



2022 Competitive Housing Development Request for Grant Applications (RFGA)

Supportive Housing for Individuals with Serious and Persistent Mental Illness

Application Notice

ADDENDUM 1

Request for Grant Application Notice is updated with this Addendum 1: deleted language is ~~struck through~~; new language is **bold, underlined, and highlighted**.

2022 COMPETITIVE HOUSING DEVELOPMENT REQUEST FOR GRANT APPLICATIONS (RFGA)

SUPPORTIVE HOUSING FOR INDIVIDUALS WITH SERIOUS AND PERSISTENT MENTAL ILLNESS

Posted Date: April 29, 2022

Deadline: ~~July 29, 2022 at 5:00 pm,~~ **December 30, 2022 (ongoing review beginning August 1, 2022)**

APPLICATION NOTICE

The Oregon Health Authority (OHA) Health Systems Division (HSD) is pleased to announce the Request for Grant Applications (RFGA) for ~~forgivable loan~~ **funding** assistance in the development of Supportive Housing **and grant assistance for certain Start-up costs for such housing** for individuals with a Serious and Persistent Mental Illness (SPMI).

The not-to-exceed amount that OHA HSD may award collectively under this RFGA and the RFGA for Licensed Residential Treatment Homes or Facilities, both posted on April 29, 2022, is ~~\$101~~ **\$92.9 million.**

This Notice contains information about state funding requirements and updates to the OHA HSD policies applicable to this RFGA. It is imperative that this Application Notice and the Application Form be read carefully and in their entirety before an Application is submitted.

The OHA is a state government agency with a single overarching strategic goal: eliminate health inequities in Oregon by 2030.

The OHA's Health Equity Definition is as follows:

Oregon will have established a health system that creates health equity when all people can reach their full health potential and well-being and are not disadvantaged by their race, ethnicity, language, disability, age, gender, gender identity, sexual orientation, social class, intersections among these communities or identities, or other socially determined circumstances.

Achieving health equity requires the ongoing collaboration of all regions and sectors of the state, including tribal governments to:

- 1. Address the equitable distribution or redistribution of resources and power; and*
- 2. Recognize, reconcile and rectify historical and contemporary injustices.*

Please be sure your Application is aligned with OHA's strategic goal and health equity definition when completing this Application.

1. APPLICATION MATERIALS

Application materials can be found at the OHA HSD Social Determinants of Health (SDOH) website:

<https://www.oregon.gov/oha/HSD/AMH/Pages/SDOH.aspx>

Materials on the website will include the Application documents, announcements, technical advisories and Questions & Answers (Q&As). Applicant is expected to complete the Application, including the Budget Forms, using required OHA HSD forms.

2. APPLICATION DUE DATE

Application materials must be submitted by email to OHA HSD no later than **11:59 pm on July 29, 2022. on December 30, 2022. However, OHA may begin reviewing applications submitted and making awards on or after August 1, 2022.**

The completed Application Form, Budget Forms and any other required materials must be submitted as a single document in PDF format by email to:

Richard Malloy, HSD Housing Investment Coordinator

RICHARD.F.MALLOY@dhsoha.state.or.us

Applications that are not complete will be returned to the Applicant. Applications may be resubmitted before the due date in the present round or in any subsequent round of funding for Supportive Housing.

3. OHA HSD CONTACT FOR APPLICATION PROCESS

Richard Malloy, HSD Housing Investment Coordinator

RICHARD.F.MALLOY@dhsoha.state.or.us

4. APPLICATION WEBINAR

HSD will provide one webinar for this RFGP. HSD staff will present information on the RFGA requirements and answer questions. All interested parties are invited to attend the webinar.

Information about the webinar including dates/times and how to access the webinar will be found on the OHA HSD Social Determinants of Health (SDOH) website:

<https://www.oregon.gov/oha/HSD/AMH/Pages/Housing-Funds.aspx>

This will include information on accommodations available for individuals with disabilities or individuals who speak a language other than English and how to request that accommodation.

Copies of the webinar materials will be posted on the website following the webinar.

5. BACKGROUND INFORMATION

The Oregon Legislative Assembly has directed funds to the Oregon Health Authority through the Health Systems Division for the expansion of community-based housing for individuals with a Serious and Persistent Mental Illness (SPMI) who are able to live independently with appropriate support services readily available.

Through this RFGA process, Applicants can apply for Housing Development funds in the form of forgivable loan assistance for real property new construction or acquisition/rehabilitation projects **and start-up costs**.

