OHCS Training
Mental Health Housing
2017 Notice of Funding Availability

Welcome
NOFA Training Agenda

• Welcome
• Dates to Remember
• NOFA Application Process
• NOFA Document Overview
• SMI/SUD & Crisis Respite NOFA Submission Overviews
  • Threshold Detail
  • Competitive Scoring Detail
  • Program Submission
  • Program Highlights
• General Reminders
• Upcoming Dates to Remember
• Questions
NOFA Process – Dates to Remember

• Release date: February 15th
• Questions should be posed to:
  • MFNOFA@oregon.gov  *Please include the NOFA number or name (MH Housing) in the subject line of the email*
  • Darcy Strahan  Darcy.Strahan@state.or.us
  • John Wright  John.E.Wright@oregon.gov
• FAQs will be published at regular intervals
• Questions until: April 7th
• Application due date: April 21st
NOFA Process – Technical Assistance

• Corporation for Supportive Housing (CSH) will provide 2 hours of Technical Assistance for applicants of the Mental Health NOFA for supportive and supported housing.
  • Will include advice on partnership development (as appropriate) particularly with services and property management, as well as overall operations and services of this housing.
  • It will not include any assistance in completing applications in response to the Mental Health NOFA.
• CSH staff Heather Lyons and Steven Shum will be available to provide this TA from March 7th, 2017-July 31st, 2017.
• In order to receive this technical assistance; you must contact John Wright via email at John.E.Wright@oregon.gov
NOFA Allocations and Application Parameters

Mental Health Housing NOFA will allocate $16,238,421 Million in Mental Health Housing Funds

Applicants must be developing one of the identified types of housing:

1. Individuals with serious mental illness (SMI) who are able to live independently in supported and/or supportive housing
2. Individuals with substance use disorder (SUD)
3. Crisis respite housing for individuals with SMI

Applicants may only apply for one phase of a project

Applicants may not submit more than three applications for this NOFA
NOFA Housing Type Definitions

- **Crisis Respite Housing**: residential setting that provides associated services to individuals with SMI. Occupancy focus for short-term stabilization to be 14 days but limited to a maximum of 30 days.
  - Short-term crisis stabilization beds
  - Subacute beds
- **Supported Housing**: permanent affordable housing that offers individuals independent housing integrated into the community in a private, secure setting. Participation in services voluntary for SMI, required for SUD. For SMI: No more than 25% can be set aside for placement by a SMI Supported Housing Provider.
- **Supportive Housing**: single-site housing in which all or a majority of tenants who receive support services are individuals with a SMI and/or SUD who live together in a single building or complex with or without on-site support services. If designated as transitional occupancy limited to no more than 2 years. Participation in services voluntary for SMI, required for SUD.

See Pages 4-5 of the Crisis Respite MH Housing NOFA and Pages 5-7 of the SMI/SUD MH Housing NOFA for more description.
Funding Set-Asides

Mental Health Housing Funds are set-aside for different activities:

<table>
<thead>
<tr>
<th>Amount</th>
<th>Description</th>
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<tr>
<td>$16,238,421</td>
<td>in Mental Health Housing Funds</td>
</tr>
<tr>
<td>$9,541,344</td>
<td>in SMI Supported Housing</td>
</tr>
<tr>
<td></td>
<td>- $4,582,469 million in Metro;</td>
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<tr>
<td></td>
<td>- $4,958,875 million in Non-Metro</td>
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<td>$2,500,000</td>
<td>in SUD Supported Housing</td>
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<td>$2,247,161</td>
<td>in SMI and/or SUD Supportive Housing</td>
</tr>
<tr>
<td>$1,949,916</td>
<td>in Crisis Respite Housing</td>
</tr>
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</table>
Funding Request Limits

• **SMI/SUD** Applicants may request up to $50,000 of available MHHF Funds for all eligible affordable housing units in any proposed Project for which an Application is permitted under this NOFA.

