER2 Energy Star rated HVAC system.
  - b. All refrigeration lines must be insulated.
  - c. Must be located within the developments building space.
2. All units must have individual central heat and air, HVAC.
  - a. Manuals J, S & D must be utilized for design requirements. HVAC manufactures J, S & D software can be utilized to provide the required manuals as long as that manufacturer's equipment is being installed.
  - b. All units must have a combined 15 SEER2 Energy Star rated HVAC system.
  - c. All refrigeration lines must be insulated.
  - d. Traditional air handler, heat pump and ducted HVAC system are acceptable.
  - e. Mini split ducted or ductless systems are acceptable.



3. All HVAC air handlers must be contained within the unit.
4. Bottom of returns must be 12" minimum above FFE.
5. All openings in duct work at registers and grilles must be covered after installation to keep out debris during construction.
6. The use of duct board is prohibited.
7. Connections in duct system must be taped and sealed with mastic and fiberglass mesh.
8. Ductwork located in unconditioned spaces must be insulated with R-8 minimum.
9. Galvanized metal or aluminum must be used for plenums and mixing boxes.
10. Electric mechanical condensate pumps are not allowed.
11. All hub drains serving HVAC condensate lines must be piped to the outside. Piping to the sanitary sewer is not allowed unless a primed p-trap is installed.
12. All bedroom closets, interior storage rooms, coat closets, and laundry rooms/closets must have a 4 inch tall by 8 inch wide minimum pass-thru grille above doors for air circulation in those areas that do not get conditioned. Does not apply to rehabilitation projects.
13. There must be a minimum of ¾ inch air space under all interior doors measured from finished floor for air circulation.
14. All bath exhaust fans shall be rated at 70 CFM minimum vented to the exterior of the building using hard ductwork along the shortest run possible. Venting through the roof is prohibited.
15. Dryer vents must be vented to the exterior of the building using hard ductwork along with the shortest run possible: maximum run is 35' including deductions for elbows.
  - a. Vent connection must be centered behind the dryer.
  - b. Venting thru the roof is prohibited.

## P. Plumbing

1. Sanitary sewer main lines cannot be located under the slab of a multifamily single-story design, single family homes, townhouses and duplex developments. The sanitary sewer main line must run on the front, side or back of the building / structure and provide a sanitary sewer service tie in for each unit. Sub metering, readable, is required for all units in multifamily multi story developments.
2. Individual water meters are required for all units in multifamily single-story designs, single family homes, townhouses and duplex developments.
3. Unit water cut offs must be in an easily accessible area and clearly marked with signage.
4. All domestic water line cut off valves must have metal handles, not plastic.
5. Domestic water lines are not allowed in unconditioned spaces.
6. Offset toilet flanges are prohibited.
7. All shower valves to be anti-scald.
8. Water sense fixtures must be used:
  - a. Toilets 1.28 GPM or less.
  - b. Showerheads, Kitchen faucets and Bath faucets 1.5 GPM or less.

9. Washer/dryer hookups in all units.
10. Toilets to be ADA height in all units.
11. Toilets must be centered, at a minimum, 18 inches from sidewalls, vanity/lavatories and bath tubs and be clearly marked on the plans.
12. Water heater for each unit:
  - a. Electric water heaters must meet Energy Star requirements.
  - b. Gas water heaters must meet Energy Star requirements.
  - c. 30 gallon minimum for one and two bedroom units.
  - d. 40 gallon minimum for three and four bedroom units.
  - e. Prohibited to be mounted above equipment or appliances.
  - f. Located in the units insulated envelope.
  - g. Placed in drain pans with drain piping plumbed to disposal point as per the latest approved addition of the International Plumbing Code.
  - h. Pipe all Water Heater Temperature & Pressure (T&P) relief valve discharges to disposal point as per the latest approved edition of the International Plumbing Code.
  - i. Elevated if necessary for proper pan drainage.
  - j. Use of gas tankless water heaters is allowed with above requirements.
  - k. Use of electric tank less water heaters is allowed with the above requirements and the electrical panel must be rated at 200 amps or greater.
13. All hub drains serving HVAC condensate lines and water heater lines must be piped to the outside. Piping to the sanitary sewer is not allowed unless a primed p-trap is installed.
14. Frost-proof exterior faucets must be provided on every building with in a multi story development on the "House" water supply. Locations should be maintenance based.
15. All single family, Townhouse, Duplex and single story development must supply a frost-proof faucet at the front and rear of each unit on the unit's water supply. Does not apply to rehabilitation projects.

## Q. Electrical

1. Units must have separate electrical systems.
2. Non-residential, "development", spaces must have separate electrical systems. AKA "House".
3. Hardwired interconnected Smoke Detectors and Carbon monoxide detectors are to be installed as required by all applicable codes and regulations local, state and federal.
4. All switches and thermostats to be mounted no more than 48" above the FFE.
5. All receptacles, telephone jacks (Older Person +55 Development), and cable jacks to be mounted 15" minimum above FFE.
6. All ceiling fans to be Energy Star rated.
7. All bulbs to be Energy Star rated.
8. All units must have an Energy Star rated ceiling fan with light fixture located in the living room and all bedrooms with the light and fan being wall switched separately.

9. Overhead lighting is required in all bedrooms, bathrooms, laundry rooms, closets (other than pantries or coat closets), and storage rooms and to be wall switched. Does not apply to laundry rooms and closets for rehabilitation projects.
10. Exterior lighting is required at each unit entry door and to be wall switched by door unit. Buildings with conditioned interior corridors with access doors at each end with 24/7 “House” lighting are exempt from this requirement at the unit main entry door only.
11. All units pre-wired for high speed Internet, phone and data hook-up with:
  - a. One centrally located connection port within the unit with capabilities in the living room and each bedroom.
  - b. All internet, phone and data lines must be toned and tagged properly to each unit.
  - c. Each building must have an internet, phone and data termination and demarcation box for each vendor connection.
12. All units in an Older Person +55 development must be pre-wired for telephone with jacks installed in the living room and one per bedroom.

All telephone lines must be toned and tagged properly to each unit.
13. Development Lighting
  - a. Serviced by the “House” electrical panel.
  - b. Must be located in all common areas, breezeways, corridors, stairwells and amenities.
  - c. Open areas and exterior amenities must be activated by a photo cell placed on the east or north side of the building.
  - d. Conditioned or closed common areas require 24/7 lighting.

## R. Energy Star

1. New Construction Multi Family Developments will:
  - a. Be built to meet and receive the Multi Family New Construction Energy Star Certification. This includes all mandatory measures; MFNC Rater Design Review Checklist, MFNC Rater Filed Checklist, MFNC HVAC Functional Testing Checklist, MFNC Water Management System Requirements.
  - b. All reports must be provided to the Authority with final inspection request.
  - c. Developments will use the Energy Star Portfolio Manager and must allow The Authority full access to this data for a minimum of five years. To share a property with The Authority, users should send a connection request to [development@SCHousing.com](mailto:development@SCHousing.com).
2. New Construction Single Family, Townhouses and Duplex Developments will:
  - a. Be built to meet and receive the Version 3.0 Energy Star Certification. This includes all mandatory measures; National Rater Design Review Checklist, National Rater Checklist, National HVAC Design Report, National HVAC Commissioning Checklist, National Water Management System Builder Requirements.
  - b. All reports must be provided to the Authority with final inspection request.
3. If the development fails to meet the requirements outlined in this section, the Authority may adjust the allowable costs for construction and may reduce the LIHTC allocation.

## S. Single Family, Townhouse and Duplex Developments

1. All detached single-family homes must contain a minimum of two (2) bedrooms.
2. Duplexes may have one bedroom if mixed development two (2) bedrooms if not mixed.
3. Townhouses must contain:
  - a. a minimum of two (2) bedrooms
  - b. Town Homes without a bed and bath on the main floor will be required to have a half bathroom located on the main floor.
  - c. Townhouse definition: A single family dwelling unit constructed in a row of three or four attached units two or three stories tall in which each unit extends from foundation to roof with a yard or public way in the front and back. Each unit would have its own separate street address. These units would be considered IRC R-3 buildings.
4. Must have concrete driveways (if providing individual driveway for each unit), curbing at street and front entry walkways. Curbing at street will be waived for scattered site developments.
5. May use trash cart container if the locality provides such and:
  - a. Must provide enclosed storage at each unit for the trash cart.
  - b. Must have one for each unit.
  - c. Must provide letter stating this service is available.

## T. Adaptive Re-Use of Existing Structures

The definition of “adaptive reuse” is the conversion of an existing non-residential building(s) into a residential building(s). The architect must certify on Exhibit G that the development will meet the following requirements:

1. A minimum of fifty percent (50%) of the square footage of each existing building(s) must be converted to residential use.
2. If additional buildings/units are constructed to provide additional space, the total square footage of the previously existing building(s) must constitute a minimum of fifty percent (50%) of the total square footage of the entire development.
3. Reseal all asphalt parking and roadway surfaces throughout the development.

# IV. MANDATORY REHABILITATION CRITERIA

## A. Applicability

The following requirements apply to rehabilitation of existing units. Other than as described below, existing developments do not need to be physically altered to meet new construction standards.

Design documents must show all proposed changes to existing and proposed buildings, parking, utilities, and landscaping. An architect or engineer must prepare the design drawings.

All amenities and common areas must be brought to current ADA requirements. Any replacement of existing materials or components must comply with the design standards for new construction. In addition to needs identified by the Authority, the rehabilitation scope of work must include the following:

## 1. UNIT INTERIORS

- All bi-fold and accordion doors must be replaced with hinged doors.
- Shoe molding must be installed in areas where glue down or laminate flooring is/was installed.
- Splash panels must be installed behind all ranges.
- Stair handrails must have continuous wood blocker board.
- Anti-tip devices secured to the floor must be installed under all ranges.
- Interior painting must include the entire unit.

## 2. PLUMBING

- All water heaters must be in an overflow pan and piped to the outside (where possible).
- All units must have individual water shut off valves in the unit.
- Water heaters under kitchen countertops must be relocated.
- All polybutylene (“Quest”) piping must be replaced.
- All original cast iron p-traps must be replaced.

## 3. ELECTRICAL

- All receptacles, switches and cover plates must be replaced.
- All units must have looped smoke alarms.
- In bathrooms, overhead ceiling light must be switched with the exhaust fan and the vanity light wired to a separate switch. If a ceiling light is not present, one must be installed and switched accordingly.
- Ceiling fans with lights must be installed in all living rooms and bedrooms. Fan and light must be wired to a separate switch.
- A telephone jack must be installed in the primary bedroom next to a receptacle for future TTY use.
- A centrally located port supporting tenants personal (private) wireless high speed internet equipment, per unit.

## 4. HEATING AND AIR

- Hard duct all new and existing bathroom exhaust fans where possible (in attics).
- Existing HVAC air handlers must have a secondary condensate overflow line or cutoff switch.
- Clothes dryer venting must be hard ducted to the exterior and concealed in wall.

## 5. SITE WORK

- Existing site lighting must be adequate and functioning according to photo metric analysis software.
- Property entrance must have a monument sign with brick or stone columns.
- Sewer lines must be scoped and repaired/replaced as needed.
- Painted pipe bollards must be installed behind all dumpsters.

## 6. MISCELLANEOUS

- Attic insulation must meet R-30 minimum value.
- An automatic accessible door opener is required for the primary entrance into and out of senior congregate buildings.
- All Type A accessible units must be brought to current building standards.
- Existing fire walls in attics between units must be intact and solid.

- Attic access panels must be lockable with keys available.

## **B. Applicants must submit the following**

These tests must be provided 10 months after receiving an award.

1. For properties built prior to 1978, a hazardous material report that provides the results of testing for asbestos containing materials, lead based paint, Polychlorinated Biphenyls (PCBs), underground storage tanks, petroleum bulk storage tanks, Chlorofluorocarbons (CFCs), and other hazardous materials. Professionals licensed to do hazardous materials testing must perform the testing. A report written by an architect, building contractor or developer will not suffice. A plan and projected costs for removal of hazardous materials must be included.
2. All properties must be tested mold by licensed professional in these areas and a plan for removal or remediation of any issues. At least ten (10) percent of the total number of units must be tested. The testing must include at least one (1) centrally located unit in each building.
3. All properties located in Radon Zone 1 must be tested by a licensed professional in these areas and a plan for remediation of any issues.
3. A report assessing the structural integrity of the building(s) being renovated from an architect or engineer. Report must be dated no more than six (6) months from the full application deadline.
4. A current termite inspection report. Report must be dated no more than six (6) months from the full application deadline.

## **C. Replacement Reserve**

Applications must demonstrate the replacement reserve is adequate to maintain and replace any existing systems and conditions not being replaced or addressed during rehabilitation.

# APPENDIX C1 - 9% LIHTC

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## I. APPLICATION AND AWARD LIMITATIONS

### A. Applications

Unless otherwise specified, all QAP and Appendix references to “application” refer to the full application. A member of a Development Team (as defined herein) may not be associated with or submit more than four (4) full applications or five (5) preliminary applications.

To be considered in the competitive round, all applications must be submitted by the required due dates as specified in the LIHTC Program Schedule.

### B. Award Limitations

1. The Authority will not award more than two (2) applications to any member of a Development Team. Additionally, the Authority will not award more than the following in federal LIHTCs to any one (1) application:

- Urban - \$1,450,000
- Suburban - \$1,350,000
- Rural - \$1,250,000
- PHA – the maximum amount is determined by the county of the project

For purposes of the maximums in this section, the Authority will determine whether a person or entity not listed in an application is a member of the Development Team for the proposed project based on relationships between the parties in previously awarded projects and other common interests.

Standard fee for service contract relationships (such as accountants or attorneys) will not be considered.

2. The Authority will award up to two (2) new construction applications per county in Urban counties and one (1) new construction application per county in Suburban and Rural counties. Urban counties receiving two (2) awards will be limited to one (1) award in the next year’s application cycle.
3. If the selection criteria would result in exceeding these amounts across set-asides, the Authority will make awards in the following order General New Construction, Rehabilitation, and High Demand New Construction. The Authority may exceed these limits in the event of inadequate demand among eligible applications which would prevent fully awarding the state’s available resources.
4. An application will be ineligible for an award of 9% LIHTCs if
  - it requests the state LIHTC, and
  - the Authority does not have enough available.

In that event, the award will go to the next highest-ranking financially feasible application in the set-aside.

## II. APPLICATION GROUPINGS, SET-ASIDES AND REQUIREMENTS

### A. County Groups

For purposes of this QAP, counties fall into one of two groups:



1. **Urban:** Aiken, Anderson, Beaufort, Berkeley, Charleston, Dorchester, Greenville, Horry, Lancaster, Lexington, Richland, Spartanburg, and York
2. **Suburban:** Cherokee, Chesterfield, , Darlington, Florence, Georgetown, Greenwood, Kershaw, Laurens, Newberry, Oconee, Orangeburg, Pickens, and Sumter
3. **Rural:** Abbeville, Allendale, Bamberg, Barnwell, Calhoun, Chester, Clarendon, Colleton, Dillon, Edgefield, Fairfield, Hampton, Jasper, Lee, Marlboro, Marion, McCormick, Saluda, Union, and Williamsburg

## B. Set-Asides

The Authority will place Applications for 9% LIHTCs in one of the set-asides described in subsections (1), (2), (3), (4) or (5) below. The percentages are of 9% LIHTCs available to the state in 2026 after making award(s) under subsection (B)(5)

The Authority will award LIHTCs starting with eligible applications earning the selection criteria ranking within each of the set-asides and continuing in descending order through the last application that can be fully funded within the range of LIHTC available in each of the set-asides.