6. PROJECT ELIGIBILITY & APPLICANT ELIGIBILITY

- This RFGA is open for projects that will serve individuals with a Serious and Persistent Mental Illness (SPMI), as defined in Attachment A, who can live independently in community-based housing with appropriate supportive services available. This is the “**target population**” for this RFGA, and funded projects must add new units to the inventory of housing for such residents.
- Proposed projects serving individuals with an SPMI must be Supportive Housing and adhere to the definition of “Supportive Housing”, as defined in Section 10 below.
- OHA HSD reserves the right to further target funding for specific types of housing development based on community needs.
- Housing projects may be either real property new construction or acquisition/rehabilitation, and can be located anywhere within the state.
- **Start - Up costs that are eligible for a project are detailed below in Section 8.**
- Applicants must be registered and in good standing with the Secretary of State to do business in the State of Oregon. Eligible Applicants include but are not limited to program providers and affordable housing organizations as well as sovereign Tribes, non-profit and for-profit organizations, government entities, formal partnerships and limited liability companies (LLC). If you have a question about an organization or entity’s eligibility, please submit your question to the contact found on the OHA HSD Social Determinants of Health (SDOH) website.
- Eligible Applicants may partner with other organizations/entities in order to assure capacity to develop, operate and provide support services for a new project. An example would be an affordable housing development partnering with a service provider. However, one of the project “partners” must be the sole Applicant.
- Applicants must confirm authorization to apply for funds by providing a copy of a Resolution from the applicable organization(s). (Refer to information on page 44 **17** of this Notice.)

7. TRIBAL APPLICATIONS

The Nine Federally Recognized Tribes of Oregon are eligible Applicants for funding of Supportive Housing for Individuals with SPMI. The following are Application requirements specific to Tribes:

- Letter of Endorsement from Tribal Health Program or Tribal Behavioral Health Program. (Refer to information in Section 44 **12** of this Notice.)
- Organization Documents. Provide a Resolution authorizing the Application and receipt of an award if selected. Refer to information on page 46 **17** of this Notice.

8. FUNDING LIMITATIONS/ USES

Listed below are the project maximums and per unit maximums for target population housing:

Minimum per project	Maximum Per Project	Unit Maximums Per SPMI Unit
\$10,000	\$ 2,700,000	\$ 300,000

- Funding awards may be used for real property new construction or acquisition/rehabilitation and associated costs. Associated costs may include fixtures, furnishings and equipment. Funded projects must add new units to the inventory of Supportive Housing serving individuals with a SPMI.
- ~~Funding awards cannot be used for start-up costs, operating costs or support service costs of a project this funding cycle.~~
- **Funding awards may be made for start-up costs. Eligible start-up costs include upfront personnel costs for recruitment, salaries, or training for the first two months of operations; facility costs (lease or mortgage payments, utility hookup fees, insurance premiums, etc.); office supplies and**

furnishings; equipment, including vehicle(s), specialized equipment and appliances. Start-up costs are subject to the Maximum Per Project Limitation in the above table but not the Unit Maximums per SPMI Unit.

- Funding awards cannot be used for any costs incurred prior to the date of an OHA HSD Conditional Award Letter, unless expressly authorized in the letter.
- **Funding awards cannot be used to cover any costs that have been paid or will be paid for by other financing, including other grants or contracts, whether from OHA or from another State of Oregon agency or any third party (including Medicaid).**
- OHA HSD reserves the right to approve funding awards for less than the amount requested. Approval of an Application will be conditional and subject to further review. Awards may also be subject to review and approval by the Oregon Department of Justice for legal sufficiency as required by Oregon Revised Statute ORS 291.047.

9. AFFORDABILITY REQUIREMENT

Project rents for any unit to be occupied by an individual of the target population must be affordable for that target population. Affordable is defined as monthly housing costs (e.g., rent, utilities) that do not exceed 30% of an individual's monthly income. Project-based or tenant-based rent subsidies may be utilized to make rents affordable for individuals of the target population.

Applicants may apply to OHA for rental assistance provided they have attempted to secure other financial assistance as a primary source. Please go to the following website for additional information on obtaining OHA rental assistance (not awarded through this RFGA).

<https://www.oregon.gov/oha/HSD/AMH/Pages/SDOH.aspx>

10. HOUSING TYPE REQUIREMENT: SUPPORTIVE HOUSING

Supportive Housing, for the purposes of this RFGA, means rental housing for individuals with SPMI with the following key characteristics and requirements for such residents:

1. It is permanent housing. Residents may maintain tenancy as long as they meet occupancy obligations, including payment of monthly rent.
2. It is affordable housing. Residents shall pay no more than 30% of their monthly income for housing expenses, including rent and utilities. (See Section 9 above.)
3. It is community-based housing. Opportunities to interact with neighbors and community members, who do not have a disability, to the fullest extent possible are readily available.
4. It offers access to support services.
 - a. Participation in support services is voluntary; services cannot be mandated as a condition of tenancy and a resident cannot be evicted solely for rejecting services.
 - b. Residents have a choice and range of flexible as well as culturally appropriate and responsive services that are available as needed and desired; services are adaptable to meet the changing needs of residents.
 - c. Services are designed to promote recovery and enable residents to attain and maintain their housing.
 - d. The provision of housing and the provision of services are distinct activities.
 - e. Access to the services of peer mentor is a program requirement.
5. It is private and secure with a target population resident having the same rights and responsibilities that are enjoyed by any other member of the community.
6. It is comparable to other rental housing in the market without restrictions or provisions specific to individuals with SPMI. This applies to lease provisions, lease terms with option to renew (as long as in compliance), occupancy rules and range of choices for unit type.

11. SUPPORTIVE SERVICES REQUIREMENT

Applicants must provide certain direct services to the target population or secure services through a partnership with one or more local service providers with the experience to provide services for the target population. ~~See page 3 for a description.~~ Such services must include the participation of peer mentors.

