



# Project Development Manual (PDM)

## Design & Construction Standards

*Version: 2016.06.01*



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# Project Development Manual (PDM)

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***Vision:***

*All Oregonians have  
the opportunity to  
pursue prosperity  
and live free from  
poverty.*

**Oregon Housing & Community Services**

# Preface : PDM/Program Applicability i

## Applicability of the PDM

All projects receiving funding via one or more of the OHCS Programs listed in Table AA below must comply with the Agency’s Project Development Manual (PDM). As of the version date on this edition of the PDM, the Agency has established different levels of Applicability of the PDM to projects based on the Program funding they may receive. The current degree of PDM applicability to each Program is defined in **Table AA** below.

**Important:**

Table AA defines only those Parts of the PDM that do not apply to the listed Program, in other words, all Parts of the PDM that are not listed in Table AA as an Exception remain applicable to the listed Program.

In cases where funding is conditionally awarded from multiple Programs, the Program requiring the higher degree of applicability of the PDM shall define how the PDM is administered with that project.

<b>Table AA</b>	
<b>PDM Section <u>Exceptions</u> based on Funding Program</b>	
<b>Funding Program</b>	<b>PDM Applicability Exceptions (Non-Applicable Sections of the PDM)</b>
<b>1</b> <ul style="list-style-type: none"> <li>▪ HOME Investment Partnerships Program</li> </ul>	<b>No Exceptions</b>
<b>2</b> <ul style="list-style-type: none"> <li>▪ 9% Low Income Housing Tax Credit (LIHTC)</li> <li>▪ General Housing Account Program (GHAP)</li> <li>▪ Housing Development Grant Program (HDGP)</li> <li>▪ Oregon Affordable Housing Tax Credit (OAHTC)</li> <li>▪ Low Income Weatherization Program (LIWP)</li> </ul>	<p style="text-align: center;">Section <u>2</u> Section <u>7</u> And the following Parts of Section 5a: Part <b><u>5a.06</u></b>, Part <b><u>5a.08</u></b> Parts <b><u>5a.08.01 through 5a.08.03</u></b>.</p> <p>Additionally, Section 5b does not need to be submitted to the Agency but shall be applicable only as a guide to the Owner’s Project Team.</p>
<b>3</b> <ul style="list-style-type: none"> <li>▪ 4% Low Income Housing Tax Credit (LIHTC) &amp; Conduit Bonds</li> </ul>	<p>Identical to line 2 above with the added Exception of:</p> <p style="text-align: center;">Section <u>6</u>.</p>

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**1.01 Overview:**

**OHCS Project Development Manual (PDM) and Project Development Process (PDP)**

The three primary areas of the Agency’s project based engagement are listed below. All three areas are closely connected with varying degrees of overlapping responsibility and coordination. The focus of this Manual (the PDM) is on Agency engagement in part II; OHCS Project Development Process (PDP) which details how the Agency engages with project stakeholders in the direct project development tasks of; (a) project scope development, (b) project design, and (c) project execution (construction). See Section 2 of this Manual for detailed information on the Agency’s PDP.

1. Financial Structuring & Program Eligibility Maintenance
2. OHCS Project Development Process (PDP) Engagement
3. Post-Construction Program Compliance

For Guidance with items 1 or 3 listed above, refer to the Program Manual associated with the Program of interest or contact the OHCS Loan Officer or Compliance Officer assigned to the specific project.

**1.02 Agency Priorities & Goals for Housing**

The Agency supports the development of quality affordable housing that is efficiently and thoughtfully designed, safe, durable, supports and improves upon the aesthetics and living environment of the community, empowers and enhances the self-esteem of the residents it serves, and contributes positively to quality of life in Oregon. Meeting this goal of creating and preserving quality affordable housing projects requires careful design and skilled project management engagement by all project stakeholders. Further, engagement of experienced, highly skilled, and knowledgeable construction professionals during the project’s construction phase is critical to achieving a quality outcome. The PDM provides a guiding framework for the Agency to supportively engage with the Project Owner and other project stakeholders in successfully navigating the often complex and multi-layered regulatory landscape associated with public funding while maintaining focus on these collectively held project goals.