### 1. URBAN NEW CONSTRUCTION (35-40%)

New construction projects located in an Urban county.

### 2. REHABILITATION (15 – 20%)

Rehabilitation projects. The Authority will award up to \$600,000 to one eligible RD project in this set-aside.

For purposes of the 9% program, “Rehabilitation” means a project where all of the units are in one or more currently existing residential building(s). Applications including any of the following will be considered “New Construction”:

- adaptive re-use;
- redevelopment of entirely vacant residential buildings; and/or
- proposals to increase and/or substantially re-configure residential units.

### 3. SUBURBAN NEW CONSTRUCTION (25-30%)

New construction projects located in a Suburban county.

### 4. RURAL NEW CONSTRUCTION (5 - 10%)

New Construction projects located in a Rural county.

### 5. PUBLIC HOUSING AUTHORITY (ONE AWARD)

The Authority will make an award to applications involving the demolition and new construction to replace existing public housing. A local public housing authority (or a related entity) must be listed as a general partner or managing member of the ownership entity. This award will not count towards per county limit.

## C. Nonprofit Set-Aside

If necessary, the Authority may adjust the allocations of awards of the state's federal tax credit ceiling under the QAP to award projects involving tax-exempt organizations (nonprofits). The Authority may adjust such awards to allow up to approximately ten percent (10%) of the state's federal tax credit ceiling being awarded to such projects. In its sole discretion, the Authority may also choose to roll forward up to approximately ten percent (10%) of the state's federal tax credit ceiling.

1. Eligible nonprofit organizations must meet the following criteria:
  - a. is a tax-exempt organization under Section 501(c)(3) or 501(c)(4) of the Code;
  - b. has three (3) full-time staff whose responsibilities include the development of housing;
  - c. is qualified to do business in the State of South Carolina, as evidenced by having a status of "Good Standing" with the South Carolina Secretary of State's Office;
  - d. has among its exempt purposes the development of low- income housing; and
  - e. complies with the requirements for material participation contained in the Code, including but not limited to a narrative statement, certified by a resolution of the nonprofit's Board of Directors, describing the nonprofit's plan for material participation during the development and compliance period and participation must be continuous and ongoing throughout the compliance period.
2. The nonprofit organization or the wholly owned single-asset entity subsidiary must own (directly or through the partnership) at least 51% interest in the general partner (GP) or managing member (MM) of the Owner entity in accordance with current laws and IRS regulations throughout the development's compliance period.
3. The nonprofit GP or MM may be an association or alliance of eligible nonprofit organization(s) and a for profit organization(s).
4. Fees paid to third party development consultants, evidenced by the cost certification, must not exceed \$35,000. The consultant fee must be for legitimate and necessary consulting services.
5. Only the nonprofit GP or MM has the authority to exercise substantial and ongoing continuous control over the application submission process and over the subsequently produced development. All functions and responsibilities normally performed or undertaken by a GP or MM must be performed by the nonprofit.

## D. Size Requirements

New construction developments in any county may not consist of fewer than 40 affordable units and new construction developments may not consist of more than the following affordable units based on its county grouping:

- Urban Counties: **80** units
- Suburban and Rural Counties: **60** units

### III. NEW CONSTRUCTION SCORING CRITERIA

#### A. Proximity to Amenities and Jobs; Rural Area

##### 1. DISTANCE TO AMENITIES

Max - 70 points	Urban New Construction			
	Driving Distance in Miles			
Primary Amenities	≤1	≤1.5	≤2	≤3
Grocery	10	8	6	4
Shopping	7	6	5	4
Pharmacy	7	6	5	4
Retail	6	5	4	3
Healthcare	4	3	2	1
Public Facility	4	3	2	1

Max - 70 points	Suburban New Construction			
	Driving Distance in Miles			
Primary Amenities	≤2	≤2.5	≤3	≤4
Grocery	10	8	6	4
Shopping	7	6	5	4
Pharmacy	7	6	5	4
Retail	6	5	4	3
Healthcare	4	3	2	1
Public Facility	4	4	2	1

Max - 70 points	Rural New Construction			
	Driving Distance in Miles			
Primary Amenities	≤3	≤3.5	≤4	≤5
Grocery	10	8	6	4
Shopping	7	6	5	4
Pharmacy	7	6	5	4
Retail	6	5	4	3
Healthcare	4	3	2	1
Public Facility	4	3	2	1

Full Service Grocery – have a minimum size of 12,000 square feet and operate with regular business hours offering a full range and variety of foods, cleaning products and paper products. Variety of foods must include: 1.) meats, poultry and fish; 2.) breads and cereals; 3.) fresh vegetables and fruits; and 4.) dairy products.

Shopping – a big box store, shopping plaza, mall, retail strip, walkable downtown shopping district or convenience neighborhood center containing multiple stores stocked with many varieties of goods including all of the following: 1.) clothing; 2.) housewares; 3.) cleaning products; 4.) general over the counter medicine or first aid products; and 5.) personal hygiene. Clothing must contain tops, bottoms, undergarments and shoes for men, women and children. A walkable downtown shopping district must be pedestrian friendly and the distance between the qualifying establishments cannot exceed a total of .3 miles.

Pharmacy – does not include specialty pharmacies or drug services; or pharmacies or drug stores only available for patients of a designated medical practice or facility.

Healthcare – hospital, urgent care, general/family practice or clinic offering patient services. Does not include medical specialists or a local health department without a clinic.

Public Facility –

- community center with scheduled activities operated by local government;
- public park owned and maintained by local government containing, at a minimum, playground equipment and/or walking/bike trails and listed on a map, website or other official means (greenway or trailhead does not qualify);
- library operated by the local government and open a minimum of five days a week.

Retail – any grocery or shopping as defined above; any strip shopping center with a minimum of 4 operating retail or food service establishments; or any general merchandise establishment. An establishment used for points in another category will not be eligible for points in the Retail category. Vape, ABC and adult stores do not qualify.

All establishments must be open to the general public and operating as of the preliminary application deadline with no announced closing prior to the notification of the final point scores.

A maximum of two (2) amenities per category can be used.

The driving distance will be the mileage as calculated by Google Maps and must be a drivable route as of the preliminary application deadline. The drivable route must be shown in satellite view map format along with written directions. A photo of each amenity must also be provided (Google or internet photos are not acceptable). The measurement will be at any point of the site's road frontage to or from the amenity entrance and the same point on the site's road frontage will be used for all measurements. Driveway, access easements, and other distances in excess of 500 feet between the nearest residential building of the proposed project and road shown on Google Maps will be included in the driving distance.

A single establishment may qualify for points under a maximum of two categories.

## 2. PUBLIC TRANSPORTATION

1 point for being located within .3 miles walking distance of a bus/transit stop meeting the following:

- in service as of the preliminary application date,
- at a fixed location, and
- served by a public transportation system six (6) days a week, including for ten (10) consecutive hours on weekdays.

### 3. AREA EMPLOYMENT

Up to 10 points based on the number of jobs paying between \$1,251 and \$3,333 per month in a two-mile radius for Urban counties, five-mile radius for Suburban counties and ten-mile radius for Rural counties, as displayed on the U.S. Census Bureau's OnTheMap tool for the Longitudinal Employment Household Dynamics database. The Authority will use the most current year available as of the preliminary application deadline.

Applications will earn points as follows:

- 10 points for at least 5,000 jobs.
- 8 points for 4,000 to 4,999 jobs.
- 6 points for 3,000 to 3,999 jobs.
- 4 points for 2,000 to 2,999 jobs.
- 2 points for 1,000 to 1,999 jobs.

### 4 USDA RURAL

5 points for being located entirely within rural areas as defined by USDA (using the link below) as of the preliminary application deadline:

<https://eligibility.sc.egov.usda.gov/eligibility/welcomeAction.do?pageAction=sfp&NavKey=property@12>

## B. Land Donation or Ground Lease

5 points if a local government, school district or entity who received the property from a local government owns the proposed project real estate as of the preliminary application deadline and the application shows no more than either \$5,000 in the cost line-items for land and buildings or \$100 per year for a ground lease. The local government, school district or entity who received the property from a local government must have owned the real estate since at least July 31, 2025 and not have purchased or received any portion from a Principal or a related party.

## C. Affordability

Applications will earn 10 points based on an agreeing to comply with the applicable limits in the matrix below. In order to receive points, the application must reflect one set-aside election (average income or “original” minimum set-aside (i.e. 40% at 60% or 20% at 50%)) and meet the criteria below for the selected set-aside.

- For average income, the percent shown is the average AMI among the units’ designations.
- For an original minimum set-aside (40% at 60% or 20% at 50%), at least 20% of the units must be affordable to and occupied by households at the AMI shown.

County Income Level	MINIMUM SET-ASIDE ELECTION	
	Average Income	Original
High	54%	30%
Moderate	56%	40%
Low	58%	50%

The county income levels are as follows:

- High- Beaufort; Berkeley; Charleston; Dorchester; Greenville; Lancaster; Lexington; Richland; York

- Moderate- Aiken; Anderson; Calhoun; Chester; Darlington; Edgefield; Fairfield; Florence; Georgetown; Horry; Kershaw; Oconee; Pickens, Spartanburg; Saluda; Sumter; Union
- Low- all others

Any units targeted to 20% AMI for purposes of the Supportive Housing criteria may also count towards the requirements of this section. If a reduction in rents or extension of affordability period results in the development becoming financially unfeasible, the Authority may modify elections during underwriting. The Application will not receive points as originally requested.

2. 10 points if the application includes a notarized letter signed by the proposed owner of the property affirming a knowing and voluntary waiver of the right to request a qualified contract from the Authority for the duration of the extended use period.

## D. Affordable Housing Shortage

1. 10 points to a project that is located in a county that did not receive a new construction 9% LIHTC award in the previous fifteen funding cycles
2. 7 points to a project that is located in a county that did not receive a new construction 9% LIHTC award in the previous ten funding cycles
3. 5 points to a project that is located in a county that did not receive a new construction 9% LIHTC award in the previous five funding cycles; or
4. 3 points to a project that is located in a county that did not receive a new construction 9% LIHTC award in the previous three funding cycles

## E. Sustainable Building

Applications will earn 5 points for committing to meet green and energy efficiency sustainable building requirements for one of the following sustainable building certifications:

- Enterprise's Enterprise Green Communities certification program (following Enterprise Green Communities protocol under the guidance of an Enterprise Qualified TA provider)
- US Green Building Council's LEED for Homes certification program
- Home Innovation Research Lab's National Green Building Standard, meeting Bronze level or higher;
- Southface Energy Institute and Greater Atlanta Home Builders Association's EarthCraft certification programs, based on development type
- High Performance Building Council of the BIA of Central SC, Certified High Performance (CHiP) HOME Program

The application must include a certification from a responsible green and/or energy professional affiliated with the certifying party selected that the project will meet such requirements.

## F. Leveraging

1. Applications may earn up to 6 points for documented support from a source listed below.
2. Only the following sources of support qualify for the additional points:
  - a. HOME or Community Development Block Grant (CDBG) funds;
  - b. established local government housing development program

- c. public foundation funds from an affiliate of a local government or health care institution;
- d. the documented cost of infrastructure improvements or amenities funded in full by a governmental entity that are located on or shares a property line border to the project site that will serve the tenants and which will be constructed after application submission and completed prior to the development placing in service; and/or;
- e. other support approved by the Authority in response to a request submitted at least 30 days in advance of the application deadline.

#### Funding or financial support

- may be appropriated directly by a public entity and/or awarded by a non-profit organization financially supported by a local government, such as a local housing trust fund;
  - must be from an independent third party not affiliated with any member of the Development Team (the Authority will determine affiliations based on relationships between the parties in previously awarded projects and other common interests).
3. The application must list the source(s) as a loan(s) (other than (2)(d)) and include an executed commitment letter reflecting a term of at least twenty (20) years and an interest rate less than or equal to the long-term applicable federal rate (compounded monthly) in effect for the month prior to the full application deadline as shown on <https://www.novoco.com/resource-centers/affordable-housing-tax-credits/2023-applicable-federal-rates>

For subsection (2)(d), the application must include a signed letter from the local government (or other public entity) itemizing the waived fees and an affirmation that these fees would have been charged in the absence of the arrangement.

4. Applications will earn points based on the total amount or value of support committed per low-income unit (excluding an employee/manager's unit):
- 6 points for at least \$10,000
  - 5 points for between \$8,000 and \$9,999
  - 4 points for between \$5,500 and \$7,999
  - 3 points for between \$3,500 and \$5,499
  - 2 points for between \$2,000 and \$3,499
  - 1 point for between \$1,000 and \$1,999

## G. Other Credits

5 points for qualifying and utilizing any of the following:

- Historic Tax Credit (Federal)
- Certified Historic Structure Credit (SC)
- Textiles Rehabilitation Credit (SC)
- Abandoned Building Revitalization Credit (SC)
- Brownfields Cleanup Credit (SC)

## H. Supportive Housing

- 5 points for agreeing to target ten percent (10%) of the total units to persons with disabilities and either
- designating such units as affordable to and occupied by tenants with incomes up to 30% AMI and rent capped at 20%, or

- securing a commitment of federal project-based rent assistance (converting vouchers).

Households with only a disability source of income (such as Supplemental Security Income) will be eligible for the 30% AMI units. Conversion of the disability source of income to permanent Social Security Retirement Income is acceptable.

The purpose of this provision is for households referred from a state-coordinated system to live in LIHTC properties. All parties involved (owners, managers, compliance staff) should make interpretations which promote such a result whenever possible and reasonable.

One or more service providers, as coordinated by state authorities, will refer households. For a period of sixty (60) days after the initial rent-up period begins the owner will establish a preferential leasing opportunity for referrals and thereafter will maintain a separate waiting list.

## IV. TIE BREAKER CRITERIA

The Authority will use following the factors in the order listed to break a tie for new construction applications.

- A. An application would be all of the Development Team's only award while the tying application(s) would be all of the Development Team's second or third.
- B. The application in the county with the least 9% LIHTC awards in the previous three funding cycles.
- C. The application with the highest amount of funding per unit eligible for points under Section III(F).
- D. The development is located in area that has a concerted community revitalization plan (CRP). The plan must be included in the application submission. The plan must meet the criteria below:
  1. Within 10 years of the preliminary application deadline, a local government formally adopted a plan to revitalize a defined geographic area containing the proposed site;
  2. The local government certifies that no Principal initiated the CRP being adopted (other than a public housing authority);
  3. Completing the development proposed in the application would contribute to one or more if the CRP's stated goals; and  
The local government has made or is committed to making specific investments in non-housing infrastructure, amenities, or services beyond the proposed development.
- E. Projects providing for tenant ownership at the end of the initial fifteen (15) year compliance period. The application must include a conversion plan including all homebuyer counseling programs to be provided along with the financial procedure that will be used to transfer the rental units into homeownership.
- F. If projects remain tied after all above tie breakers have been applied, the Authority will utilize a lottery.