12. REQUIRED LETTER(S) OF ENDORSEMENT

Applicant must provide the appropriate Letter(s) of Endorsement as described below with their Application.

◆ Letters required if Applicant is not one of the Nine Federally Recognized Tribes of Oregon:

Coordinated Care Organization (CCO)

Applications for Supportive Housing must be accompanied by a Letter of Endorsement from the CCO for the service area the project will be located in. If the proposed project location is in the service area of two CCOs, Applicant must provide a letter from each.

The letter **must** clearly demonstrate the CCO's commitment to service coordination with Applicant for the target population as well as describe the envisioned partnership to benefit the proposed housing and its target population residents.

Community Mental Health Program (CMHP)

Applications must also include a Letter of Endorsement from the appropriate CMHP. A letter from a CMHP must include the following:

1. The CMHP staff's agreement to work together with Applicant to develop and deliver appropriate support services to target population residents. Participation in services by individuals with SPMI must be voluntary and not a condition of tenancy.
2. Explanation of how the CMHP will provide service program oversight on an on-going basis and dedicated staff who will provide service program oversight and support.
3. Explanation of how the CMHP will ensure that support is available to target population residents to resolve tenancy issues.

◆ Letters required if Applicant is one of the Nine Federally Recognized Tribes of Oregon:

Tribal Health Program or Tribal Behavioral Health Program

The letter must clearly demonstrate the Program's commitment to service coordination with Applicant for the target population as well as describe the envisioned partnership to benefit the proposed housing and its target population residents. The letter must include information on coordination with other service resources including, if

appropriate, a Coordinated Care Organization (CCO) and/or Community Mental Health Program (CMHP).

13. APPLICATION SELECTION PROCESS AND AWARD FUNDING PROCESS

A. Application Review

Applications will be reviewed, scored and ranked by two OHA HSD-appointed review panels: the Occupancy and Services Review Panel and the Technical Review Panel. The scores from both panels will be combined to arrive at the overall score for each Application. The review panels will use criteria listed on page 49²¹ to score and rank the Applications.

The review panels' recommendations will be presented to the Director of the Health Systems Division who will make the final award decisions. **A Conditional Award Letter will be sent to successful applicants that will include the amount of the award for a Real Property Development project and the amount for Start-Up Costs as well the descriptions for the next steps.**

B. Merit and Feasibility

All award decisions will be conditional and will be made for housing projects based on the overall merit and feasibility of a housing project proposal. OHA HSD reserves the right to adjust the amount of funding and negotiate modifications to the proposed housing project plan and budget prior to the execution of a ~~Housing Development Project Financing Contract (HDPFC)~~ **grant agreement and declaration of restrictive covenants as applicable and related legal documents** for the award.

C. Changes, Modifications and Clarifications

When appropriate, OHA will issue revisions, substitutions, or clarifications as addenda to this RFGA. Changes and modifications to the RFGA shall be recognized only if in the form of written addenda issued by OHA and posted at the OHA HSD Social Determinants of Health (SDOH) website:

<https://www.oregon.gov/oha/HSD/AMH/Pages/SDOH.aspx>

D. Reservation of OHA Rights

OHA reserves all rights regarding this RFGA, including, without limitation, the right to:

- Amend or cancel this RFGA without liability if it is in the best interest of the OHA to do so;
- Waive any minor informality or non-conformance with the provisions or procedures of this RFGA;
- Seek clarification of any Application;
- Negotiate the Requirements described in this RFGA;
- Amend or extend the term of any Agreement that is issued as a result of this RFGA;
- Engage Applicants by selection or procurement for different or additional Projects independent of this RFGA process and any agreements entered into pursuant hereto; and
- Reject any Application upon finding that to accept the Application may impair the integrity of the solicitation process or that rejecting the Application is in the best interest of OHA.

E. Availability of Funds

Applicants who receive a Conditional Award Letter (Awardee) should not expect to draw award funds until all documents required in the Conditional Award Letter have been submitted and are deemed satisfactory by OHA HSD.

In addition, award funds **for real property development** will only be released after Awardee has signed **a grant agreement and declaration of restrictive covenants** ~~the Housing Development Project Financing Contract (HDPFC)~~ and the conditions of both the Conditional Award Letter and the HDPFC **agreement** have been satisfied.

The ~~forgivable loan~~ **real property development** award will be disbursed to Awardee on an expense reimbursement or costs-incurred basis for release of funds upon written approval by OHA. The Awardee must submit each disbursement request for the Financing Proceeds on an OHA-provided disbursement request form.

For certain awards, OHA HSD will deliver the award funds ~~and the Trust Deed~~ to a title company and escrow account approved by both the Awardee and OHA HSD for the

project. All fees associated with the costs of filing and recording these legal documents are the responsibility of the Awardee.

F. Change to the Scope of the Project During or After Award

Funding awards will be based upon reasonable, if not entirely firm, project concepts. Limited amendments to the scope or nature of the project will be permitted with prior OHA HSD approval. The HSD Director reserves the right to revoke the award. Awardee must not make any decisions regarding a change in the project's concept without including OHA HSD in the revision process.