**1.03 Applicability of the PDM**

See Preface : PDM/Program Applicability at the beginning of this Manual (Section i).

**1.04 OHCS Management of the PDP**

When the Agency requires compliance with its Project Development Process ((PDP) – See Section 2 of the PDM), the PDP is managed by one of the Agency’s Architects. In such cases, an OHCS Architect is assigned to each project if/when a project receives a conditional award of funding via one or more of the Programs administered by the Agency. The OHCS Architect will make contact with the Project Owner early in the Agency’s Project Development Process (PDP).

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# OHCS Project Development Process (PDP) **2**

## 2.01 \_\_\_ Section Overview

Section 2 of the Project Development Manual (PDM) outlines the process OHCS uses to administer its project quality standards from the initiation of design through to the end of Construction. The Agency refers to this process as the Project Development Process (PDP). OHCS Construction Phase involvement is further and more specifically defined in Section 7 of this Manual.

## 2.02 \_\_\_ Applicability of this Section

Unless exempted from all or portions of the requirements defined in this Section of the Project Development Manual per part 2.03 below, the Owner's Project Development Team must follow the Project Development Process and the document submittal provisions outlined in this Section of the PDM.

## 2.03 \_\_\_ Exemption from Requirements of this Section

Refer to the Preface at the beginning of this Manual (Section i).

## 2.04 \_\_\_ Definitions

The definitions provided below are critical to using this section as well as other sections of the PDM. These definitions are provided again in Appendix -A of this Manual.

### **PDD : Project Development Documents**

For the purpose of this manual the term PDD shall refer to any Architectural or Construction related document, usually associated with the document Submittals that are described in this section of the PDM. Examples include but are not limited to: Construction Drawings, Technical Specifications, Schedules, Cost Estimates, Contracts, Reports, Photos, Certificates, Etc.

### **PDM : Project Development Manual**

An Agency published guide containing the Architectural and Construction related requirements and expectations for successful housing development undertaken in partnership with the Agency and other funding program stakeholders.

### **PDP : Project Development Process**

The Agency's process for collaborating with its development partners in achieving mutually beneficial outcomes in the production of quality housing as it is defined in this Section of the PDM.

### **RCL : Reservation and Conditions Letter**

A project-specific, comprehensive list of Agency and program based conditions for successfully maintaining funding eligibility for the full duration of the project.

## 2.05 \_\_\_ Starting Point of the Project Development Process : Receiving the RCL

After an application for funding<sup>1</sup> has been submitted to the agency and upon the Agency's conditional award of funding via one or more of the programs the agency administers, a Reservation and Conditions Letter (RCL)<sup>2</sup> is issued by OHCS to the Owner. The RCL starts the Project Development Process (PDP) by outlining the Project Owner's obligations for successfully meeting the often complex mix of funding source requirements for any given project. All of the agency's primary conditions for approval of project

## 2 OHCS Project Development Process (PDP)

funding including meeting all of the required Architectural and Construction related Document (PDD)<sup>3</sup> submittal requirements are listed in the RCL making it the Agency's official master guidance document for each project.<sup>4</sup> This Manual, the PDM, focuses only on the Architectural and Construction related document submittal requirements for the project which are listed again in this section of the PDM and where they are discussed in more detail.

### 2.05 Footnotes:

1. The process of applying for funding in response to one or more of the Agency's NOFA publications is preliminary to, and therefore not considered part of the Project Development Process. Refer to the NOFA Application associated with the funding programs of interest for information on the Application submittal process and associated document requirements.
2. As described in the agency's General Policy and Guidance Manual (see OHCS website), only projects selected for funding through the agency's NOFA application and review process will receive an OHCS issued, project specific Reservation and Conditions Letter.
3. See Definition of PDD in part 2.04 of this section.
4. **The Project Owner must carefully review their project specific RCL for the presence of PDD submittal requirements that may not be listed in this section of the PDM.** The PDM is a general guidance manual that pertains to all OHCS projects. Each individual project, however, is unique and may, therefore, have additional PDD submittal requirements not listed in the PDM. Such instances are unusual but when they do occur any unique document submittal requirement will be listed in the project's RCL.