## V. EVALUATION OF REHABILITATION APPLICATIONS

The Authority will evaluate rehabilitation applications comparatively based on the following criteria.



A. Preventing of the conversion of units to market rate and/or the loss of government housing resources, specifically properties:

- 10 points for developments which the owner is eligible to request a qualified contract currently;
- 10 points for developments with a federal or rural development project-based assistance contract on at least 90% of the units reflecting a remaining term of less than three (3) years;
- 5 points for developments which the owner is eligible to request a qualified contract within the next two (2) years; or
- 5 points for developments with a federal or rural development project-based assistance contract on less than 90% of the units reflecting a remaining term of less than three (3) years.

B. The extent of physical distress, particularly with major systems, accessibility, and/or life, health and safety features, as informed by the Physical Needs Assessment and determined by the Authority. Failure to properly maintain the buildings will not enhance an application's likelihood of award if a member of the current owner's organizational structure or a related party will remain part of the new ownership.

1 point for each of the following systems being replaced (max. 9 points) – roof, HVAC, flooring, windows, hot water heaters, tubs/showers, kitchen cabinets and countertops, ranges and refrigerators.

C. Up to 3 points for developments placing in service in the time periods below:

- 1 point for developments in years 21 – 25
- 2 points for developments in years 26 – 30
- 3 points for developments in years 31+

This time is determined by the most recent placed in service date.

DD1 point if the development is located within an area covered by a Concerted Community Revitalization Plan. The plan must meet the criteria below:

1. Within 10 year of the preliminary application deadline, a local government formally adopted a plan to revitalize a defined geographic area containing the proposed site;
2. The local government certifies that no Principal initiated the CRP being adopted (other than a public housing authority);
3. Completing the development proposed in the application would contribute to one or more if the CRP's stated goals; and
4. The local government has made or is committed to making specific investments in non-housing infrastructure, amenities, or services beyond the proposed development.

E. If applications remain tied based on the above criteria, the Authority will utilize the distance to amenities points listed in Section III(A)(1) as the tie breaker.

# APPENDIX C2 – TAX-EXEMPT BONDS

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## I. OVERVIEW

Developments proposed for financing by private activity bonds may be eligible to receive 4% LIHTCs if eligible to receive a LIHTC allocation under the QAP for the year in which the application for bond financing is filed with the Authority. The Authority will issue a preliminary, non-binding response to an application for the 4% LIHTC stating whether the development is eligible. After the development places in service, the owner will submit a Placed-in-Service (PIS) application.

## II. CRITERIA

### A. Application Process

The Authority will accept preliminary and full applications for tax-exempt bonds/4% developments in accordance with the schedule published on the Authority's website.

At full application the Total Development Costs may not vary more than five percent (5%) from preliminary application.

### B. Requirements

All developments must meet all threshold criteria in the QAP, except as modified by the following:

#### 1. SCATTERED SITE

Scattered site developments are eligible if the development meets all the following:

- a. All buildings must be under the ownership of one entity.
- b. All units must be managed by one management entity.
- c. All buildings must be developed under one plan of financing and considered a single development by all funding sources.
- d. The development must be appraised as a single proposed development.
- e. Each noncontiguous parcel must be located within the same county.
- f. Each noncontiguous parcel must contain at least four (4) units per parcel.

#### 2. PORTFOLIO TRANSACTIONS

Applications pooling together multiple properties for acquisition/ rehabilitation under one bond issuance must be:

- a. separate for each property, and include an appraisal for that single property;
- b. developed under one issuance plan of bond financing; and
- c. entirely managed by one management entity.

Each portfolio transactions will count as one application in reference to application and award limit requirements.

#### 3. REQUIRED DEVELOPMENT EXPERIENCE FOR HUD SECTION 18 OR RAD CONVERSIONS

An application proposing to convert public housing developments through the HUD Section 18 or Rental

Assistance Demonstration (RAD) programs, may request a waiver of the required development experience if the Development Team contracts for the services of an LIHTC consultant who has experience on previous HUD Section 18 or RAD conversions.

#### **4. SIZE REQUIREMENTS**

The maximum number of units for a new construction application is two hundred (200). The minimum number of units per application is seventy (70), this number can be achieved by the development itself, scattered sites or portfolio transactions.

#### **5. MAXIMUM LIHTCS PER UNIT**

There is no maximum amount of federal LIHTCs. Developments needing State Tax Credit will be limited to the amount needed to supplement, but not supplant the federal LIHTC and must be limited to an amount necessary only to achieve financial feasibility of the development. See Appendix C-3 for State Tax Credit requirements.

#### **6. AUTHORITY-ADMINISTERED HOME FUNDING**

Tax exempt bond developments are not eligible to apply for Authority HOME funds.

#### **7. DEVELOPER FEE**

For both new construction and rehabilitation developments, developer fee is limited to the lesser of

- a. \$5 million;
- b. 15% of Total Development Costs less Land, Project Consultant Fees, Developer Fees, Developer Overhead, Other Developer Costs and Reserves; or
- c. \$30,000 per unit

The deferred portion of the developer fee may not exceed fifty percent (50%) of the total at application submission. See Deferred Developer Fee section in the QAP for additional requirements regarding the Deferred Developer Fee.

#### **8. APPLICATION AND AWARD LIMITATIONS**

- a. A Development Team may submit up to three (3) full applications and four (4) preliminary applications per each funding cycle
- b. The Authority will not award more than two (2) applications per funding cycle to any member of the Development Team.
- c. The Authority will not award more than two (2) new construction applications per county listed as Urban and will not award more than one (1) new construction application per county listed Rural. The Public Housing Authority set-aside will be limited to one (1) award per county.

Urban: Aiken, Anderson, Beaufort, Berkeley, Charleston, Dorchester, Greenville, Horry, Lancaster, Lexington, Richland, Spartanburg and York,

Rural: all other counties

- d. The Development Team must request ceiling allocation that will be the maximum of thirty percent (30%) of the aggregate basis or permanent supportable debt.

## C. Set-Asides

The Authority will place Application for tax-exempt bonds/4% developments in one of the set-asides described below.

The Authority will award bond ceiling starting with the eligible application earnings the selection criteria ranking within each of the set-asides and continuing in descending order through the last application that can be fully funded within the range of bond ceiling available in each of the set-asides. The Authority may exceed these limits in the event of inadequate demand among eligible applications which would prevent fully awarding the state's available resources.

1. New Construction (40%)  
Developments underwritten at the time of application without any type of project based assistance.
2. Rehabilitation (30%)
3. Public Housing Authority (30%)

## D. Other Requirements

All tax-exempt bond developments will be subject to review of the Authority's Financial Advisor. The review may result in the Authority requesting changes.

All tax-exempt bond developments must meet all criteria in the 2026 Low-Income Housing Tax Credit Manual, except the following:

- Reservation Certificates
- Carryover Allocations
- Verification of 10% Expenditure

All tax-exempt bond developments requiring South Carolina State LIHTCs must meet all criteria in Appendix C3.

State law requires the ranking determination to be based on highest value and greatest public benefit. The ranking criteria below has been adopted by the Authority and the Joint Bond Review Committee in accordance with Act 202.

SC Housing will maximize the federal LIHTC allocation, determine if STC is needed for financial feasibility, and will then rank the eligible projects based on:

- State resources per heated residential square foot
  - This criterion will rank projects from lowest to highest, based on a calculation of state resources (bond ceiling and state tax credit) per heated residential square foot (i.e., excluding common areas), to demonstrate the most efficient use of state resources for the portion of total project costs applicable to actual tenant housing.
- State resources per bedroom
  - This criterion will rank projects from lowest to highest, based on a calculation of state resources per bedroom, to demonstrate the most efficient use of state resources for the number of families the project will house.

- State resources per dollar of total project costs
  - This criterion will rank projects from lowest to highest, based on a calculation of state resources to total project costs to demonstrate the most efficient investment of state resources in the project overall.
- State resources per potential tenant
  - This criterion will rank projects from lowest to highest, based on a calculation of state resources per potential tenant to demonstrate the most efficient use of state resources for the number of potential residents the project will house.

A 30% adjustment to state resources will be made as a ranking consideration for projects located in USDA-designated rural areas. A 10% adjustment to state resources will be made for new construction units, as a ranking consideration for projects providing an overall increase in affordable housing. These adjustments apply for the sole purpose of establishing project rankings.

Total state resources will include any amount of state ceiling, any applicable state tax credits, and any other state resources and incentives as are germane and applicable to the project.

Tiebreakers:

1. Allocation of State Housing Tax Credit to the project that could be accommodated within the limitation in the event the other project could not.
2. Allocation to a project located within a designated rural area if the other project is not.
3. Allocation determined solely by the relationship of total state resources to the number of tenants the project is expected to serve, as a determinant of greatest public benefit.

# APPENDIX C3 – STATE LIHTC

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III. RANKING .....	3
IV. DETERMINATION AND ELIGIBILITY STATEMENT .....	4

## I. GENERAL REQUIREMENTS

### A. Projects must comply with all of the following for owners to initially claim the state tax credit (STC).

1. Consists of one or more building(s) qualified for federal LIHTC under Internal Revenue Code Section 42.
2. All buildings placed in service after January 1, 2020 and before December 31, 2030.
3. Has restricted rents that do not exceed 30% of income for at least
  - 40% of units occupied by households with incomes of 60% or less of the median income, or
  - 20% of units occupied by households with incomes of 50% or less of the median income.
4. The owner provides a report (Report) to SC Housing detailing
  - how the STC will benefit the tenants (including, but not limited to, reduced rent),
  - why the STC is essential to the financial feasibility of the project, and
  - provide evidence of local support.

In the interest of timely implementation, as of these policies being issued there is no prescribed Report format. Instead owners submit relevant documentation and staff may follow up.

5. Application must request the maximum amount of federal LIHTC before requesting STC. STCs are only meant to be the last resource in the application and only meant to cover any gap remaining after all other sources have been maximized. SC Housing reserves the right to increase the amount of federal tax credits requested.
6. Public Hearing was conducted no less than ten business days from public notice and community was given no less than ten days to provide comment to SC Housing.
7. Receives an Eligibility Statement from SC Housing.
8. Those awarded STCs also must comply with any applicable SC Housing Bulletin(s) and decisions made during application review.

### B. Requesting the STC

1. The Authority will only award STCs to developments with an applicable fraction of 100%.
2. Application must request the maximum amount of federal LIHTC before requesting STC. STCs are only meant to be the last resource in the application and only meant to cover any gap remaining after all other sources have been maximized.
3. Developer may only submit one application per project.
4. Applications listing STC as a source will be ineligible if there is an insufficient amount of STC remaining.
5. Minimum STC request is \$300,000 unless the requested is supported by a syndicator or investor letter of interest noting their willingness to purchase at the specific lower amount.



- C. Claiming the STC each year during the credit period depends on the project remaining in compliance with Sections I(A)(1) and I(A)(3) above plus all other applicable LIHTC requirements.
- D. SC Housing will issue Eligibility Statements and monitor for noncompliance; it has no role in assessing specific taxpayers' ability to reduce tax liability in any calendar year. Owners will need to consult with their own tax professionals.

## II. STC PROCESSES

- A. All applications will be reviewed and scored according to the current years Qualified Allocation Plan.
- B. For developments utilizing the federal 9% LIHTC, SC Housing will underwrite/review the top scoring applications that will exhaust the federal 9% LIHTC limit. Of the top scoring applications, SC Housing will determine if any of those applicants requested STCs. Of those applications, SC Housing will determine if:
  - the application is made for a project to be located in a USDA-designated rural area;
  - STC is needed for financial feasibility;
  - the application has local support; and
  - the application is receiving the maximum federal LIHTC allocation.
- B. SC Housing will conduct a public hearing no less than ten business days from public notice and community will be given no less than ten days to provide comment to SC Housing.
- C. For 9% applications, allocations of STC will not exceed \$8 million, as adjusted per item II.E below and in accordance with the state statute. At a minimum, fifty percent (50%) will be made available for allocation to projects located in rural areas only.
- D. For Tax-Exempt Bond applications, allocations of STC will not exceed \$12 million, as adjusted per item II.E below and in accordance with state statute.
- E. Any unused portion of the allocation will be deemed to be unallocated and will be made available for allocation in the following year pursuant to the provisions of SC Code Section 12-6-3795(B)(5).

## III. RANKING

State law requires the ranking determination to be based on highest value and greatest public benefit. The ranking criteria below has been adopted by the Authority and the Joint Bond Review Committee in accordance with Act 202.

SC Housing will maximize the federal LIHTC allocation, determine if STC is needed for financial feasibility, and will then rank the eligible projects based on:

- State resources per heated residential square foot
  - This criterion will rank projects from lowest to highest, based on a calculation of state resources (bond ceiling, if applicable and state tax credit) per heated residential square foot (i.e., excluding common areas), to demonstrate the most efficient use of state resources for the portion of total project costs applicable to actual tenant housing.

- State resources per bedroom
  - This criterion will rank projects from lowest to highest, based on a calculation of state resources per bedroom, to demonstrate the most efficient use of state resources for the number of families the project will house.
- State resources per dollar of total project costs
  - This criterion will rank projects from lowest to highest, based on a calculation of state resources to total project costs to demonstrate the most efficient investment of state resources in the project overall.
- State resources per potential tenant
  - This criterion will rank projects from lowest to highest, based on a calculation of state resources per potential tenant to demonstrate the most efficient use of state resources for the number of potential residents the project will house.

A 30% adjustment to state resources will be made as a ranking consideration for projects located in USDA-designated rural areas. A 10% adjustment to state resources will be made for new construction units, as a ranking consideration for projects providing an overall increase in affordable housing. These adjustments apply for the sole purpose of establishing project rankings.

Total state resources will include any amount of state ceiling, any applicable state tax credits, and any other state resources and incentives as are germane and applicable to the project.

Tiebreakers:

1. Allocation of State Housing Tax Credit to the project that could be accommodated within the limitation in the event the other project could not.
2. Allocation to a project located within a designated rural area if the other project is not.
3. Allocation determined solely by the relationship of total state resources to the number of tenants the project is expected to serve, as a determinant of greatest public benefit.

## IV. DETERMINATION AND ELIGIBILITY STATEMENT

- A. SC Housing will issue a STC Determination of Project Eligibility based on
  - the underwriting of the application
  - the financial feasibility;
  - its consideration of local support
- B. After being placed in service, if the project remains in compliance with all applicable conditions and requirements, SC Housing will issue an Eligibility Statement along with the Form(s) 8609.

# APPENDIX E

## 2026 LOW-INCOME HOUSING TAX CREDIT MANUAL

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All deadlines listed herein are for 5:00 PM Eastern Standard Time and fall to the next business day if it otherwise would occur on a holiday or weekend.

## **I. RESERVATION/CARRYOVER ALLOCATION PROCEDURES (9% ONLY)**

Any reservation or carryover allocation obtained on the basis of false or misleading information shall be void.

### **A. Reservation Certificates**

The Authority will mail Reservation Certificates to all funded developments upon completion of the competitive scoring process. To acknowledge acceptance of the reservation of LIHTCs, Owner must execute and return the Reservation Certificate and pay all fees then due within ten (10) business days of receipt. The date of the Reservation Certificate is the “Reservation Date.”