G. Award Reservation Period

Once the Application Selection Process is completed and an Awardee has been notified of a conditional award, the Awardee's project enters a 30-day reservation period.

During this period, the Awardee is expected to respond to all reservation conditions outlined in the Conditional Award Letter prior to the funding of the award. In the event of non-performance, OHA HSD may decide to revoke the conditional award.

OHA HSD staff may make a site visit during this Reservation Period.

H. Division's Discretion to Retain Funding

OHA HSD requires Awardees to submit all requested documents on time and to be complete and accurate. OHA HSD may withhold the release of funding for any project until all required documents are received and approved by HSD. Any project that has been awarded funding that does not show significant progress toward completion in line with the Proposed Project Schedule is subject to having funds rescinded.

I. Readiness to Proceed and Expenditure of Funds

OHA HSD expects that projects will be ready to proceed upon funding. Projects must be prepared to start major development components (e.g. close on land purchase, completion of design development documents) soon after or upon closing of funding

sources. This must be reflected in the Proposed Project Schedule submitted with your Application.

OHA HSD funds must be expended on or before May 31, 2023, **unless otherwise extended by OHA HSD**.

Projects that have not made sufficient progress in line with their approved Proposed Project Schedule may have their funding commitment withdrawn. OHA HSD will review progress through required monthly reporting.

14. APPEAL OF FUNDING DECISIONS

Applicants who do not agree with funding decisions are encouraged to contact the HSD Housing Development Coordinator. If the issue is not resolved, Applicants may submit a request for appeal of the decision to the HSD Director or designee as follows:

1. The Applicant requesting an appeal shall submit a written request to the Director or designee within seven business days after receiving the written funding decision.
2. HSD Review and Notification. The Director or designee shall approve or deny the request for an appeal and shall notify the Applicant in writing of the decision to approve or deny the requested appeal within fifteen business days of receipt of the appeal.
3. The decision to grant the appeal in favor of the Applicant for one request does not set a precedent that must be followed by HSD when evaluating subsequent requests for appeal.

15. PREVAILING WAGE RATE REQUIREMENTS

As a condition of a total award of \$750,000 or more, Awardees will be directed to secure a Prevailing Wage Rate Coverage Determination letter from the Oregon Bureau of Labor and Industries that qualifies the project as “affordable housing” per ~~Oregon Revised Statute~~ **ORS** 279C.810(2)(d), exempting the project from prevailing wage rate requirements.

If Awardee is unable to secure a determination that the project is “affordable housing,” Awardee will be required to meet all prevailing wage rate requirements per **ORS Chapter** 279C.

16. SECURING STATE INVESTMENT AND REPAYMENT PROVISIONS

REAL PROPERTY DEVELOPMENT PROJECT

To secure the award of funds, an Awardee shall enter into a **grant agreement and declaration of restrictive covenants** Housing Development Project Financing Contract a (HDPFC) and Trust Deed with OHA HSD.

The HDPFC **grant agreement** will outline the OHA HSD financing requirements. **All grant agreements will be structured with use restrictions that run with the property and contain contract claw back provisions that may require repayment of grant funds based** All awards will be structured as a 0% deferred payment loan (i.e., forgivable loan) that is forgiven on a pro rata basis for each full year the project is **not** in compliance with the **agreement** HDPFC, which shall include **requirements for both providing the requisite units of supportive housing to the target population and having the requisite occupancy rates of the target population. Except in the event of a default of the agreement, termination, waiver or amendment** of the HDPFC **agreement**, the project must meet the compliance requirements for 20 years **to not require repayment of the award assistance, and these compliance requirements will be terms of the grant agreement and declaration of restrictive covenants.** ~~to receive 100% forgiveness of the award assistance, and these compliance requirements will be terms of the Trust Deed. For example, if the project remains in compliance for 10 years, the financial obligation of a 20-year trust deed will be reduced by half in year 10. In the event of default, the “unforgiven” balance of the loan amount remaining becomes due and payable in full.~~

The equity value on the subject property, as developed, must support not only OHA HSD’s secured lien position **in the project if required by OHA HSD** and but all other secured liens filed against the property. A project that reflects a negative equity margin must **may** be **required to** be secured by additional collateral approved by OHA HSD. HSD will **may** require an appraisal of the project property prepared by an appraiser licensed by the State of Oregon.

During the term of the Trust Deed **grant agreement and declaration of restrictive covenant**, the Awardee has the option to transfer ownership. However, the new owner **must** be approved in writing by HSD prior to the transfer of title to the property and transferee will be expected to legally continue the obligations of the HDPFC **agreement**.

All requirements for both the Awardee and OHA HSD will be detailed in the HDPEFC, Trust Deed **agreement** and other legal documents that may be required by OHA HSD to secure the State of Oregon's interest in the property.

Start-Up Costs

An award for Start-Up Costs will be made as a direct grant to the Awardee. The grant will be disbursed to Awardee:

- 1) on an expense reimbursement or costs-incurred basis; or**
- 2) upon approval from OHA, the grant may be disbursed as an advanced payment for budgeted costs to be incurred.**

The Awardee must submit each disbursement request for the grant on an OHA-provided or OHA-approved disbursement request form. Advanced payments may be for partial or full amounts of budgeted costs.