### **2.06 Primary Phases of the Project Development Process (PDP)**

A generalized diagram of the PDP is given in Part 2.12 of this Section. For the purposes of defining the agency's involvement in any given project, the PDP is conceptually broken in to two phases; Design and Construction. Each phase has a required number of OHCS required PDD submittals. The required submittals are further defined in parts 2.07 and 2.08 of this section.

### **2.07 Design Phase Project Development Document (PDD) Submittals**

Four PDD submittals (1 through 4) are required during the project's Design Phase as given in 2.07.01 through 2.07.04 of this section. As shown in the diagram in Part 4.12 of this Section, the Design Phase of the project begins at the point when a Reservation and Conditions Letter (RCL) is issued to the Project Owner and it concludes at Finance Closing.<sup>1</sup>

### 2.07 Footnotes:

1. Some projects do not have a 'Finance Closing'. In such cases, 'Construction Start' defines the end of the Design Phase of the project.

## OHCS Project Development Process (PDP) **2**

### 2.07.01\_Submittal-1: Reservation and Conditions Letter (RCL) Priority Response

A number of PDD's are considered critical for determining the viability and scope of a project and are therefore considered "Priority Response" items or documents. The documents listed below fall into this category and are reviewed by the Agency early in the Design Phase as part of the Agency's RCL Priority Response Review.

#### 1) Required Documents

##### 1a) Schematic Design Drawings

Schematic Drawings are typically at a level of approximately 20%-25% complete. Drawings should include general site plan information, schematic floor plan layouts, unit types and layouts, exterior building elevations, basic building code and zoning code information.

Depending on the level of Site Plan development that existed at the time of the Funding Request Application, the same Site Plan without additional development will likely satisfy the Site Plan requirement for this submittal.

##### 1b) Phase I Environmental Assessment

See Section 3.03 the PDM

##### 1c) Radon Assessment

See Section 3.03 the PDM

##### 1d) Fully Executed Owner/Architect Contract

Special Note for Projects with HOME Funding: The Contract must refer to the HOME Contract Provisions as being made a part of the Contract and they must be incorporated into the Contract as an exhibit. The HOME Contract Provisions can be obtained from the OHCS Loan Officer assigned to the project. Submittal of the Owner/Architect Contract may be delayed with approval of such request being made on a case-by-case basis by the Agency.

##### **Important**

Prior to signing any contract related to their project, the Project Owner must contact the OHCS Loan Officer assigned their project to confirm appropriate timing of executing (signing) the contract. Some funding programs such as HOME have strict timing requirements related to contracts that if not carefully followed can jeopardize funding eligibility.

##### 1e) Current Project Schedule

The Current Project Schedule is not the same as the "Proposed Project Timetable" that was requested by OHCS in the NOFA. The Current Project Schedule should, at a minimum, show the full project timeline from the time of Application for funding submission to OHCS through to Construction Completion and should be submitted in Gant Chart format. In addition to identifying the critical phases and milestones that the Owner's Team has identified for the project, the Project Schedule must clearly identify the following:

## 2 OHCS Project Development Process (PDP)

- i) Projected placement within the project timeline of the seven (7) OHCS Submittals identified in the diagram given in Part 2.12 of this Section of the PDM.
- ii) Projected placement within the project timeline of a Stormwater Management Plan (SMP) Submittal to OHCS.  
Because Stormwater Management Plans can vary in scope and complexity based on site and other project related dynamics, the SMP has not been specifically identified as a requirement in the first two Submittals referenced in this Section. An SMP should be included as part of Submittals 1 and 2 if its development has been started by those proposed submittal dates. The Owner's schedule must show a 90% complete (minimum) SMP being submitted to OHCS no later than 120 days prior to Finance Closing or Construction Start. The completed SMP must be incorporated into the Construction Drawing Set and must therefore be included by default as part of Submittals 4, 5, and 6.