Once all Reservation Certificates have been executed and returned, the LIHTC Awards List will be released and posted on the Authority’s website.

Issuance of a Reservation Certificate does not guarantee that the development will receive an allocation of LIHTC in the amount stated, or at all.

Any violation of the terms and conditions of the Reservation Certification and/or an untimely submission of documentation referenced in the Reservation Certificate may result in its cancellation.

### **B. Carryover Allocations**

Owners seeking a Placed-In-Service (PIS) allocation the year in which the reservation was made must submit a PIS application on or before the second Monday in December. Developments with a reservation of LIHTC that will PIS after December 31 of the reservation year must submit an Application for a Carryover Allocation to the Authority no later than the date specified in the Reservation Certificate.

The Authority will send a Carryover Agreement for signature. The Owner must return the original documents by the due date indicated.

## **II. VERIFICATION OF 10% EXPENDITURE (9% ONLY)**

The Authority requires owners meet the Verification of Ten Percent Expenditure (10% Test) no later than eleven (11) months after the Carryover Allocation date. The Authority may permit an extension of this date only under circumstances beyond the Owner’s ability to control. In any event, the Authority may not grant an extension longer than twelve (12) months after the Carryover Allocation date.

The 10% Test application is due to the Authority within three (3) weeks after the 10% Test deadline. Failure to submit by the due date may result in the cancellation of the LIHTC award.

If any of the required documents are missing/incomplete, the following will apply:

- Prior to the Application deadline – the missing/incomplete document(s) may be submitted without penalty.

- After the Application deadline – the missing/incomplete document(s) may be submitted upon payment of the missing document fee.
- If the missing/incomplete documents are not corrected and resubmitted to the Authority within seven (7) business days following the notification, the development may forfeit its allocation of LIHTCs.

### III. PROGRESS MONITORING

Applicable to all projects awarded LIHTCs.

#### A. Progress Reports and Inspections

The owner must submit a quarterly Exhibit L Progress Report that accurately describes the status of the development. The first (1<sup>st</sup>) report will be due April 7 of the calendar year following the Reservation/Carryover. Subsequent reports are due July 7, October 7 and January 7 thereafter until the development submits the placed-in-service application.

Developments will be subject to four (4) construction progress inspections during the construction phase (25%, 50%, 75%, and 100%). The 100% inspection must be requested within sixty (60) days of receiving the Certificate of Occupancy on the last building completed.

#### B. Progress Deadlines

The Authority may grant an extension of the deadlines below for an extension fee. All extension requests must be in writing and submitted not less than one (1) week prior to the deadline along with the required fee. The Authority will only accept and grant extensions for individual categories, not an overall blanket extension for all categories.

#### 1. DEVELOPMENTS WITH A 9% TAX CREDIT ALLOCATION AT 12 MONTHS

The following documents are due not later than twelve (12) months after the Reservation Date:

- Final architect certified development plans and specifications. Final plan and specification requirements are outlined in Appendix B Development Design Criteria.
- The Owner entity must have title to the land as evidenced by a copy of the recorded deed and/or land lease.
- Geotechnical Soil Report(s):
  - All new construction developments and rehabilitation projects adding a new building must submit a complete site-specific Geotechnical soil report and boring site plan not more than one (1) year old at the time of full application.
  - The soil report and boring site plan must reflect the results of laboratory test conducted.
  - The report must be prepared by a registered professional or a certified testing agency with a current license to practice in the State of South Carolina.
- A copy of the executed construction contract.
- A certified copy of the executed, recorded, FINAL construction mortgage document with the recorder's clock mark date stamp showing the date, book, and page number of recording.
- The original executed and recorded Restrictive Covenants (if applicable).

- The executed binding commitment for syndication.

## 2. DEVELOPMENTS WITH A 9% TAX CREDIT ALLOCATION AT 15 MONTHS

Not later than fifteen (15) months after the Reservation Date:

All developments must be under construction. New construction developments must have all footings or a monolithic slab in place as evidenced by photographs submitted with a Progress Report certified by the development architect or engineer. Rehabilitation developments must have begun actual rehabilitation of the units, as evidenced by photographs submitted with a Progress Report certified by the development architect. Rehabilitation and new construction must be continuous and progressive from this date to completion.

## 3. DEVELOPMENTS WITH A BOND CEILING ALLOCATION

The following documents will be due as listed on the TEB Schedule posted on the Authority's website at the time of application:

- Final architect certified development plans and specifications. Final plan and specification requirements are outlined in Appendix B Development Design Criteria.
- The Owner entity must have title to the land as evidenced by a copy of the recorded deed and/or land lease.
- Geotechnical Soil Report(s)
  - All new construction developments and rehabilitation projects adding a new building must submit a complete site-specific Geotechnical soil report and boring site plan not more than one (1) year old at the time of full application.
  - The soil report and boring site plan must reflect the results of laboratory test conducted.
  - The report must be prepared by a registered professional or a certified testing agency with a current license to practice in the State of South Carolina.
- A copy of the executed construction contract.
- A certified copy of the executed, recorded, FINAL construction mortgage document with the recorder's clock mark date stamp showing the date, book, and page number of recording.
- The original executed and recorded Restrictive Covenants (if applicable).
- The executed binding commitment for syndication.

Applicants failing to close within the TEB Schedule timeline may not be eligible to apply in any Authority funding cycles the following year.

## IV. PLACED IN SERVICE ALLOCATION PROCEDURES

The owner must submit a Placed-In-Service (PIS) application and all supporting documentation listed on Exhibit A – Placed in Service Checklist within nine (9) months of the last building placing in service. Applications expecting to claim credits in the current year must submit the PIS application by second Monday in December. Applications not received by this due date may be submitted until the last business day in December of the tax year for which the development expects to claim credits, upon payment of a late delivery fee.

The Authority will review PIS applications in the order received. If the application is incomplete, the following will apply:

- A Missing Document Fee will be assessed per missing item
- If the Authority does not receive the corrected or missing documents and administrative fee within ten (10) business days following December 31, the development may lose its allocation of LIHTCs.

The PIS application must include the Exhibit J-2 as to the actual costs incurred in construction of the project. A Certified Public Accountant must perform an audit and issue an opinion letter in accordance with Generally Accepted Accounting Principles and Generally Accepted Auditing Standards and execute the CPA Certification Form. The development team must certify that all costs have been reported for inclusion in the cost certification.

The certification must include a statement that a final copy of all costs incurred has been reviewed and is in accordance with the requirements of the LIHTC Program, and that after careful review and investigation into the eligible basis, the costs that are not includable have been excluded from the eligible basis. The Authority may require an attorney opinion for costs that are questionable as to their eligibility for LIHTC purposes.

The Authority will use industry standards to determine the total actual allowable cost for construction and may reduce the LIHTC allocation. If either the audit or Authority staff finds that the Contractor's actual allowable costs for construction are less than budgeted costs at application and as amended by any approved change order requests, then the Authority may reduce the eligible basis and decrease the amount of LIHTCs. The Authority assumes no responsibility for determining which costs are eligible.

Once submitted Owners may not modify or resubmit a certification. All underwriting decisions based on the submitted certification are final.

After receipt of a complete PIS application, all units are to be one hundred percent (100%) complete and available for immediate occupancy by the placed in service deadline, as documented by the Certificates of Occupancy or an equivalent provided by the local government entity. Failure to meet either criterion may result in cancellation of the LIHTC allocation.

If the PIS application is complete, the Authority will execute and mail Form 8609(s), but not until the last building in a multi-building development has been placed in service.

## **V. PROJECT CHANGES, TRANSFERS AND RETURN OF CREDITS**

### **A. Material Changes Prohibited**

If, upon the submission of the Carryover Allocation Documents, the 10% Test application or the PIS application, the Authority determines that the development is not substantially the same as described in the original Tax Credit Application, the development may not receive an allocation of LIHTCs.

At all times after award, the owner is responsible for promptly informing the Authority of any changes or alterations which deviate from the final plans and specifications approved at award.

## **B. Transfers**

Neither reservations nor carryovers are transferable without the prior written consent of the Authority.

No change in the makeup or identity of a GP in a partnership or its equivalent in a limited liability company is permitted without the prior written consent of the Authority. Without limitation, this prohibition includes indirect transfers through the admission of any “special limited partner(s)” that leads to the eventual exit of a GP or its equivalent in a limited liability company. LIHTCs allocated to developments whose ownership is altered in violation of this provision shall be subject to revocation by the Authority.

## **C. Return of Credits and Returned Credit Allocation Procedures**

LIHTC allocations may be returned only on a date agreed upon by the Authority and the Owner.

## **D. Recycling Credits**

An owner who received an award of 9% tax credits in the previous funding cycle may request to return those credits and receive an allocation from the current tax credit cycle equal to or less than the amount of the original tax credits awarded. The request must be made in the current calendar year and include payment of the Recycling Credit Fee. An owner may only request to recycle credits one time per development and may not be eligible to submit an application in the next 9% tax credit application round.

Projects seeking additional credits will be required to return the development’s tax credit allocation and re-apply in the next application cycle.

# **VI. COMPLIANCE MONITORING PROCEDURES**

The procedures the Authority will follow in monitoring are outlined in the LIHTC Compliance Monitoring Manual on the Authority’s website. The manual includes but is not limited to procedures that address the following areas: record keeping and record retention; certification and review; on-site inspection; and notification as to noncompliance.

Additionally, all LIHTC developments must comply with the following:

## **A. Mandatory Compliance Training Session for On-Site Management Staff**

Once a development reaches 75% construction completion, the Owner must schedule required attendance at a compliance training session for on-site management staff charged with handling the daily tasks of property management and program eligibility determinations.

## **B. Rent Increases**

Developments cannot increase rent levels without approval from the Compliance Monitoring Department. Rent increases in excess of 5% annually may not be approved.

## **C. Annual Audited Financial Statements:**

All developments, regardless of when funded, must submit audited financial statements and operating



expense information not later than June 1<sup>st</sup> of each year through the appropriate Authority platform. A late delivery fee will be assessed if the audited financial statements and operating expense information is not received by June 1<sup>st</sup> of each year.

## D. Compliance Monitoring Fees:

Compliance monitoring fees are

- subject to change each year, the current QAP will reflect the amount owed per unit for any given year
- due each year through extended use period to include the decontrol period.

## VII. PROGRAM SUSPENSION AND DEBARMENT

- A. The following events may result in suspension from participating for funding from any of the Authority administered programs for a period of three (3) years:
1. Developments that fail to meet the 10% Test by the date specified in the carryover document or place-in-service by the Code deadline.
  2. Developments that fail to close by any deadline thereby allowing carryforward to expire.
  3. Removal of the General Partner or its equivalent in a limited liability corporation. The Authority may make exceptions due to death, bankruptcy, or cessation of business operations.
  4. Providing a false or inaccurate certification.
  5. Failure of a development to remain in compliance with all rules and regulations imposed by the Tax Credit Assistance Program (TCAP) funds or Exchange Program.
  6. Interference with a LIHTC application for which an individual or an entity is not a part of the Development Team.
- B. Any of the following actions may result in the permanent debarment from participating for funding from any of the Authority administered programs:
1. Any Development Team member who provides false or misleading information to the Authority or the Hearing Officer with regard to a development seeking LIHTC, regardless of when such false or misleading information is discovered.
  2. Any partnership formation and/or developer agreement, whether written or otherwise, that attempts to circumvent Authority requirements, regardless of when the violation is discovered.
  3. For nonprofit sponsored developments, breach of the requirement for continuous and ongoing material participation. Debarment applies to the nonprofit and all of its officers and directors.
- C. The Authority may disqualify an application from the current or upcoming application cycle for any of the reasons below.
1. Member(s) of the Development Team or person(s) on behalf of a development team member(s) contacting Board members from the LIHTC preliminary application submission date through the date of award regarding
    - the scoring or evaluation of any applications,
    - interpretation or implementation of the QAP or Appendices, or
    - the award of LIHTCs.

2. Any of the following applies to a member of the Development Team:

- debarment from any federal or state program;
- submission of fraudulent information to the IRS or any federal or state affordable housing program;
- failure to meet a requirement resulting in full recapture of LIHTCs;
- failure to comply with laws governing fair housing and accessibility for persons with disabilities resulting in a U.S. Department of Justice finding;
- default on a loan resulting in foreclosure or deed in lieu of foreclosure that leads to premature termination of a mandatory affordability period\*;
- abandonment or forfeiture of an affordable housing property\*;
- failure to comply with restrictive covenants\*;
- removal or withdrawal as General Partner or Managing General Partner of a LIHTC property\*;
- failure to execute the bond closing by the deadline set in the Authority's Final Resolution\*;
- and/or
- return of LIHTCs to an allocating agency\*.

\*Items denoted with an asterisk are events for which the applicant may request a waiver no later than January 31, 2026.

3. A member of the Development Team is responsible for prior instances of any of the following in the previous ten (10) years without a waiver from the Authority requested no later than January 31, 2026:

- Forms 8823s and/or health and safety issues not cured within the established period;
- default or arrearage of at least three months in an affordable housing mortgage or loan;
- outstanding flags in HUD's 2530 National Participation system;
- deferred maintenance, mold, building code violations or other evidence of poor maintenance at properties monitored by the Authority;
- failure to pay Compliance Monitoring Fees;
- failure to submit rent rolls, annual owner certifications, or other required reporting;
- failure to report to the Authority any common areas, buildings or dwelling units that has been out of service for a period exceeding 30 days due to damage or disrepair; and/or
- failure to notify the Authority of a change in property ownership or management.

D. The Authority may determine other acts that require suspension or debarment. Suspensions or debarments based on such acts not otherwise defined shall be conducted as outlined in the Authority's Debarment and Program Suspension Policy.

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AGENCY: Department of Corrections

SUBJECT: Report of Expenditures  
Comprehensive Security and Maintenance Plan

Proviso 65.30 of the Fiscal Year 2021-22 Appropriations Act, as reauthorized in the Fiscal Year 2025-26 Appropriations Act, permits the Department of Corrections to carry forward certain CARES Act reimbursement funds and directed their deposit into a separate and distinct fund known as the Department of Corrections Security and Maintenance Reserve Fund. The original amount of funding available pursuant to the provisos totaled \$93.026 million.

The provisos permit the Department to expend these funds to meet the maintenance and security needs of the agency for critical repairs, deferred maintenance, renovations, security upgrades, and equipment which are directly related to the safety and security of the public, officers, employees, and inmates. The Department was required to develop a comprehensive security and maintenance plan itemizing the permanent improvement projects and equipment purchases needed to maintain the safety and security of the state's prison system.

In addition to the foregoing, the provisos require the Department to report to the Governor and the Committee expenditures from the fund by September 30 of each fiscal year. In accordance with this requirement, the Department made a timely submission and reported establishment of projects totaling \$91.9 million and \$14.1 million in expenditure activity for Fiscal Year 2024-25.

COMMITTEE ACTION:

Receive the report required by the proviso as information.

ATTACHMENTS:

1. Letter dated September 25, 2025, of Mr. Joel E. Anderson, Interim Director, South Carolina Department of Corrections.
2. Comprehensive Security and Maintenance Plan and Expenditure Activity for Fiscal Year 2024-25.