OHA HSD requires Awardees to submit all documents on time and that those documents be complete and accurate. OHA HSD may withhold the release of funds until any documents requested by OHA HSD are received and approved by OHA HSD.

17. COMPLIANCE MONITORING

Awardees are required to prepare and submit written monthly reports during construction or acquisition/redevelopment phases that includes any updates to the Proposed Project Schedule, Project Development Budget, Project Operating Budget, **Start-up Costs Budget**, and other documentation that OHA HSD may reasonably require. For completed projects, Awardees must submit written quarterly reports to satisfy OHA HSD requirements of the continued use of the property for the agreed purpose as defined in the HDPEFC and Trust Deed **grant agreement and declaration of restrictive covenants**.

18. EQUITY AND INCLUSION REQUIREMENTS

Any supporting housing units funded through this application process must provide trauma-informed services that are non-judgmental, non-stigmatizing and non-coercive.

Standards must be created for initial engagement that start with an unconditional positive regard for every person.

Applicants must consider how housing efforts and services will not disadvantage people by their race, ethnicity, language, disability, age, gender, gender identity, sexual orientation, social class intersections among these communities or identities, or other socially determined circumstances.

HSD requires funded projects to provide effective, equitable, understandable, and respectful quality care and services that are responsive to following: diverse cultural health beliefs and practices, preferred languages, health literacy, and other communication needs. The project should provide outreach and services that are culturally-responsive and linguistically-appropriate by skilled staff. Additionally, the program should also ensure that staff receive training and support to design and deliver such services to the diverse target populations.

Applicants must work with diverse communities to eliminate health gaps and promote optimal health in Oregon. Collaboration and connection with people and programs will demonstrate measurable progress and substantially improve all Oregonians' health.

19. NON-DISCRIMINATION AND FAIR HOUSING REQUIREMENTS

Under civil rights and fair housing laws, it is illegal to discriminate based on race, color, sex or sexual orientation, religion, creed, national origin, age (except under 18 years), familial status, marital status, source of income, or disability, in addition to the serious and persistent mental illness that qualifies the individual for occupancy in the proposed project. Applicant must certify that they will not discriminate in service delivery or providing housing. A form for certification of non-discrimination is included in the Application Form.

Information on civil rights and fair housing laws is available at:

Oregon Revised Statute

https://www.oregonlegislature.gov/bills_laws/ors/ors659A.html

HUD

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Addendum Approved by DOJ on 07/18/22

https://www.hud.gov/program_offices/fair_housing_equal_opp

Fair Housing Council of Oregon

<https://fhco.org/>

Culturally and Linguistically Appropriate Services (CLAS) Standards:

<https://thinkculturalhealth.hhs.gov/CLAS/>

APPLICATION SUBMITTAL AND REVIEW PROCESS

Carefully review your Application before submitting it. No additional information will be accepted after submission and during the review process unless requested by HSD.

EVALUATION PROCESS

This Application process is competitive. Applications are evaluated against stated criteria and against each other. Each Application will undergo an initial Threshold Review. AN APPLICATION MISSING OR NOT PASSING ANY THRESHOLD REVIEW REQUIREMENT BELOW WILL BE REJECTED PRIOR TO REVIEW.

Applications which pass Threshold Review will then receive an Application Review. The Application Review Criteria has a total score of **315 possible points**. All Applications are evaluated independently by two review panels, the Occupancy & Services Review Panel and the Technical Review Panel. At the completion of the individual review process by each review panel, the scores of both panels will be combined to arrive at the Application's total score.

Award recommendations are forwarded to the Director who makes the conditional award decisions for a **Real Property Development Project and for Start-up Costs**. Reviewed Applications must score at least **175 points** in order to be considered for funding.

THRESHOLD REVIEW REQUIREMENTS:

Applications must pass all threshold requirements to move forward to the review committees. The Threshold Review will examine the following requirements:

1. Project Development Authorization: Resolution

A. Resolution Requirements

Applicant must include a copy of an appropriate Resolution with the applicable language as described in “Organizational Documents” below, confirming that the Applicant is authorized to apply for funds to support the proposed project by the ownership entity at the time of application. The Resolution must include language that provides:

- Authorization for the Applicant to apply to OHA HSD;
- Authorization for the development of the project, including a brief description of the project and the county it will be located in;
- Authorization for the amount of funds requested in the Application;
- Authorization to execute a ~~Housing Development Project Financing Contract (HDPFC)~~ **grant agreement with declaration of restrictive covenants**, Trust Deed and any other **legal** documents that may be required;
- Legal name of the authorized signer(s) for the Application, HDPFC **grant agreement and declaration of restrictive covenants** and any other legal documents;
- Authorization to execute documents required by the title company, if applicable.

Please Note: If the resolution designates Board Member A and Board Member B, both board members must sign all documents including the Application. If the resolution designates Board Member A or Board Member B, either board member may sign documents.

Additionally, if project ownership is vested in a legal entity other than Applicant:

- Applicant’s Board resolution must provide authorization for Applicant to apply on behalf of the ownership entity.

And

- The ownership entity must also provide a resolution by its governing body addressing the same points as above.