Detailed sub-phasing of the Construction period of the project is not necessary as part of the Current Project Schedule submitted with Submittal-1 however more detailed Construction Phase scheduling will be required as part of Submittal-4.

### 1f) Construction Cost Report

See Section 3, Part 3.04 the PDM.

### 2) Priority PDD's Submitted Previously (At the time of Application for funding in response to a NOFA).

Some documents submitted to the Agency at the time of Application will be included in the RCL Priority Response Review. There is no need to resubmit the documents listed below if they are not applicable or if they were already submitted to the Agency at the time of Application:

#### 2a) Capital Needs Assessment (CNA)

Applies to projects with Acquisition and/or Rehabilitation work.  
See Section 3, Part 3.03 the PDM.

#### 2b) Wood Destroying Organism (WDO) Assessment

Applies to projects with rehabilitation work.  
See Section 3, Part 3.03 the PDM.

#### 2c) Selection and Commitment to a Prescribed Sustainable Design Path

See Section 6 the PDM.

### 3) Submittal Timing

**Completed documents listed in 2.07.01; 1), must be submitted to the agency within 45 days of the date of issuance of the RCL. Contact the Loan Officer assigned to the project if more time is needed to submit one or more of the required documents.**

## OHCS Project Development Process (PDP) **2**

### 4) Agency Response to Submittal-1

The Agency will promptly acknowledge receipt of the submittal. Information provided in the documents submitted may have a bearing on the scope of the project and may require additional assessment and documentation requirements. Agency staff will work closely with the Owner and their team to determine if and how the information provided in Submittal-1 may influence the project.

### 2.07.02 Submittal-2: 50% Complete Design

#### 1) Required Documents

##### a) **50% Complete Design Drawings & Specifications**

This is a progress review submittal. At a minimum, drawings should show the information that was shown in the drawings at the time of Submittal-1 with the following additional information: Building geometries fully developed, exterior finish materials identified, basic apartment unit plans provided with basic hypothetical furnishings shown, unit and common area square foot sizes indicated. All major site features with vehicle and pedestrian circulation paths should be shown. An outline specification should also be provided.

#### 2) Submittal Timing

**May be submitted any time prior to, or in conjunction with, but no later than the Notice of 60 Days to Finance Closing (See 2.07.03)**

#### 3) Agency Response to Submittal-2

The Agency will promptly acknowledge receipt of the submittal. The Agency may issue questions or comments to the Owner's Project Team regarding the information provided. The Owner is expected to work diligently with the Agency to resolve any issues or concerns that may be expressed by the Agency as a result of the Submittal-2 review.

### 2.07.03 Submittal-3: Notice of 60 Days to Finance Closing (and/or Construction Start)

A minimal but important submittal consisting only of a brief message issued via email from the Project Owner or the Owner's Representative to the OHCS Loan Officer and the OHCS Architect indicating that Finance Closing is projected to be approximately 60 days away (but no fewer than 60 days<sup>1</sup>) from the date the notice is received by the Agency. This notice serves to give the Agency time to schedule for and prepare adequate resources to complete review of Submittal-4 (See 2.07.04). Once this submittal is made to the Agency it can be amended to add additional time but it cannot be amended to shorten the timeframe.

#### Required Documents

##### a) **Email Notification to OHCS**

##### b) **Any Final Standards Variance Requests (If Applicable)**

Note: This is the last opportunity to submit Standards Variance Requests (See Section 5a; Parts 5a.10 and 5a.10.01)

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### 2.07.03 Footnotes:

1. Once the 60 Notice is issued by the Owner, it is critical that the owner keep the OHCS Loan Officer apprised of anticipated changes in the projected Finance Closing date. Once the 60 Day Notice is received by the Agency, preparations for the Submittal-4 review will commence. If Finance Closing occurs too long after the Agency has completed the Submittal-4 documents review, a re-review may be necessary which could delay Finance Closing and/or Construction Start and additional Agency review fees may be assessed.