• **Crisis Respite** Applicants may request up to $50,000 of available MHHF Funds per bed. Dormitory style projects do not qualify.
Part 1: Application Data Submission

Part 2: The Applicant and Project Information Submission

Part 3: The Threshold Submission
   Readiness to Proceed
   Development Team Capacity
   Ownership Integrity

Part 4: Competitive Scoring Submission
   Questionnaire
   Pro Forma
   Financial Assumptions
   Resident Services Plan
   Tenant Survey & Relocation
   Architectural Submission Attachments
   Capital Needs Assessment
   Replacement Reserve Analysis
   Construction Hard Cost Estimate
The Crisis Respite NOFA Application Submission

Part 1: Application Data Submission

Part 2: The Applicant and Project Information Submission

Part 3: The Threshold Submission

  Readiness to Proceed
  Development Team Capacity
  Ownership Integrity

Part 4: Competitive Scoring Submission

  Questionnaire
  Construction Budget
  Financial Assumptions
  Resident Services Plan
  Architectural Submission Attachments
  Capital Needs Assessment
  Replacement Reserve Analysis
  Construction Hard Cost Estimate
Part 1: Application Data Submission Attachments

1.1: NOFA Cover Sheet
1.2: Application and Charge Transmittal
1.3: Authorization and Acceptance Signature Authority Form
1.3A: Board of Directors Resolution (if required)
1.4: Organizational Documents Attachment
1.5: Application Submission Checklist
Part 2: SMI/SUD Applicant and Project Information Submission

The following information is required on the form:

- Applicant and Project information
- Development Team information
- OHCS-Based Program Funding Requests
- Unit Type and funding Program designation
- Target Population
- Rent Table
- Site and Building information

This information is critical to providing a thorough snapshot of the project. It is used throughout the review process to orient the reader to the project highlights.
Part 2: Crisis Respite Applicant and Project Information Submission

The following information is required on the form:

• Applicant and Project information
• Development Team information
• OHCS-Based Program Funding Requests
• Project Type
• Project Description
• Site and Building information

This information is critical to providing a thorough snapshot of the project. It is used throughout the review process to orient the reader to the project highlights.
Part 3: Threshold Submission

3.1: Readiness to Proceed
Letters of Support from the Coordinated Care Organization
Letter of Support from the Community Mental Health Program or Tribal Authority

3.4: Development Team Capacity

3.5: Ownership Integrity

No additional submission is required for the Program Compliance Threshold review
Part 3.1: Readiness to Proceed

A: Zoning & Site Control:

Project must be zoned for intended purpose; provide Certification.

Site control is not required at the time of application.

B: Development Schedule

Applicant must complete OHCS form

Part 3.2: Letters of Support from the Coordinated Care Organization AND
Part 3.3: Letter of Support from the Community Mental Health Program or Tribal Authority

Letters must be included to pass threshold and move to scoring.
Part 3.4: Development Team Capacity

A: Capacity Worksheet

This form contains all the key categories that the reviewers need to properly evaluate the sponsor’s experience and capacity.

When a sponsor notes that they do not have experience or capacity in a certain area, they must indicate the action plan that will mitigate this risk.

B: Real Estate Holdings

This is a form that identifies all the real holdings of the sponsor or sponsors and what their current balances, values, net income, LTV’s and debt service covers are.

To the extent that a project listed on the schedule has a material problem, such as negative cash flow or < 1.0 Debt Service Cover, the sponsor must provide a written explanation of the situation and its mitigation plan.
Part 3.5: Ownership Integrity

- Ownership Integrity questionnaire; these are financial representations regarding such matters as fraud conviction, bankruptcy, and debarment.
SMI/SUD Competitive Scoring Submission

Need, Impact & Capacity
4.1: Questionnaire

Financial Viability
4.2: Pro Forma
4.3: Financial Assumptions
4.4: Resident Services Plan
4.5: Tenant Survey & Relocation
4.6: Architectural Review, attachments
4.7: Capital Needs Assessment (CNA)
4.8: Replacement Reserve Analysis
4.9: Construction Hard Cost Estimate
Crisis Respite Competitive Scoring Submission

Need, Impact & Viability
4.1: Questionnaire

Financial Viability
4.2: Construction Budget
4.3: Financial Assumptions
4.4: Resident Services Plan
4.6: Architectural Review, attachments
4.7: Capital Needs Assessment (CNA)
4.8: Replacement Reserve Analysis
4.9: Construction Hard Cost Estimate
## Competitive Scoring Overview

<table>
<thead>
<tr>
<th>Weight</th>
<th>Category</th>
<th>Weight</th>
<th>Category</th>
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<tbody>
<tr>
<td>10%</td>
<td>Need</td>
<td>10%</td>
<td>Occupancy</td>
</tr>
<tr>
<td>60%</td>
<td>Impact</td>
<td>60%</td>
<td>Services</td>
</tr>
<tr>
<td>15%</td>
<td>Capacity</td>
<td>15%</td>
<td>Capacity</td>
</tr>
<tr>
<td>15%</td>
<td>Financial Viability</td>
<td>15%</td>
<td>Financial Viability</td>
</tr>
</tbody>
</table>