An example of this ownership structure might be a Section 42 Low Income Housing Tax Credit project in which Applicant is a General Partner in a Limited Partnership.

B. Form of Resolution by Organization Type

- Corporation

A Resolution must be signed by the authorized Board officer(s), authorizing the solicitation and receipt of the award for the specified project. The Resolution should state which officer(s) are authorized to sign the Application and legal documents on behalf of the corporation.

- Limited Liability Company (LLC)

A Resolution or Certificate as to Members must be signed by all members, authorizing the solicitation and receipt of the award for the specified project. The Resolution should state what Member(s) are authorized to sign the Application and legal documents on behalf of the company.

- Partnership

A Resolution must be signed by all partners at the time of application, authorizing the solicitation and receipt of the award for the specified project. The Resolution should state which Partner(s) is authorized to sign the Application and legal documents on behalf of the partnership.

- One of Nine Federally Recognized Tribes of Oregon

A Resolution must be signed by the authorized Tribal government officials, authorizing the solicitation and receipt of the award for the specified project. The Resolution should state which official(s) are authorized to sign the Application and legal documents on behalf of the Tribe.

Application must include documentation required by the Resolution requirements of this section.

2. OHA HSD Funding Compliance

Applicants that have previously received funding from OHA HSD for any type of residential housing must:

a. Be in compliance with all funding program requirements.

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- b. Have not defaulted on any OHA HSD funds.
- c. Have no finding of non-compliance.

This threshold item will be confirmed by OHA HSD housing staff. No submission is required.

3. Letter(s) of Endorsement

Applicant must provide the appropriate Letter(s) of Endorsement as described above in Section 12 above.

4. Applicant's Designation of Confidential Materials (Attachment C of Attachments to the Application Form)

Application must identify materials exempt from public disclosure and fill out the form. If no materials qualify, please insert "NA" on the form.

5. Authorization to Apply (Application Form)

Authorized person(s) must have signed the Authorization to Apply on page 5 of the Application Form and Applicant must have supplied all required information in the Application Form. In addition, Application must include documentation required by the Resolution requirements of Section 1, Project Development Authorization: Resolution, above.

6. Compliance Period & Securing of State Investments Acknowledgement (Application Form)

Authorized person(s) must sign the Acknowledgements on page 5 of the Application Form that provides the following:

- Acknowledgement by Applicant of their commitment to provide housing and services for the Compliance Period of not less than 20 years.
- Acknowledgement by Applicant of their understanding that a Housing Development Project Financing Contract (HDPFC) and Trust Deed **grant agreement and declaration of restrictive covenants** will be executed to secure OHA HSD funding and that a lien will be filed against the project site for the Compliance **P**eriod.

7. Non-Discrimination Certification (Application Form)

Authorized person(s) must certify by their signature on page 6 of the Application Form that all eligible individuals shall be considered for residency and services without regard to race, color, sex or sexual orientation, religion, creed, national origin, age (except under 18 years), familial status, marital status, source of income, or disability in addition to the serious and persistent mental illness that qualifies that individual for residency and services.

APPLICATION REVIEW SUMMARY CRITERIA

Rating criteria for the RFGA is summarized in the tables below.

Threshold Review:	
<p>1. Project Development Authorization: Resolution</p> <p>Board resolution confirming that Applicant is authorized to apply for funds to support the proposed project</p>	Required
2. OHA HSD Funding Compliance	Confirmed by HSD staff
<p>3. Letter(s) of Endorsement</p> <p>Letters required if Applicant is not one of the Nine Federally Recognized Tribes of Oregon:</p> <ul style="list-style-type: none"> • CCO Letter of Endorsement • CMHP Letter of Endorsement <p>Letter required if Applicant is one of the Nine Federally Recognized Tribes of Oregon:</p> <ul style="list-style-type: none"> • Tribal Health Program or Tribal Behavioral Health Program Letter of Endorsement 	Required
4. Applicant's Designation of Confidential Materials- Attachment C of Attachments to Application Form	Required

5. Authorization to Apply (Application Form)	Required
6. Compliance Period & Securing of State Investments Acknowledgement (Application Form)	Required
7. Non-Discrimination Certification (Application Form)	Required

Application Review Criteria:	Max Points
Location	40
Occupancy	
1. Target Population Residents	40
2. Equity & Inclusion	40
3. Collaboration	30
Total Points Available for Occupancy	110
Services	
1. Direct Services	35
2. Community Resources & Supports	30
Total Points Available for Services	65
Housing Development & Operation Capacity	
1. Applicant Qualifications & Experience	25
2. Proposed Project Site	15
3. Development Process	15
4. Development Team	15
5. Finance & Budget	15

6. Asset & Property Management	15
Points Available for Capacity Responses	100
Maximum Total Points Available	315

Applications will be evaluated on how well they meet the Application Review Criteria listed above. Criteria are listed in order in which they are presented in the Application and not in order of importance.

If any documentation is missing, incomplete, or inconsistent with information given in any other sections of the application, the reviewers will consider the discrepancy in the final scoring of the Application. Errors or discrepancies within the Application may result in a lowered score and/or cause the inclusion of reservation condition(s) if the Application is awarded funding.