SCDC

South Carolina Department of Corrections  
"Correctional Excellence Today for a Safer South Carolina Tomorrow"

Henry McMaster | Governor

Office of the Director

Joel E. Anderson | Interim

September 25, 2025

The Honorable Henry McMaster, Governor  
State of South Carolina  
South Carolina State House  
1100 Gervais Street  
Columbia, South Carolina 29201

The Honorable Harvey S. Peeler, Jr.  
Chairman, Capital Improvements Joint  
Bond Review Committee  
111 Gressette Building  
Columbia, South Carolina 29201

The Honorable Bruce W. Bannister  
Vice Chairman, Capital Improvements  
Joint Bond Review Committee  
525 Blatt Building  
Columbia, South Carolina 29201

Catherine O. Hart  
Director of Research, Capital Improvements  
Joint Bond Review Committee  
105 Gressette Building  
Columbia, South Carolina 29201

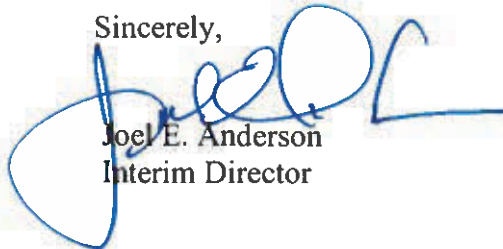
Dear Governor McMaster and Members of the Capital Improvements Joint Bond Review Committee:

In pursuant of the FY24-25 Appropriations Act Proviso 65.30, the Department must provide to the Governor and the Capital Improvements Joint Bond Review Committee a report on the implementation and accumulated expenditures of the Comprehensive Security and Maintenance Plan by September 30 of each fiscal year.

Please accept the following attachments totaling \$14.1 million in expenditure activity for Fiscal Year 2024-25.

Should you have any questions please do not hesitate to contact Dexter Lee, Chief of Staff at 803-896-1731.

Sincerely,



Joel E. Anderson  
Interim Director

Attachments



**Dexter Lee (C013424)**

---

**From:** Lisa Marcum (C046873)  
**Sent:** Friday, September 12, 2025 3:47 PM  
**To:** Dexter Lee (C013424)  
**Cc:** Casey Sternenberg (C068840)  
**Subject:** 51C18000 Projects (COVID) Spent in FY2025

Below is the total spent in FY2025 on the COVID money / projects

9779	Security and Maintenance Upgrades - Institutional Roof Replacement	\$ -	9902.977900.000
9780	Security and Maintenance Upgrades - Relocation of Recreation Yards and Observation Tower Installation	\$ 542,426.56	9902.978000.000
9781	Security and Maintenance Upgrades - Security Electronic Replacement	\$ 1,640,705.02	9902.978100.000
9776	Security and Maintenance Upgrades - Control Room Additions and Cell Lock Replacement	\$ 4,198,821.29	9903.977600.000
9778	Security and Maintenance Upgrades - HVAC, Chiller & Kitchen Boiler Replacement	\$ 4,309,873.56	9903.977800.000
9777	Security and Maintenance Upgrades - Fire Alarm Replacements	\$ 3,494,355.90	9904.977700.000



## Display Annual Values of Control Objects

Details Documents

**FM Area**  
**Fiscal Year**  
**Control Ledger**

SC01 (USD)  
 2025  
 9H



### Hierarchy of Control Objects - Budget Addresses - Posting Addresses

<b>&lt;Several Funded Program Values&gt;</b>	<b>1</b>
9902.977900.000	
9902.978000.000	
9902.978100.000	
9903.977600.000	
9903.977800.000	
9904.977700.000	

Let me know if you need anything else.

Thanks

Lisa Marcum  
Accountant/Fiscal Analyst III  
Division of Budget and Finance  
South Carolina Department of Corrections  
Headquarters Building, Room 224  
4444 Broad River Road  
PO Box 21787  
Columbia, SC 29221-1787  
803-896-2962  
[Marcum.Lisa@doc.sc.gov](mailto:Marcum.Lisa@doc.sc.gov)



**SOUTH CAROLINA**  
DEPARTMENT OF CORRECTIONS  
*Safety, Service, and Stewardship*



# 93 MILLION

PROJECT #

Projected Budget Engineering/Inspection

Contract

Project Total

Current Paid Invoices

Status

## 9776 Security and Maint. Upgrades - Control Room Additions and Cell Lock Replacement

9776-JM-A	Mcormick CI	\$7,852,572.00	\$589,768.00	\$11,986,639.85	\$12,646,214.08	\$1,258,057.86	Under Construction
9776-JM-B	Broad River CI	\$9,243,000.00		\$0.00	\$0.00	\$2,980,535.28	Waiting further progress on Lieber/McCormick
9776-JM-C	Lieber CI	\$7,852,572.00	\$591,244.00	\$10,991,706.78	\$11,896,905.08		Under Construction
9776-JM-D	Evans CI	\$7,852,572.00		\$0.00	\$0.00		Waiting further progress on Lieber/McCormick
TOTAL		\$32,800,716.00	\$1,181,012.00	\$22,978,346.63	\$24,543,019.16	\$6,218,593.14	

## 9777 Security and Maintenance Upgrades - Fire Alarm Replacements

9777-LC-A	Kershaw CI	\$2,679,300.00	\$117,690.00	\$2,060,328.94	\$1,178,018.94	\$648,307.90	Under Construction
9777-LC-B	MacDougall CI	\$900,000.00	\$108,675.30	\$1,013,620.79	\$1,122,296.09	\$663,707.56	Under Construction
9777-LC-C	Evans CI	\$1,965,600.00	\$306,460.00	\$1,897,215.00	\$2,203,675.00	\$2,058,533.14	Under Construction
9777-LC-D	McCormick CI	\$1,649,700.00	\$269,460.00	\$1,908,650.00	\$2,178,110.00	\$1,327,922.38	Under Construction
9777-LC-E	Waterlee CI	\$2,679,300.00	\$180,310.00	\$747,130.00	\$976,248.38	\$692,305.77	Under Construction
9777-LC-F	Manning CI	\$1,778,400.00	\$149,000.00	\$149,000.00	\$149,000.00	\$72,400.00	Out for Bid
9777-LC-G	Leath CI	\$1,673,100.00	\$97,810.00	\$1,383,319.00	\$1,481,129.00	\$75,840.00	Under Construction
9777-LC-H	Livesay CI	\$1,602,900.00	\$60,000.00		\$60,000.00	\$47,700.00	On Hold until Manning Bid Complete
9777-LC-I	Turbeville CI	\$2,621,700.00		\$0.00	\$0.00		Waiting on projects to reassess Budget
TOTAL		\$17,550,000.00	\$1,289,405.30	\$9,010,263.73	\$10,348,477.41	\$5,582,716.75	

## 9778 Security and Maintenance Upgrades - HVAC, Chiller 5 Kitchen Boiler Replacement

9778-LC-A	Lee CI-Replace Admin HVAC	\$1,872,000.00	\$68,610.00	\$68,610.00	\$47,015.00		Waiting on projects to complete to reassess Budget
9778-LC-B	Kirkland CI-SSR Replace HVAC	\$3,510,000.00	\$146,960.00	\$4,841,582.76	\$4,988,542.76	\$4,963,151.50	Completed
9778-LC-C	Headquarters Replace HVAC	\$4,071,600.00	\$98,095.00		\$98,095.00	\$25,109.29	Waiting on projects to complete to reassess Budget
9778-LC-D	Turbeville CI-Replace Chiller&Tower	\$1,755,000.00	\$82,137.00	\$2,220,135.00	\$2,302,272.00	\$2,301,621.00	Project Completed
9778-LC-E	Evans CI-Replace HVAC Housing Units	\$1,325,610.00	\$99,000.00	\$3,815,671.00	\$3,914,671.00	\$3,780,087.87	Under Construction 99% Complete
9778-LC-F	McCormick CI-Replace HVAC Housing Units	\$1,325,610.00	\$89,923.00		\$89,923.00	\$63,521.50	Waiting on projects to complete to reassess Budget
9778-LC-G	Broad River CI-Replace HVAC Housing Units	\$1,326,780.00	\$98,888.00		\$98,888.00	\$69,702.00	Waiting on projects to complete to reassess Budget
9778-LC-H	Tyger River CI-Replace Kitchen Kettles	\$491,400.00	\$24,890.00	\$213,096.08	\$237,986.08	\$235,986.08	Project Completed
9778-LC-I	Turbeville CI-Replace Kitchen Boiler	\$424,476.00		\$0.00	\$0.00		Waiting on projects to complete to reassess Budget
9778-LC-J	Perry CI-Replace Kitchen Boiler	\$245,700.00		\$0.00	\$0.00		Waiting on projects to complete to reassess Budget
9778-LC-KB	Camille Graham CI-Replace Kitchen Boiler	\$245,700.00		\$0.00	\$0.00		Waiting on projects to complete to reassess Budget
9778-LC-KA	Broad River CI-Replace Kitchen Boiler	\$424,476.00	\$13,968.00	\$237,469.00	\$251,437.00	\$242,229.58	Complete-Invoice to be paid
9778-LC-L	Manning CI-Replace Electrical Grid	\$1,565,273.00		\$0.00	\$0.00		Waiting on projects to complete to reassess Budget
9778-LC-M	Lee CI - Replace Boilers	\$0.00	\$74,575.00	\$1,095,349.00	\$1,169,924.00	\$931,309.88	Under Construction 60% Complete
TOTAL		\$18,583,625.00	\$797,046.00	\$12,423,307.84	\$13,220,348.84	\$12,659,733.70	

## 9779 Security and Maintenance - Institutional Roof Replacement

9779-PD-A	Kirkland CI	\$2,925,000.00		\$0.00	\$0.00		Engineering Phase
TOTAL		\$2,925,000.00			\$0.00		

## 9780 Security and Maint. Upgrades - Relocation of Rec. Yard & Tower

9780-PD-A	Lee CI	\$3,750,000.00	\$61,930.00	\$1,970,035.05	\$2,031,965.05	\$2,024,728.56	Complete
9780-PD-B	McCormick CI	\$1,755,000.00	\$2,525.00	\$1,467,292.14	\$1,469,817.14	\$1,464,237.65	Complete



9780-PD-C	Evans CI	\$1,455,000.00	\$3,487.50	\$961,273.63	\$964,761.13	\$964,601.13	Complete
9780-PD-D	Leiber CI	\$1,462,500.00	\$2,587.50	\$616,438.17	\$619,025.67	\$618,745.67	Complete
9780-PD-E	Turbewille CI	\$1,200,000.00	\$2,965.00	\$569,200.00	\$572,165.00	\$358,653.35	On Hold
9780-PD-F	Ridgeland CI	\$1,200,000.00	\$2,965.00	\$745,000.00	\$747,965.00	\$137,450.00	On Hold
TOTAL		\$10,822,500.00	\$76,460.00	\$6,329,238.99	\$6,405,698.99	\$5,568,416.36	
<b>9781 Security and Maintenance Upgrades - Security Electronic Replacement</b>							
9781-JM-A	Kirkland CI	\$292,500.00	\$1,445.00	\$510,684.77	\$512,129.77	\$512,012.27	Complete
9781-JM-B	Lee CI	\$550,000.00	\$1,540.00	\$592,260.00	\$593,800.00	\$592,805.00	Complete
9781-JM-C	Perry CI	\$877,500.00	\$1,540.00	\$546,976.00	\$548,516.00	\$546,976.00	Complete
9781-JM-D	Turbewille CI	\$585,000.00	\$1,540.00	\$499,054.76	\$500,594.76	\$499,599.76	Complete
9781-JM-E	Tyger River CI	\$585,000.00	\$1,685.00	\$777,460.13	\$779,145.13	\$82,587.60	Under Contract Materials/Equipment on order
9781-JM-F	Allendale CI	\$409,500.00	\$1,685.00	\$321,910.34	\$323,595.34	\$321,842.84	Complete
9781-JM-G	Trenton CI	\$350,000.00	\$1,390.00	\$328,295.87	\$329,685.37	\$125.37	Under Contract Materials/Equipment on order
9781-JM-H	Ridgeland CI	\$350,000.00	\$1,540.00	\$442,244.20	\$443,784.20	\$102,724.20	Under Contract Materials/Equipment on order
9781-JM-I	McCormick CI	\$360,000.00	\$6,245.00	\$332,480.00	\$338,725.00	\$5,215.00	Under Contract Materials/Equipment on order
9781-JM-J	Evans CI	\$500,000.00	\$5,860.00	\$177,781.00	\$183,641.00	\$66,861.00	Under Contract Materials/Equipment on order
9781-JM-K	Lieber CI	\$500,000.00	\$5,860.00	\$152,421.00	\$158,281.00	\$2,970.00	Under Contract Materials/Equipment on order
9781-JM-L	Statewide	\$3,942,000.00					
TOTAL		\$9,301,500.00	\$30,330.00	\$4,681,567.57	\$4,711,897.57	\$2,733,719.04	
GRAND TOTAL		\$91,983,341.00	\$3,374,253.30	\$55,422,719.76	\$59,229,441.97	\$32,763,178.99	

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AGENCY: Department of Administration  
Capital Budget Office

SUBJECT: Comprehensive Permanent Improvement Plan

Section 2-47-55 of the South Carolina Code of Laws requires all state agencies responsible for providing and maintaining physical facilities to submit a Comprehensive Permanent Improvement Plan.

The Plan outlines agencies' permanent improvement activities for the upcoming five years. Year 1 of each agency's Plan includes projects that the agency expects to initiate in the upcoming year, for which funding is reasonably expected to be available. Years 2 through 5 include projects planned by the agency, generally without current or certain sources of funding, which may include a request by the agency for state appropriation, other agency and non-state sources, or some combination thereof.

The Department of Administration has compiled and submitted a report summarizing the 2025 Plan submissions for all agencies, as well as a listing of the individual projects for each agency by year and source of funding. The report has been distributed to Committee members under separate cover. In addition, detailed submissions are available to members of the Committee upon request.

The report and detailed submissions are publicly available at the Department of Administration's website at <https://admin.sc.gov/services/budget/planning-capital-improvements>, under the section entitled "Comprehensive Permanent Improvement Plan."

COMMITTEE ACTION:

Receive this report as information.

ATTACHMENTS:

1. Letter dated November 12, 2025, of Ms. Ashlie Lancaster, Director, Division of Facilities Management and Property Services, South Carolina Department of Administration.

AVAILABLE:

1. State of South Carolina 2025 Comprehensive Improvement Plan for Plan Years 2026 through 2030.
2. Detailed Agency Submissions, 2025 Comprehensive Permanent Improvement Plan for Plan Years 2026 through 2030.

November 12, 2025

Catherine O. Hart  
Director of Research  
Joint Bond Review Committee  
Gressette Senate Office Building  
1101 Pendleton Street  
Columbia, South Carolina 29201

Dear Ms. Hart,

Submitted herewith is the 2025 Comprehensive Permanent Improvement Plan as prescribed by Section 2-47-55 of the SC Code of Laws, which provides that all state agencies responsible for providing and maintaining physical facilities are to submit a Comprehensive Permanent Improvement Plan to the Joint Bond Review Committee and the State Fiscal Accountability Authority.