### 2.07.04 Submittal-4: Substantially Complete (95%+) Construction Document Review

#### 1) Required Documents

##### a) **95+% Complete Drawings and Specifications**

Fully developed documents of sufficient detail and completeness to receive a Building Permit. Drawings should be complete with all drawing sheets present and should include exterior envelope material interface and penetration details.

##### b) **Completed OHCS Design Standards Checklist**

See Section 5a and 5b of this Manual.

##### c) **Current Draft of the Construction Contract (Should be fully prepared with the exception of signatures)**

Special Note for Projects with HOME Funding: The Contract must refer to the HOME Contract Provisions as being made a part of the Contract and they must be incorporated into the Contract as an exhibit. The HOME Contract Provisions can be obtained from the OHCS Loan Officer assigned to the project.

#### **Important**

Prior to signing any contract related to their project, the Project Owner must contact the OHCS Loan Officer assigned their project to confirm appropriate timing of executing (signing) the contract. Some funding programs such as HOME have strict timing requirements related to contracts that if not carefully followed can jeopardize funding eligibility.

##### d) **Current Construction Cost Report**

See Section 3, Part 3.04 the PDM.

##### e) **Current Update to the Project Schedule Showing Major Construction Tasks and Sequencing**

#### 2) Submittal Timing

**Submit the documents to OHCS at the same time an identical set is submitted as part of the Building Permit application made to the building permit issuing authority having jurisdiction but no later than 30 days prior to Finance Closing.**

## OHCS Project Development Process (PDP) **2**

### 3) Agency Response to Submittal-4

The Agency will promptly acknowledge receipt of the submittal. The Agency may issue questions or comments to the Owner's Project Team regarding the information provided. The Owner is expected to work diligently with the Agency to resolve any issues or concerns that may be expressed by the Agency as a result of the Submittal-4 review.

### **2.08 Construction Phase Project Development Documents (PDD) Submittals**

Three PDD submittals (5, 6 and 7) are required during the project's Construction Phase as given in 2.08.01 through 2.08.03 of this Section. As shown in the diagram in Part 2.12 of this section, the Construction Phase of the project begins at Finance Closing (or Construction Start) and concludes with the OHCS Architect approving the Agency's last PDD submittal; Submittal-7 which identifies that all Program and Agency based Design and Construction Requirements have been satisfactorily met by the Project Owner.

#### **2.08.01 Submittal-5: 100% Design / Construction Documents**

This Submittal serves to fully update the Agency on any design and/or PDD modifications that have occurred since Submittal-4.

#### 1) Required Documents

##### a) **100% Complete Construction Drawings**

Updated complete set of drawings including all design disciplines. Drawings should contain all changes made in response to building permit authority review, other funding source agency comments, OHCS comments, and all other changes/updates made since Submittal-4 as applicable.

##### b) **100% Complete Project Manual w/Technical Specifications**

##### c) **Copy of the Building Permit issued by the Permit Issuing Authority having Jurisdiction**

##### d) **Updated OHCS Design Standards Checklist (only if modified from Submittal-4)**

##### e) **Fully Executed Construction Contract**

##### f) **Updated Construction Cost Report (only if modified from Submittal-4)**

##### g) **Updated Construction Schedule (only if modified from Submittal-4)**

#### 2) Submittal Timing

**Submit the documents to OHCS after Finance Closing but no later than 10 business days following Finance Closing or Construction Start, whichever is the latter.**

### 3) Agency Response to Submittal-5

The Agency will promptly acknowledge receipt of the submittal. The Agency may issue questions or comments to the Owner's Project Team regarding the information provided. The Owner is

## 2 OHCS Project Development Process (PDP)

expected to work diligently with the Agency to resolve any issues or concerns that may be expressed by the Agency as a result of the Submittal-5 review.