INFORMATION ON NARRATIVE QUESTIONS

This section of the Application Notice provides information on the Narrative Questions found in the Application Form. Responses will be entered on that Form

It is important that Applicants consider in your responses how the proposed project will address the need to serve the target population and ensure it is inclusive of people from culturally and linguistically diverse communities.

Responses should be consistent with the OHA Health Equity Definition found on page 1 of this Notice to ensure people are not disadvantaged by their race, ethnicity, language, disability, age, gender, gender identify, sexual orientation social class, intersections among these communities or identities or other socially determined circumstances.

Below are overviews of the Narrative Questions presented in the Application Form.

LOCATION

Applicant shall indicate whether the planned site for the proposed project is located in a rural area of the state. Rural is defined as ten or more miles from the city limits of a population center of 40,000 people or more (Portland, Eugene, Salem, Gresham, Hillsboro, Bend, Beaverton, Medford, Springfield, Corvallis, Albany, Tigard, Lake Oswego). Proposed project locations meeting this definition for rural will receive 40 points; project locations not meeting this definition for rural will receive no points for this item.

OCCUPANCY

Applicant will provide information on who prospective residents will be and how the proposed housing will benefit these individuals, supporting their occupancy in community-based rental homes.

1. Target Population Residents

- Describe the prospective residents and where they currently are residing, including living situations that qualify as being unhoused.
- How will residing in the proposed project benefit these individuals?
- Describe how Applicant will provide assistance and support to overcome barriers often experienced by the target population (e.g poor credit, criminal background, lack of funds), including individuals from diverse and underserved community based on race, ethnicity, and gender, to mitigate those barriers in order to secure a unit.

2. Equity and Inclusion

The provision of assistance and support to overcome barriers experienced by people to secure housing is crucial.

Applicant will need to discuss fair housing and inclusion efforts, experience and resources in the community to meet the individualized needs of residents to overcome

the unique barriers faced by race, ethnicity, language, disability, age, gender, gender identity, sexual orientation, social class intersections among these communities or identities, or other socially determined circumstances. See questions.

Applicants are encouraged to use the Health and Human Services/Office of Minority Health's Culturally and Linguistically Appropriate Services (CLAS) Standards as a resource.

- CLAS is about respect and responsiveness: Respect the whole person and Respond to the person's health needs and preferences. Applicants are encouraged to create a respectful and welcoming sense of belonging within the community.
- Integrating CLAS Standards into the project's operations policies and procedures will improve the quality of services provided to all people, which will ultimately help reduce health disparities and achieve health equity.
- An Applicant's affirmative fair housing policies and procedures can also demonstrate efforts of inclusion and equity.

3. Collaboration

Applicant will need to explain their plans to work with the appropriate entities with the intent to effectively transition individuals to the proposed housing from the Oregon State Hospital, a licensed residential setting or a setting that qualifies as "unhoused".

If Applicant is one of the Nine Federally Recognized Tribes of Oregon, Applicant will need to explain plans to work with the Tribal Health Program and/or Tribal Behavioral Health Program.

If Applicant is not one of the Nine Federally Recognized Tribes of Oregon, the appropriate entities to collaborate would also include the following:

- Coordinated Care Organization (CCO)
- Community Mental Health Program (CMHP)

Scoring is based on the collaborations described above. If Applicant plans to collaborate with any or all of these entities please include this in your response.

SERVICES

Applicants must describe their provision of informed approaches and recognized best practices in mental health treatment and the provision of services. Applicants must also describe their experience and familiarity with the application of resident-involved planning and the inclusion of peer mentors. Access to the services of peer mentors for the target population at-is a requirement.

If Applicant does not have the capacity for direct delivery of services for the target population, Applicant may secure services through a partnership with one or more local service providers with the experience to provide services for the target population. Applicant should describe this relationship in the narrative response.

OHA HSD expects that Applicant will design and manage support services that will actively engage target population residents and be readily available on a voluntary basis and that Applicant will design and manage support services that will actively engage target population residents. The service provision philosophy should support recovery with the goal of residents living independently in the community.

1. Direct Services

- Applicant must describe their plan for proposed culturally appropriate and responsive services that will be available on-site to target population residents and how these services will be offered to residents on a voluntary basis.
- Applicant must detail how resident-involved planning will assist target population residents' transition to increased self-sufficiency, creating relationships between residents and staff and actively engage them in voluntary services.
- Applicant must describe their planned use of crisis and early intervention resources for responding to problems encountered by a resident such as being at risk for either eviction or reentering a licensed residential or hospital setting.
- Applicant must describe the role of peers in occupancy and services functions and how the support of peers will enhance the stability of residents in their community. Please note that the inclusion of peer mentors is a program requirement.

2. Community Resources and Supports

- Applicant must describe nearby community amenities, mental health treatment providers, support groups and other services that will be available to target

population residents, including physical and behavioral healthcare as well as culturally responsive and social opportunities.