This report has been compiled by the Division of Facilities Management and Property Services of the South Carolina Department of Administration from agency submissions. The complete and full details will be placed online after the December 3, 2025 Joint Bond Review Committee meeting, and may be accessed on the Department's website at [Planning for Capital Improvements | Department of Administration](#).

Sincerely,

*Ashlie Lancaster*

Ashlie Lancaster  
Division of Facilities Management and Property Services



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AGENCY: South Carolina Office of Resilience

SUBJECT: Pee Dee Basin RMS Initiative  
Disaster Relief and Resilience Reserve Fund Reimbursement

Proviso 118.19(B)(61) of the Fiscal Year 2023-24 Appropriations Act made provision for an appropriation of \$200,000,000 to the Disaster Relief and Resilience Reserve Fund established within the South Carolina Office of Resilience.

On March 26, 2025, the Committee reviewed the Office's request to transfer \$17,777,000 from the Disaster Relief and Resilience Reserve Fund to the South Carolina Forestry Commission as matching funds to support a grant of \$50,000,000 under the U.S. Forest Service Forest Legacy Program. The grant was awarded to secure conservation easements across Georgetown, Marion, and Williamsburg Counties in support of the Pee Dee Basin Resource Management Services Initiative. The Initiative was the largest land protection project conducted by a state agency to date and was comprised of acquiring 880 acres of property in Georgetown County adjacent to the Wee Tee State Forest and protecting an additional 61,340 acres pursuant to the conservation easements.

By letter dated September 24, 2025, the Office reported that the Forestry Commission did not have to apply the total approved amount as match and returned \$582,461.89 to the Disaster Relief and Resilience Reserve Fund.

Following the reimbursement, there will remain a balance of \$112,713,698 held in the Disaster Relief and Resilience Reserve Fund.

COMMITTEE ACTION:

Receive as information.

ATTACHMENTS:

1. Letter dated September 24, 2025, of Mr. Benjamin I. Duncan, II, Chief Resilience Officer, SC Office of Resilience and Scott Phillips, State Forester, SC Forestry Commission.



24 September 2025

Via Email Only – [CatherineHart@scsenate.gov](mailto:CatherineHart@scsenate.gov)

Catherine O. Hart  
Director of Research  
Joint Bond Review Committee  
321 Gressette Building  
Columbia, SC 20201

Re: South Carolina Office of Resilience Receipt of \$582,461.89 Return of Funding from SC Forestry Commission's Historic Easement and Acquisition Project of 62,220 acres.

Dear Ms. Hart:

The South Carolina Office of Resilience (SCOR) and the South Carolina Forestry Commission (SCFC), along with the SC Conservation Bank; SC Dept. of Parks, Recreation, and Tourism; SC Dept. of Natural Resources; and other project partners, are pleased to report that the state did not have to utilize all the approved funding for the above project. On 23 Sept 2025, SCFC returned \$582,461.89 to SCOR's Resilience Acquisition sub-fund of the Disaster Relief and Resilience Reserve Fund.

In its March 2025 JBRC meeting, the Committee approved of SCOR transferring \$17,777,000 to SCFC for a historic conservation and acquisition project that protected 62,220 acres in our state. The state funds were a required match for a U.S. Forestry Service Forest Legacy program \$50,000,000 grant. The project is truly a legacy conservation project and is the single largest conservation endeavor ever undertaken by a South Carolina state agency. The covered acreage will be protected in perpetuity. The conservation easement will be monitored by the SC Forestry Commission. The state will have the first right of refusal to purchase any of the easement acres if in the future the owner decides to sell any portion of those properties.

The project complied with FY25 Proviso 117.171. On behalf of all resource agencies and project partners, we appreciate JBRC's understanding and approval of this project. It is a shining example of the outstanding cooperation and high degree of coordination amongst the resource agencies. As important as the return of \$582,461.89 is that the effort resulted in a historic benefit for the citizens of our state.



Sincerely,

A blue ink signature of Benjamin I. Duncan, II, written in a cursive style.

Benjamin I. Duncan, II  
Chief Resilience Officer  
SC Office of Resilience

and

A black ink signature of Scott Phillips, written in a cursive style.

Scott Phillips  
State Forester  
SC Forestry Commission

Cc: Dir. Raleigh West, SCCB  
Dir. Duane Parrish, SCPRT  
Dir. Tom Mullikin, SCDNR

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AGENCY: South Carolina Rural Infrastructure Authority

SUBJECT: Annual Report

Section 11-50-160 of the SC Code of Laws provides among other things that, following the close of each state fiscal year, the South Carolina Rural Infrastructure Authority must submit an annual report of its activities for the preceding year to the Governor and to the General Assembly, and an annual report of any loans or other financial assistance, excluding grants, to the Joint Bond Review Committee.

The report is provided as information to the Committee.

COMMITTEE ACTION:

Receive as information.

ATTACHMENTS:

1. Letter dated October 1, 2025, of Ms. Bonnie Ammons, Executive Director, South Carolina Rural Infrastructure Authority.
2. South Carolina Rural Infrastructure Authority Annual Report Fiscal Year 2024-25.

Harry M. Lightsey III  
Chairman



Bonnie Ammons  
Executive Director

South Carolina  
Rural Infrastructure Authority

October 1, 2025

The Honorable Harvey S. Peeler, Jr.  
Chairman, Joint Bond Review Committee  
105 Gressette Building  
Columbia, SC 29201

Dear Chairman Peeler:

I am pleased to provide the Joint Bond Review Committee with a copy of the SC Rural Infrastructure Authority's FY 25 Annual Report. This report highlights the Authority's critical role in creating foundations for growth in communities across the state.

In FY25, RIA awarded \$61 million in grants and worked to ensure the timely progression of over 200 ongoing grants funded with American Rescue Plan Act dollars. The State Revolving Fund loan program provided \$109 million in low-cost loans. We also continued our focus on customer service and providing viability assistance to small and rural communities.

Thank you for the opportunity to make investments in statewide infrastructure needs that will improve the quality of life and support economic development in the future. If you have any questions, please do not hesitate to contact me.

Sincerely,

A handwritten signature in blue ink, appearing to read "Bonnie Ammons", is written over a light blue rectangular background.

Bonnie Ammons

cc: Catherine Hart, Director of Research, Joint Bond Review Committee





South Carolina  
Rural Infrastructure Authority



# Flowing FORWARD

CREATING FOUNDATIONS  
FOR GROWTH

2024 - 2025  
ANNUAL  
REPORT

## CONTENTS

3	Message from the Executive Director
4	About RIA
5	FY25 Highlights
6	Cumulative Funding Impacts
7	FY25 State Grant Programs
10	FY25 Loan Programs
12	South Carolina Infrastructure Investment Program
14	Small System Viability Initiatives
15	Partnerships



Groundbreaking ceremony for an RIA-funded water improvement project with Joint Municipal Water and Sewer Commission and the Town of Batesburg-Leesville.



# Flowing Forward:

## CREATING FOUNDATIONS FOR GROWTH

To borrow an often-used phrase, water is life. Streams flow through the land sustaining the surrounding flora and fauna. As water infrastructure protects water quality and public health, it also supports homes, schools and businesses. It gives life to a community.

But infrastructure needs are great and improvements are increasingly expensive, making it difficult to operate and maintain services. Communities need a helping hand to not only fill the financial gaps for critical water, wastewater, and stormwater services and improvements, but also to build capacity for future growth and encourage new economic opportunities. Infrastructure is that foundation and evidence has shown that investments in it mean jobs and economic prosperity.

A new study by the University of South Carolina Darla Moore School of Business, in conjunction with American Council of Engineering Companies (ACEC-SC) Infrastructure Works Institute (IWI), offers tangible evidence of the short-term and long-term value that infrastructure can bring to our state's economy. The analysis indicated that RIA's recent investment of almost \$1.5 billion through the SC Infrastructure Investment Program (SCIIP) is having a multiplier effect on jobs, income and gross domestic product (GDP) growth all around the state, with the following estimated impacts:

**3,075**

**Jobs each year between  
FY21 and FY27**

**\$2.4 BILLION**

**Total Economic Output**

Since 2013, RIA has provided nearly \$3 billion in grant and affordable loan resources to help communities modernize their water utilities, build capacity for economic opportunities, and create sustainable solutions. By continuing this momentum through smart investments and collaborative partnerships, we are creating a foundation to put communities and our state in a position to succeed.



*Bonnie Ammons*

**EXECUTIVE DIRECTOR**  
SOUTH CAROLINA RURAL  
INFRASTRUCTURE AUTHORITY

# Board OF DIRECTORS

## Harry M. Lightsey, III

CHAIRMAN

South Carolina Department of Commerce

## The Honorable Michael Gambrell

VICE CHAIRMAN

State Senator

## David E. Anderson

Anderson Brothers Bank

## The Honorable William Clyburn

State Representative

## William Kellahan, Jr.

Kellahan & Associates

## Jasper W. (Jack) Shuler

Retired, ArborOne Farm Credit & South  
Carolina Department of Agriculture

## The Honorable Richard Yow

State Representative

# About

## SOUTH CAROLINA RURAL INFRASTRUCTURE AUTHORITY

### MISSION

To provide resources for strategic investments that will strengthen and modernize critical community infrastructure.

### VISION

All South Carolina communities have the infrastructure necessary to protect public health and the environment as well as lay the groundwork for economic success.



*"The Rural Infrastructure Authority is a trusted partner and a valuable resource in our efforts to boost sustainable growth opportunities across the state."*

— HARRY M. LIGHTSEY, III  
RIA BOARD CHAIRMAN



# FY 25 Highlights

99

Projects Funded

121

Grant Requests

\$195 MILLION

Grants & Loans

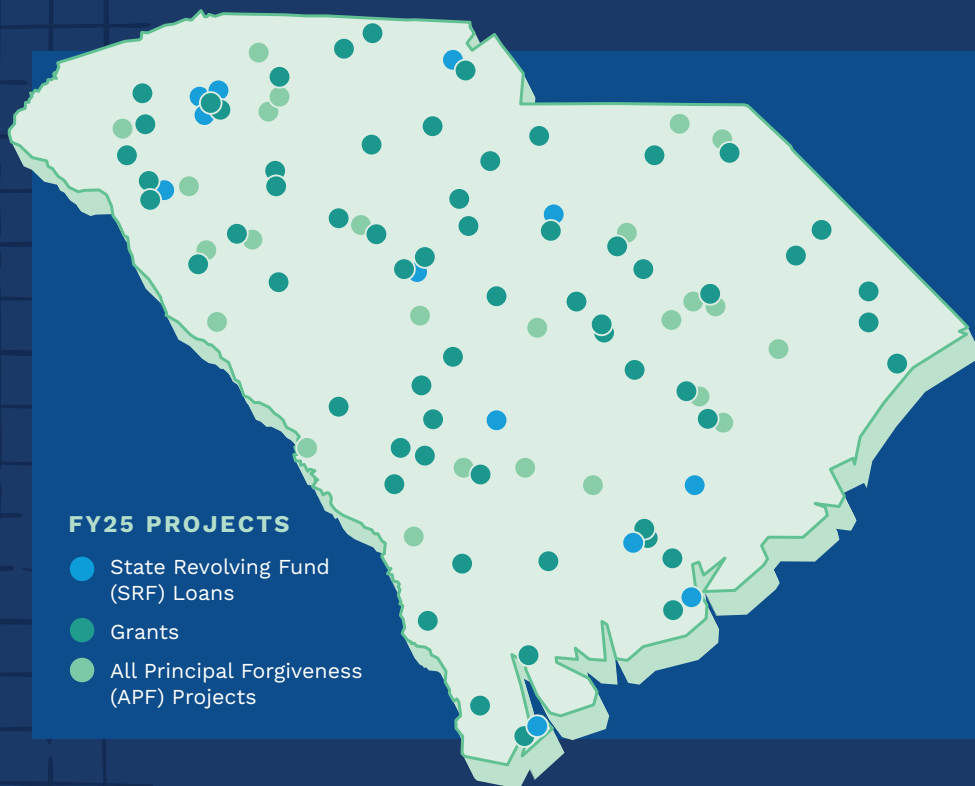
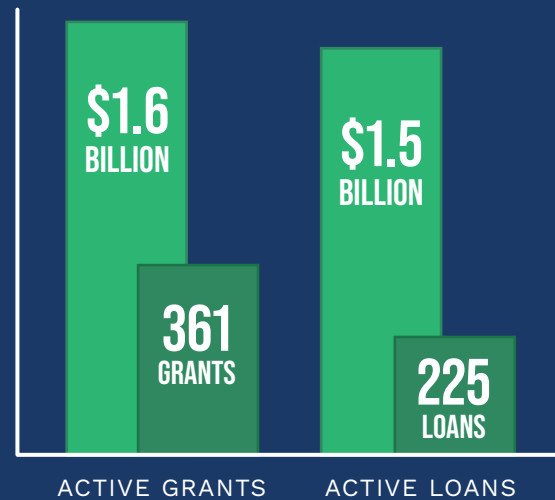
\$94 MILLION

Leveraged

39 COUNTIES

Impacted

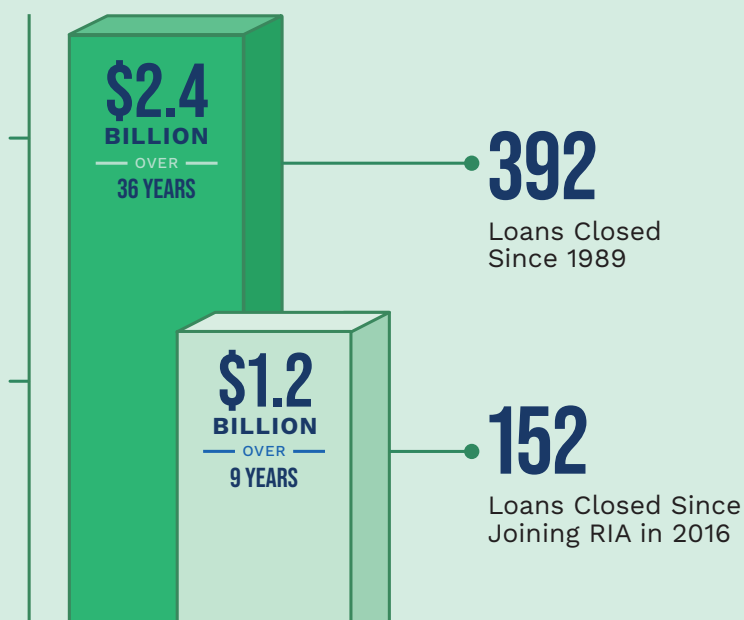
## PROJECT MANAGEMENT



## CUMULATIVE

# Funding Impacts

## STATE REVOLVING FUND LOANS



## RIA GRANTS

Since 2013

# 832

Grants

## \$1.8 Billion

Awarded

# 13,211

Proposed Jobs

## \$4.3 Billion

Proposed Capital Investment

## GRANT PERFORMANCE AGREEMENTS

Most RIA economic infrastructure projects expand capacity and prepare communities for opportunities that result in new jobs and investment. Less than one-third of economic infrastructure projects require a performance agreement with an employer, which includes a commitment to create new jobs, typically within five years.