### SMI/SUD

### Crisis Respite
4.1: Competitive Scoring Questionnaire

Notes / Reminders:
- “Need” data is available online on NOFA page, the questionnaire asks you to just specify county
- Make sure your response is thorough. Remember your audience, reviewers will be reading a lot of applications – longer narratives does not mean higher scores. Relay your expertise but be as concise as possible.
SMI/SUD Part 4.2: Pro Forma

Updated Pro Forma must be used. Available on the website in a zipped folder, includes directions for using / unzipping the folder to access the file.

Highlighted areas in green to fill in project data.
Crisis Respite Part 4.2: Construction Budget

For Crisis Respite only the following data is required for application:

- Sources
- Uses of Funds
- Income (Expected Zero dollar values. Type field not required.)
- Expenses

Crisis Respite does not require the use of a pro forma. However it does require the use of the “Crisis Respite Construction Budget”. If you have not downloaded the Construction Budget from the NOFA website it can be located at the following location: http://www.oregon.gov/ohcs/Pages/nofa-2017-mental-health-housing-crisis-respite.aspx
Part 4.3: Financial Assumptions

- Without requiring market studies or appraisals, this is a critical area of information for the reviewers.

- For the SMI/SUD NOFA the rent and expense information should be detailed and concise. Cite your sources but do not attach, tables, surveys, etc.

- **New Requirement** for the Crisis Respite NOFA application: the 30 year financial viability question and 5 year estimated operating expenses should be answered in question 10. Be as detailed and concise as you can.
Part 4.4: Resident Services Plan

• OHCS has long recognized resident services as an integral part of the ongoing success of affordable housing developments.

• Appropriate services are important and empowering to residents and they bring benefit to project management, to the project sponsor/owner, and to the local community as well. For projects designated for individuals with SMI these services are voluntary to the tenant, but must be provided. For SUD projects these services are mandatory participation of the tenant.

The anticipated outcomes and overall goals of the Resident Services Plan are:

• Through coordination, collaboration, and community linkages, residents will be provided the opportunity to access appropriate services which promote self-sufficiency, maintain independent living, and support them in making positive life choices; and

• To maintain the fiscal and physical viability of the development by incorporating into the ongoing management the appropriate services to address resident issues as they arise.
SMI/SUD NOFA Applications Only
Part 4.5: Tenant Survey and Relocation

A: Existing Tenant Survey

C: Tenant Relocation Questionnaire
Part 4.6: Architectural Review

For All New Construction Projects and Rehabilitation Projects That Include Any New Construction

- Vicinity map
- Context photos
- Preliminary site design and development plan
- Required site accessibility and visitability features

For All Rehabilitation Projects

- Rehabilitation Scope of Work
- Pest and Dry Rot Inspection Report
- Roof Inspection Report
- Estimate of probable rehabilitation cost
- Replacement Reserve Schedule

The Department also requires applicants of acquisition and rehabilitation projects to complete a thirty (30) year replacement schedule as part of the CNA.

Rehabilitation Assessment Criteria

- Critical repair items
- Two (2) year physical needs
- Long term physical needs
- Analysis of reserves for replacement
Part 4.7: Capital Needs Assessment (CNA)

Within 12 months

Part 4.8: Replacement Reserve Analysis

Excel workbook

Part 4.9: Construction Hard Cost Estimate

A: Cost Estimates

B: Visitability Exemption Request
General Reminders

• Follow the order of the application submittal checklist completely and accurately.
• Make sure to provide all requested material in the order indicated on the checklist.
• Submit only the documents that are listed on the application submittal checklist.
• Use divider tabs to identify each part.
• Number every page of the application.
• When answering narrative questions, do not remove the question, question number, or the box provided.
• Keep responses within the stated length and font size limits.
• Do not double-space your text responses.
• Always mark the project’s location on maps and context photos.
• Identify acronyms used by your organization.
• Answer questions completely. Don’t assume the reader is familiar with your organization or project.
• Double-check that each copy of the application includes all the same documents as the original.
NOFA Process – Upcoming Dates to Remember

Release date: February 15th

Questions until: April 7th
MFNOFA@Oregon.gov

Close date: April 21st
All applications must be in the OHCS offices by 4pm on the close date; they must be complete; post marks do not apply

State Housing Council Presentation: TBD meeting
Questions and Answers