- Applicant must describe how Applicant will foster opportunities for “natural supports”. These are personal associations and relationships typically developed in the community that enhance the quality and security of life for people. Natural supports include, but are not limited to: family relationships, friendships reflecting the diversity of the neighborhood and the community; association with fellow citizens or employees in regular community settings and work places; and associations developed through participation in clubs, organizations, and other civic activities.
- Applicant must describe how Applicant will ensure that target population residents can access off-site services if those services are not readily available within a reasonable distance from the proposed supportive housing.
- Applicant must describe how Applicant will meet the individualized needs of residents by working with these entities:

If Applicant is one of the Nine Federally Recognized Tribes of Oregon:

- ◆ Tribal Health Program and/or Tribal Behavioral Health Program

If Applicant is not one of the Nine Federally Recognized Tribes of Oregon:

- ◆ Coordinated Care Organization (CCO)
- ◆ Community Mental Health Program (CMHP)

HOUSING DEVELOPMENT & OPERATION CAPACITY

Projects will be scored on the capacity of the Applicant to undertake the development and operation of the proposed project.

1. Applicant Qualifications and Experience

- Applicants must describe their experience developing comparable housing for the target population. If Applicant does not have the requisite experience and skills needed to successfully develop the proposed project, explain how Applicant will access/secure those resources. This may be accomplished through partnerships, consultant services or other arrangement.

- Applicants must describe the expertise of the Applicant's non-profit board members or for-profit officers and principal members in real estate development and operations.

2. Proposed Project Site

Applicants must describe the proposed site and how the site location will benefit the target population. If a site has not been identified, provide a description of the proposed area for siting and how that location will benefit the target population.

3. Development Process

Applicant must present a proposed project schedule of development activities that includes the following:

- Description of how Applicant will manage the development process.
- List of development activities, either completed, underway or in the planning stage.

Included in this section is completion of the Proposed Project Schedule (Attachment A of Attachments to the Application Form).

4. Development Team

Applicant must demonstrate capacity to undertake development of the proposed project through the experience and expertise of the Development Team. Applicant must provide information on the team to ensure that the appropriate roles and responsibilities for the proposed project are complete including the ability to support the cultural and linguistic needs of the target population.

5. Finance & Budget

Applicant must describe how the funding for development, operation, **and Start-Up Costs** will come together. ~~Four~~ **Five** project pro forma Excel forms are provided in Attachment B of the Attachments to the Application Form. (Sources of Funding; Uses

of Funding; Income Budget; Expenses Budget, **and Start-Up Costs Budget**) shall be completed and attached to the Application.

- Applicants should describe need for HSD resources and, if appropriate, how those funds will leverage other funding sources.
- Applicants must provide information on sources for development funding planned for the development budget.
- Applicants must describe how Applicant will determine that rents are affordable for the target population and include information on any project-based rent subsidies that will contribute to affordability.

Please Note: Applicants receiving a Conditional Award of Funds will be required to provide copies of executed commitment letters and letters of interest for all funding sources or otherwise provide proof of the viability of a funding source included in the project budget.

6. Asset & Property Management

Applicant must demonstrate the experience and ability to effectively manage the project once operational including the operation of housing for the target population.

- Applicant must describe the experience of Applicant in the operation of housing for the target population.
 1. If Applicant plans to self-manage the housing, Applicant shall describe their experience managing affordable housing that includes special needs populations.
 2. If Applicant plans to contract for housing management, Applicant shall describe that entity's experience; if contractor is not yet selected, Applicant shall describe how Applicant will determine if contractor has the requisite experience to manage the proposed population.

REQUIREMENTS FOR SUPPORTIVE HOUSING FUNDING APPLICATION

1. Complete the Application Form.

2. Application must provide the requested information in the Project Narrative section. Use 14-point type font. Please insert your narrative responses into the boxes provided with each question on the Application Form. The boxes will expand as text is entered into it.
3. Save all Application documents as one PDF. Be sure the PDF includes the pages requiring a signature.
4. Only complete Applications will be accepted.
5. Email the PDF of the completed Application to:

Richard Malloy, HSD Housing Investment Coordinator

RICHARD.F.MALLOY@dhsosha.state.or.us

All Applications and materials must be received by email no later than ~~11:59 pm July 29, 2022.~~ **December 30, 2022.**

If you have questions, need copies of any Application documents, or would like technical assistance, check the OHA HSD Social Determinants of Health (SDOH) website at:

<https://www.oregon.gov/oha/HSD/AMH/Pages/SDOH.aspx>

ATTACHMENT A

DEFINITION OF

SERIOUS AND PERSISTENT MENTAL ILLNESS

*“Serious and Persistent Mental Illness” means the current Diagnostic and Statistical Manual of Mental Disorders diagnostic criteria for at least one of the following conditions as a primary diagnosis for an adult age 18 or older:

(a) Schizophrenia and other psychotic disorders; (295.xx – 297.3 – 298.8 – 298.9)

(b) Major depressive disorder; (296.xx)

(c) Bipolar disorder; (296.xx)

(d) Anxiety disorders limited to Obsessive Compulsive Disorder (OCD) and Post Traumatic Stress Disorder (PTSD); (300.3 – 309.81)

(e) Schizotypal personality disorder; (301.20) or

(f) Borderline personality disorder. (301.83)

*Note: definition is from OHA’s OAR 309-036-0105(13) with annotations of the Diagnostic and Statistical Manual of Mental Disorders number added in parentheses.