	CLOSED	IN PROCESS
Performance Agreements	25	11*
Grant Funding	\$9.5M	\$6.5M
Jobs: Proposed	3,080	1,782
Jobs: Actual to Date	4,211	1,083
Other Public Benefit	4	-

*\*This includes one agreement that is not in compliance. RIA has received partial repayment of the grant funds disbursed, and the grant will be closed once full repayment is received.*



**FY 2025**

# State Grant Programs

RIA uses state funding to award competitive grants to local governments and public utilities for water, wastewater and stormwater projects. RIA’s Board of Directors selects projects based on relative need, feasibility and impact. Most grantees must contribute financially to the project.

**BASIC INFRASTRUCTURE**

Assists communities in addressing public health and environmental hazards or improving existing critical infrastructure.

**ECONOMIC INFRASTRUCTURE**

Helps build local infrastructure capacity to support planned job creation or prepare for economic development opportunities.

**INFRASTRUCTURE PLANNING**

Provides resources to plan for long-term viability, which is often a challenge in small and rural communities.

**62**

Grants Awarded

**\$61 MILLION**

Awarded

**56%**

of funds to small and rural communities

**Customer Service**

RIA partners with communities to connect them with the resources they need. Each year, RIA hosts a webinar to share grant opportunities, and program details are published online. Grantees also have easy access to instructional videos and checklists to help them meet program requirements.



**139** Webinar Participants



**225** Customers Assisted



**1,300** Video Views

**Grant Priorities**

*By Dollars Awarded*



- 31% Health & Environmental Issues
- 31% Capacity & Economic Development
- 28% Aging Infrastructure
- 6% Planning
- 4% Regional Partnerships





## Tory Road Elevated Water Tank

*Town of Pageland*

CHESTERFIELD COUNTY  
RURAL WATER COMPANY

**Need:** Due to rapid growth, the existing water tank was too small to provide a reliable supply.

**Solution:** Construction of a second, larger elevated water tank.

**Impact:** Provides a reliable drinking water supply for 3,500 households and 200 businesses, with capacity to support future growth.

**\$1 Million**

RIA GRANT FUNDING

**\$2.2 Million**

TOTAL BUDGET



*"This project strengthens the foundation for sustainable growth, benefiting the entire community. The support from RIA has allowed us to address critical needs that would otherwise be beyond our financial reach."*

— SHANE SLIGH  
ADMINISTRATOR, TOWN OF PAGELAND



# Grant Recipients

An RIA grant manager works closely with each grantee from award to close out, helping to keep projects on schedule, within budget and in compliance with program requirements. RIA disburses funds only for work that has been completed.

Grantee	Project	Award
<b>BASIC INFRASTRUCTURE</b>		
Abbeville, City of	DW	\$1,500,000
Anderson County	WW	\$1,500,000
Anderson, City of	WW	\$1,500,000
Bamberg County	SW	\$856,000
Beaufort-Jasper Water and Sewer Authority	WW	\$1,500,000
Bishopville, City of	DW	\$1,500,000
Camden, City of	SW	\$861,898
Chapin, Town of	WW	\$1,074,414
Columbia, City of	WW	\$1,500,000
Conway, City of	SW	\$1,500,000
Coward, Town of	DW	\$1,074,930
Dorchester County	SW	\$1,252,245
Folly Beach, City of	DW	\$1,500,000
Gaffney Board of Public Works	WW	\$1,500,000
Grand Strand Water and Sewer Authority	DW	\$1,500,000
Greenwood Metropolitan District	WW	\$1,500,000
Hilton Head Public Service District	WW	\$1,500,000
Joint Municipal Water and Sewer Commission/Town of Swansea	DW & WW	\$2,000,000
Laurens Commission of Public Works	WW	\$747,555
Laurens County Water & Sewer Commission	DW	\$1,500,000
Marion, City of	SW	\$253,000
Metropolitan Sewer Subdistrict	WW	\$1,500,000
Mullins, City of	SW	\$1,500,000
Myrtle Beach, City of	WW	\$1,500,000
Newberry, City of	WW	\$1,500,000
Ninety Six Commission of Public Works	DW	\$1,279,465
North Charleston Sewer District	WW	\$1,500,000
Perry, Town of	DW	\$542,665
Pickens Regional Joint Water System	DW	\$1,500,000
Richland County	WW	\$1,500,000
Ridgeway, Town of	WW	\$1,500,000
Rock Hill, City of	DW	\$1,223,366
Spartanburg, City of	SW	\$1,430,520
Sumter County/High Hills Rural Water Co.	DW	\$500,000
Sumter, City of	DW	\$815,940
Sumter, City of	WW	\$1,500,000
Union, City of	SW	\$687,885
Walterboro, City of	DW	\$1,340,143

Grantee	Project	Award
<b>ECONOMIC INFRASTRUCTURE</b>		
Dorchester County	WW	\$1,500,000
Hardeeville, City of	WW	\$1,000,000
Lowcountry Regional Water System	WW	\$1,493,900
Manning, City of	DW	\$202,150
Marlboro County	DW & WW	\$1,500,000
Metropolitan Sewer Subdistrict	WW	\$825,000
Newberry County	DW & WW	\$678,750
Southside Rural Community Water District	DW	\$1,253,472
<b>INFRASTRUCTURE PLANNING</b>		
Aiken County	WW	\$250,000
Barnwell, City of	WW	\$242,000
Blacksburg, Town of	DW	\$250,000
Blackville, Town of	WW	\$250,000
Chester, City of	SW	\$250,000
Greeleyville, Town of	WW	\$250,000
Heath Springs, Town of	DW & WW	\$187,500
Kershaw County and Lee County Regional Water Authority/Town of Lynchburg	DW & WW	\$250,000
Lane, Town of	DW	\$250,000
Mitford Rural Water District	DW	\$235,000
Patrick, Town of	SW	\$250,000
Pendleton, Town of	DW & WW	\$168,562
Scotia, Town of	DW	\$125,000
Springfield, Town of	DW	\$250,000
Williston, Town of	DW & WW	\$250,000
Winnsboro, Town of	WW	\$182,500
<b>62 projects</b>		<b>\$61,033,860</b>

## PROJECT KEY

**DW:** Drinking Water  
**WW:** Wastewater  
**SW:** Stormwater

FY 2025

# Loan Programs

The State Revolving Funds (SRF) loan programs provide low-cost loans to public utilities for water, wastewater and stormwater projects. Funding for the program comes from loan repayments and allocations of federal and state funds. Borrowers must have sufficient revenue to repay the loan as well as operate and maintain the system.



**\$109 MILLION**

Loans Closed

**2.3%**

Standard Interest Rate

**\$108 MILLION**

Disbursed

## FY25 LOANS

Recipient	Project	Amount
Anderson Regional Joint Water System	DW	\$823,000
Berkeley County	DW	\$11,000,000
Camden, City of	WW	\$5,525,000
Chapin, Town of	WW	\$4,646,241
Hilton Head Public Service District	DW	\$2,589,929
James Island Public Service District	WW	\$1,096,783
Orangeburg, City of	DW	\$13,112,100
Renewable Water Resources	WW	\$15,445,636
Renewable Water Resources	WW	\$4,750,000
Renewable Water Resources	WW	\$10,795,000
Rock Hill, City of	WW	\$28,434,516
Summerville, Town of	DW	\$10,735,417
<b>12 projects</b>		<b>\$108,953,622</b>

## PROJECT KEY

**DW:** Drinking Water

**WW:** Wastewater

## PARTNERING FOR SUCCESS

RIA jointly administers the SRF programs with the South Carolina Department of Environmental Services (DES). RIA manages all financial aspects, including setting loan policies, conducting credit reviews, issuing loan agreements and handling payments. DES prioritizes and manages projects and ensures compliance with federal requirements.

## AFFORDABILITY

Part of the annual federal funding is set aside for all principal forgiveness (APF) loans, which do not have to be repaid if the recipient complies with program requirements. These funds primarily benefit smaller communities with affordability concerns. In FY25, the SRF programs committed \$25 million to 25 APF projects.

# Hemphill Water Treatment Plant Renovation

*Chester Metropolitan District*

**Need:** Key components of the water treatment facility nearing the end of their useful life.

**Solution:** Rehabilitation and upgrades of critical components.

**Impact:** A more reliable treatment facility that can be expanded to serve a growing residential and industrial customer base.

**\$9 Million**

SRF LOAN

**\$10 Million**

SCIIP GRANT

**\$22 Million**

TOTAL BUDGET

NEW RAW WATER  
PUMPING MANIFOLD



*"Renovating the structural, electrical and mechanical components of our 60-year-old water treatment plant is important to extending the life of the plant and providing a high level of resiliency and efficiency for the future. Funding from the grant and loan made it possible to leverage our funds to make the project a reality."*

— FRED CASTLES  
EXECUTIVE DIRECTOR,  
CHESTER METROPOLITAN DISTRICT

OLD RAW WATER  
PUMPING MANIFOLD





# SOUTH CAROLINA INFRASTRUCTURE *Investment Program*



The South Carolina General Assembly directed \$1.4 billion of the state's American Rescue Plan Act funding to transformational investments in water, wastewater and stormwater infrastructure. RIA used these funds to create the South Carolina Infrastructure Investment Program (SCIIP). Awarded in FY23, these grants are supporting over 200 projects, making an impact in every county across the state. These capital improvement projects will strengthen fundamental services for residents and businesses, create more resilient communities and build capacity for long-term growth and development.

## 219

Projects Awarded

## 407

Contracts Completed  
or Underway

## \$359 MILLION

Project Funds Disbursed

## Lower Crane Creek Equalization Storage

*City of Columbia*

**Need:** High wastewater volume causes frequent sanitary sewer overflows in northern Richland County.

**Solution:** Construction of a large storage tank and pump station to divert excess flow.

**Impact:** Expanded capacity to support rapid residential and industrial growth while protecting water quality.

### \$10 Million

SCIIP GRANT

### \$62 Million

TOTAL BUDGET



*"This project will provide significant public health benefits while also allowing for additional growth and development. The RIA grant was critical in allowing the City to fund the total project cost within its wastewater budget, providing a significant financial benefit to Columbia's water and sewer customers."*

— JOHN T. RIGGS, PE  
DEPUTY DIRECTOR OF MAJOR CAPITAL PROJECTS,  
CITY OF COLUMBIA



## ACCOUNTABILITY & STEWARDSHIP

RIA staff maintain regular communication with SCIIP grantees and conduct detailed reviews at key points in the project life cycle. Timely progress and documented compliance with federal requirements are critical to ensuring that all funds are appropriately spent by the December 2026 federal deadline for expenditures.



## Drainage Improvements in Unincorporated Areas

*Horry County*

**Need:** Frequent flooding of roads and property due to undersized stormwater infrastructure.

**Solution:** Construction of larger culverts and other drainage structures in high priority locations.

**Impact:** Reduced flooding and greater storm resilience in a coastal community.

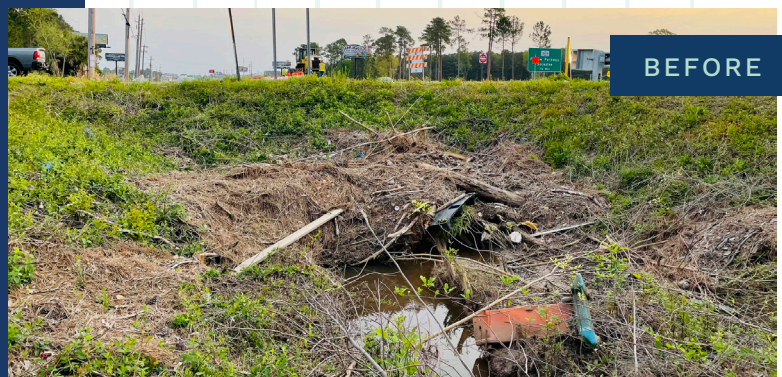
**\$6.5 Million**    **\$7.6 Million**

SCIIP GRANT

TOTAL BUDGET

*"RIA funding allowed us to expedite this project and complete all upgrades just in time for the upcoming hurricane season."*

— BRANDON WAGNER  
STORMWATER MANAGER, HORRY COUNTY





## SMALL SYSTEM

# Viability Initiatives

Some South Carolina utilities face challenges that cannot be solved with capital improvement grants alone. In 2022, RIA completed a statewide study of these issues. With the data from that assessment and input from hundreds of stakeholders, RIA developed a four-pronged strategy. With dedicated staff to manage these initiatives, we are working with our partners to develop a comprehensive solution for those that need it most.

### 1 UTILITY VIABILITY IDENTIFICATION

RIA developed an Excel-based tool that helps identify potential viability concerns. This year, RIA made major improvements to the tool and began to provide training and implement plans to increase usage.

### 2 COORDINATION OF ASSISTANCE

RIA hosts quarterly meetings of the Viability Assistance Network, a group of technical assistance providers and other organizations. Members collaborate to identify key issues and develop ways to help struggling utilities.

### 3 LEVERAGING PARTNERSHIPS

RIA is developing a training manual for members of utility boards and councils. This manual and training tools will provide beginner to advanced board members with the critical information required to oversee utility financial and operational management in accordance with standard best practices.

### 4 TARGETED FINANCIAL ASSISTANCE

RIA funds viable solutions through grants for planning projects and capital improvements that support regional partnerships, which are often key to strengthening very small utilities.



45 Planning Grants

\$193 MILLION

Grant Funds for Regional Solutions

# Partnerships

RIA collaborates with other agencies and organizations to leverage resources and provide the best possible services to South Carolina communities. Thank you to all of our partners for your support!

## FUNDING

RIA hosts bimonthly meetings of a committee of public infrastructure funding agencies, working together to develop collaborative solutions to complex needs.



## PERMITTING

RIA coordinates with other agencies to ensure that permit applications for funded projects are reviewed in time to meet program deadlines.



## TECHNICAL ASSISTANCE

RIA collaborates with various partners to provide targeted support to communities through the Viability Assistance Network, as well as assistance to individual utilities as needed.





2024-2025 ANNUAL REPORT



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AGENCY: South Carolina Department of Commerce

SUBJECT: Status Report Pursuant to Act 3 of 2023

Act 3 of 2023 provided for among other things appropriations to the Department of Commerce in the amounts of \$1,091,082,986 to defray the cost of certain infrastructure and other improvements, and \$200,000,000 as a loan to the project sponsor for additional soil stabilization, each in support of Project Connect, now publicly known as Scout Motors, Inc.

The Act further provides that the Department of Commerce must furnish a quarterly project status report to the Joint Bond Review Committee until all of the funds have been expended, and the Secretary of Commerce has certified that all project obligations have been met.

Responsive to these provisions, the South Carolina Department of Commerce has provided to the Committee its project status report for the period ending September 30, 2025, which reflects expenditures for the period of \$43,653,276, and total expenditures to date of \$600,165,416.

The report also provides a general status update for the project covering activities and developments during the reporting period.

COMMITTEE ACTION:

Receive this report as information.

ATTACHMENTS:

1. Project Connect Quarterly Status Report for the period ended September 30, 2025.

**Funds Expended through September 30, 2025:**

Designated Recipient and Purpose	Amount Designated	Prior Periods	Current Period	Remaining Balance
Richland County				
Grant	831,082,986			295,094,242
Land Acquisition		28,923,295		
Site Improvements		250,597,813	25,968,782	
Mitigation		50,477,394		
Soil Stabilization		90,000,000		
Reimbursements- Scout		90,021,460		
Loan	200,000,000	2,809,537	3,649,264	193,541,199
Soil Stabilization				
SC Technical College	25,000,000	8,500,000	8,000,000	8,500,000
Training Center				
SC Department of Transportation	200,000,000	8,426,596		191,573,404
Other Recipients				
City of Columbia	35,000,000	26,756,045	6,035,230	2,208,725
<b>Totals to Date</b>	<b>1,291,082,986</b>	<b>556,512,140</b>	<b>43,653,276</b>	<b>690,917,570</b>

**General Updates and Developments:**

- Body shop, Paint Shop and Assembly Building are in the next phase of construction.
- Mass grading is scheduled to be completed at the end of 2025.
- The one-site Training Center will be complete at the end of 2025 as well.
- Rail Bridge completion date is November of 2025.
- Construction on the Interchange has begun.
- ReadySC is conducting pre-hire training for Maintenance Technicians and working on a hiring strategy for production positions.

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AGENCY: Department of Behavioral Health and Developmental Disabilities

SUBJECT: Regional Centers Condition Assessments and Renovation Plan

Proviso 36.14 of the Fiscal Year 2024-25 Appropriations Act directs the South Carolina Department of Disabilities and Special Needs, now Department of Behavioral Health and Developmental Disabilities – Office of Intellectual and Developmental Disabilities, to engage the services of one or more professional firms qualified to conduct facility condition assessments at each of the Department’s Regional Centers and provide a comprehensive plan with recommendations for their renovation, construction, reconstruction, or demolition. The comprehensive plan must be submitted to the Joint Bond Review Committee for review and comment prior to implementation, and the Department must provide periodic reports to the Committee at such times and in such form and substance as may be prescribed by the Committee.

At its meeting on October 8, 2024, the Committee reviewed the Plan submitted by the Department and established an expectation of calendar quarterly reporting on the progress of the Plan.

Responsive to this expectation, the Committee has received a timely status report for the period ending September 30, 2025, which reflects expenditures for the period of \$291,308. Commitments to date total \$29,595,393 and current total outstanding commitments are \$28,950,316.

During the quarter, asbestos abatement in Coastal Center buildings Highlands 110 and Hillside 620 were completed, and renovation work began on September 29, 2025. The third-party inspector for the Coastal Center Priority 1 and Priority 2 projects has been selected. Asbestos testing on Highlands 710 and 810 have also been completed.

Design development and construction documents for eight (8) additional Coastal Center buildings are progressing as are schematic design drawings for seven (7) Pee Dee Center Priority 1 buildings and for the two Saleeby Center Priority 1 buildings.

The Department solicited for a Construction Manager as Agent to review designs in accordance with Department of Public Health standards for Intermediate Care Facilities to ensure fit for purpose and to assist with on-site project management. A Construction Manager has been selected and will begin working with architects to evaluate the Coastal Center design and construction drawings and will move to the other Centers thereafter.

The Department also worked with the Department of Administration to evaluate the continued funding availability to complete the Regional Center projects. The Department currently has sufficient funding to complete the Priority 1 and 2 buildings at Coastal Center, the Priority 1 buildings at Pee Dee, Saleeby and Whitten Center, and four of the Priority 1 buildings at Midlands Center, not accounting for cost escalations, unknown conditions, and the addition of suitability and fit for purpose measures identified.

COMMITTEE ACTION:

Receive this report as information.

ATTACHMENTS:

1. Letter dated November 12, 2025, of Constance Holloway, Office Director, Office of Intellectual and Developmental Disabilities, South Carolina Department of Behavioral Health and Developmental Disabilities.
2. Quarterly Status Report for the period ended September 30, 2025.

November 12, 2025

Ms. Catherine Hart  
Director of Research  
Joint Bond Review Committee  
312 Gressette Building  
Columbia, South Carolina 29201

Dear Ms. Hart:

Pursuant to Proviso 36.14 of the annual appropriation act, the SC Department of Behavioral Health and Developmental Disabilities - Office of Intellectual and Developmental Disabilities ("BHDD - OIDD") hereby submits its progress report on the Comprehensive Regional Center Renovation Plan ("Renovation Plan") for the quarter ended September 30, 2025.

Thank you for the opportunity to provide this status update on the Renovation Plan. BHDD - OIDD welcomes any feedback or suggestions on its implementation. Please let me know if we can offer any further information.

Sincerely,

  
Constance Holloway, Office Director

Enclosure

**Comprehensive Regional Center Renovation Plan Implementation Progress Report (Update #4)  
For the Quarter Ended September 30, 2025.**

In our previous progress report, the SC Department of Behavioral Health and Developmental Disabilities - Office of Intellectual and Developmental Disabilities (“BHDD - OIDD”) reported the agency entered into architect-engineering (A/E) service contracts with Caplea Coe Architects for the Coastal Center Priority 2<sup>1</sup> buildings, and A/E service contracts with Moseley Architects for the remaining Pee Dee Center Priority 1<sup>1</sup> buildings, Pee Dee Center Priority 2 buildings, and Saleeby Center Priority 1 buildings. BHDD-OIDD also entered into Contractor services agreements<sup>2</sup> with Trident Construction for the Coastal Center Priority 1 and Priority 2 buildings, and Trident began preconstruction phase services for Coastal Center - Highlands 110 and Hillside 620 including shop drawings review.

During the quarter ended September 30, 2025, construction began at Coastal Center. EAS Environmental completed the asbestos abatement in Coastal Center buildings Highlands 110 and Hillside 620, and Trident Construction began the renovation work of these two buildings, with demolition starting on September 29, 2025.

Bowman Company was also secured as the third-party inspector for the Coastal Center Priority 1 and Priority 2 projects. Additionally, S&ME completed asbestos testing on Highlands 710 and 810. Neither building showed asbestos containing materials.

Caplea Coe Architects has progressed with design development and construction documents for eight (8) additional Coastal Center buildings as shown in the chart below. Attached hereto as Exhibit A is a graphic showing the proposed construction schedule for all of the Coastal Center Priority 1 buildings.

Coastal Center Construction Drawings Completion		
Building	Priority	Percent Complete
Hillside 220	1	75%
Hillside 520	1	60%
Highlands 310	1	60%
Highlands 210	2	60%
Centerview Gymnasium H1	2	60%
Canteen H2	2	60%
Classroom Building H3	2	60%
Classroom Building H4	2	60%

Moseley Architects has continued development of schematic design drawings for seven (7) Pee Dee Center Priority 1 buildings (Mulberry 301 and 302, Pecan 201, 202, 203, 204 and 205) and for the two Saleeby Center Priority 1 buildings (Saleeby Center and Saleeby Center Wing).

<sup>1</sup> Priority 1 and Priority 2 buildings include residential and program areas

<sup>2</sup> AIA Document A133, **Standard Form of Agreement Between Owner and Construction Manager as Constructor** where the basis of payment is the Cost of the Work Plus a Fee with a Guaranteed Maximum Price

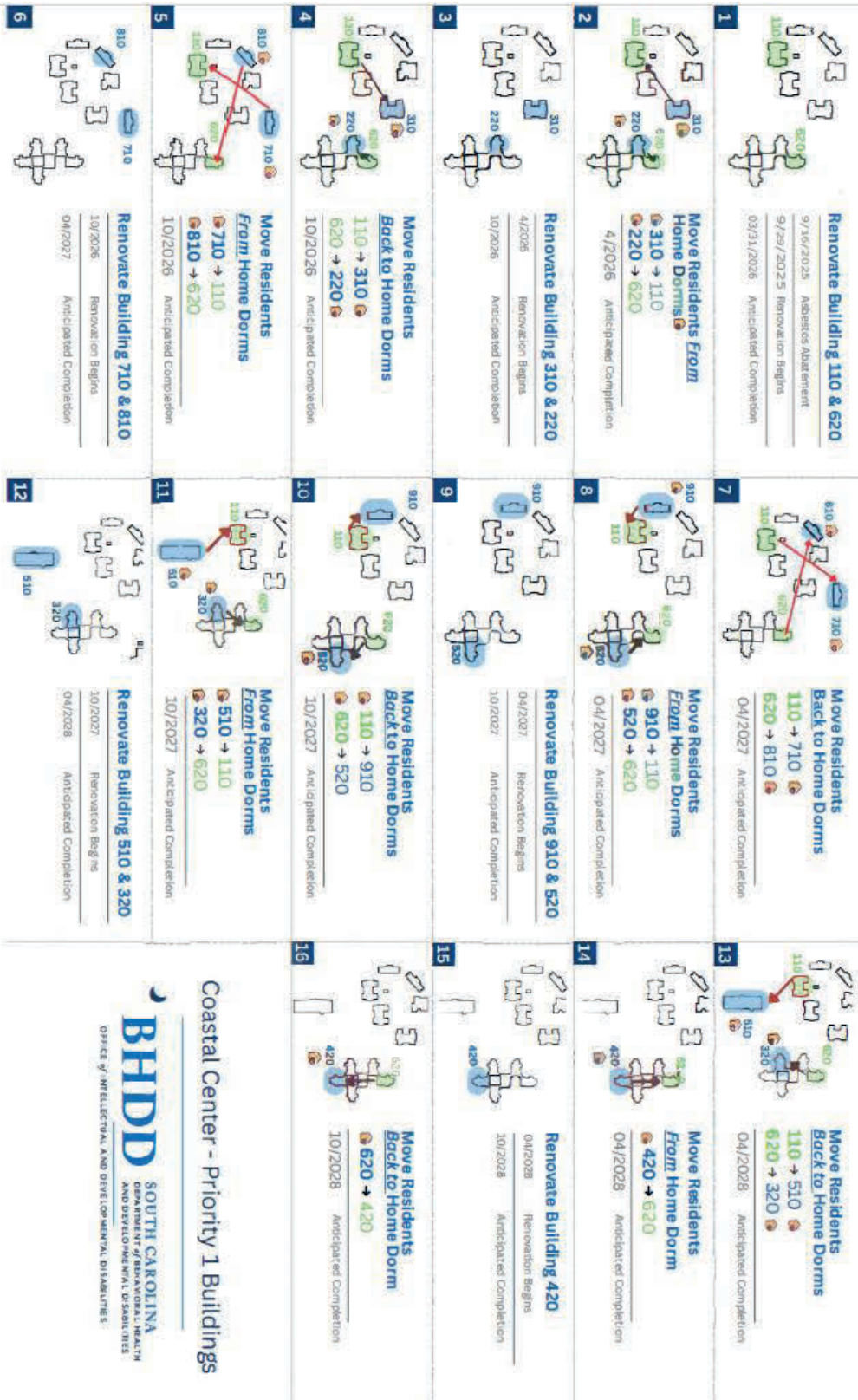
The following chart shows a summary of commitments and expenditures.

Summary of Commitments and Expenditures			
	Commitments	Expenditures	Outstanding Commitments
Prior Periods	\$5,275,262	\$353,769	\$4,921,493
Quarter Ended September 30, 2025	\$24,320,131	\$291,308	\$24,028,823
<b>Total</b>	<b>\$29,595,393</b>	<b>\$645,077</b>	<b>\$28,950,316</b>

To ensure the renovations being made consider the suitability of the facilities to serve patients as well as the deferred maintenance obligations, during this quarter, BHDD-OIDD solicited for a Construction Manager as Agent to review designs in accordance with Department of Public Health standards for Intermediate Care Facilities to ensure fit for purpose and to assist with on-site project management. The request for qualifications was advertised in the South Carolina Business Opportunities Journal beginning July 30, 2025, with submittals due on August 22, 2025. Two proposals were received. Interviews were conducted on September 17, 2025, and a Notice of Intent to Award to Leitner Management Group (LMG) was posted on September 30, 2025. During the next quarter, LMG will begin working with Caplea Coe to evaluate the Coastal Center design and construction drawings and will move to the other Centers thereafter.

During this quarter, BHDD-OIDD also worked with the Department of Administration to evaluate the continued funding availability to complete the Regional Center projects. This analysis revealed that \$72.6M of the original \$73M in Families First Coronavirus Response Act Funds (FFCRA) remained available for use; however, the \$22M in earmarked funds from Social Security Income payments originally identified to fund these projects had been redirected for other uses. An additional \$7.8M was identified as available from other funding streams, with \$3M of that to be held back annually for emergency needs. As such, BHDD-OIDD currently has sufficient funding to complete the Priority 1 and 2 buildings at Coastal Center, the Priority 1 buildings at Pee Dee, Saleeby and Whitten Center, and four of the Priority 1 buildings at Midlands Center, not accounting for cost escalations, unknown conditions, and the addition of suitability and fit for purpose measures identified.

## Exhibit A





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AGENCY: Joint Bond Review Committee

SUBJECT: Future Meeting

The State Fiscal Accountability Authority is scheduled to meet on Tuesday, February 3, 2026.

COMMITTEE ACTION:

Schedule next meeting.

ATTACHMENTS:

1. Tentative Schedule of Calendar Year 2026 Meetings.

Joint Bond Review Committee  
Tentative Schedule of Calendar Year 2026 Meetings

Wednesday, January 28, 2026 – 10:00 a.m.

Wednesday, March 25, 2026 – 10:00 a.m.

Tuesday, June 9, 2026 – 1:00 p.m.

Tuesday, August 11, 2026 – 1:00 p.m.

Tuesday, October 6, 2026 – 1:00 p.m.

Tuesday, December 1, 2026 – 1:00 p.m.

2026

January	April	July	October
Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa
1 2 3	1 2 3 4	1 2 3 4	1 2 3
4 5 6 7 8 9 10	5 6 7 8 9 10 11	5 6 7 8 9 10 11	4 5 6 7 8 9 10
11 12 13 14 15 16 17	12 13 14 15 16 17 18	12 13 14 15 16 17 18	11 12 13 14 15 16 17
18 19 20 21 22 23 24	19 20 21 22 23 24 25	19 20 21 22 23 24 25	18 19 20 21 22 23 24
25 26 27 28 29 30 31	26 27 28 29 30	26 27 28 29 30 31	25 26 27 28 29 30 31
February	May	August	November
Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7	1 2	1	1 2 3 4 5 6 7
8 9 10 11 12 13 14	3 4 5 6 7 8 9	2 3 4 5 6 7 8	8 9 10 11 12 13 14
15 16 17 18 19 20 21	10 11 12 13 14 15 16	9 10 11 12 13 14 15	15 16 17 18 19 20 21
22 23 24 25 26 27 28	17 18 19 20 21 22 23	16 17 18 19 20 21 22	22 23 24 25 26 27 28
	24 25 26 27 28 29 30	23 24 25 26 27 28 29	29 30
	31	30 31	
March	June	September	December
Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa	Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7	1 2 3 4 5 6	1 2 3 4 5	1 2 3 4 5
8 9 10 11 12 13 14	7 8 9 10 11 12 13	6 7 8 9 10 11 12	6 7 8 9 10 11 12
15 16 17 18 19 20 21	14 15 16 17 18 19 20	13 14 15 16 17 18 19	13 14 15 16 17 18 19
22 23 24 25 26 27 28	21 22 23 24 25 26 27	20 21 22 23 24 25 26	20 21 22 23 24 25 26
29 30 31	28 29 30	27 28 29 30	27 28 29 30 31