### 2.08.02\_Submittal-6: Substantial Completion Documents

- 1) Required Documents
  - a) **Completed Certificate of Substantial Completion**
  - b) **Architect’s Punch-List**
  - c) **Sustainable Design Path Certification**
  - d) **Completed Form A-AS; Architect’s Certification 1 of 2, and all documents that may be required as attachments to Form A-AS. Form A-AS is located in Appendix C of this Manual.**
- 2) Submittal Timing

**Submit the documents to OHCS when the Architect deems the project to be “Substantially Complete”.**
- 3) Agency Response to Submittal-6

The Agency will promptly acknowledge receipt of the submittal. The Agency may issue questions or comments to the Owner’s Project Team regarding the information provided. The Owner is expected to work diligently with the Agency to resolve any issues or concerns that may be expressed by the Agency as a result of the Submittal-6 review.

### 2.08.03\_Submittal-7: Construction Closeout Documents

- 1) Required Documents
  - a) **Completed Form A-CR; Owner’s PDP Closeout Report and all supporting documents listed therein. Form A-CR is located in Appendix C of the PDM.**

**Important**

The Owner’s PDP Closeout Report requires the Project Owner to complete, collect from their Team, and submit to the Agency a number of important final construction related documents. The Owner is encouraged to carefully review Form A-CR early in the project to fully familiarize themselves with the requirements associated with completing Submittal-7.

- 2) Submittal Timing

**The satisfactory completion of this Submittal is essential for closing the project and for Agency release of all remaining project funds. Though the precise timing for submission of Submittal-7 is not critical to the Agency it is suggested that it be made as soon as reasonably**

## OHCS Project Development Process (PDP) **2**

**possible to avoid delays in final release of funds or other potential program related complications.**

### 3) Agency Response to Submittal-7

The Agency will promptly acknowledge receipt of the submittal. Once all of the Submittal-7 requirements have been completed to the Agency's satisfaction, the OHCS Architect will issue a Construction Closeout Certification to the OHCS Loan Officer in charge of the project. The issuance of the Construction Closeout Certification identifies that funding Program requirements and the Agency's Design and Construction requirements have been satisfied by the Project Owner's Team and that the Agency's Project Development Process is complete. Following issuance of the Construction Closeout Certification by the OHCS Architect, additional final steps administered by the OHCS Loan Officer assigned to the project will be needed to achieve Final Close-Out of the project and the release of any remaining Program funding.

### **2.09\_\_\_Project Owner Management of Required PDD Submittals**

Required Submittals are to be managed by the Owner's Team as described in parts 2.09.01 through 2.09.04 of this Section.

#### **2.09.01\_How to Transmit Submittals Required by this Section**

All submittals should ideally be made available to the Agency via granting Agency access to a web-based document management site (hub) managed by the Project Owner. This access must be set up early in the Design Phase. If needed, other options for document access or transmittal can be arranged with the OHCS Architect. In addition to electronic file copies, 'hard-copy' versions of some of the PDD's requested throughout the submittal process are required by the Agency. Hard-copy document requirements are defined in 2.09.03 and 2.09.04 of this section.

#### **2.09.02\_Notification to Agency that a Submittal has been Uploaded to Owner's Web-Based Document Hub**

When documents have been uploaded to the Owner's web based document hub, the OHCS Architect will need to be notified via email that the required Submittal is complete. The date of the email notification to the OHCS Architect establishes the official time of submission of the Submittal irrespective of the dates that the documents were uploaded to the hub.

#### **2.09.03\_Hard-Copy Document Submittal Requirements**

In addition to the electronic versions of all the PDD's required by Parts 2.07 and 2.08 of this Section, additional hard-copy versions of the documents listed below are required by the Agency. Hard-Copy document submittals must be received by the Agency within the timeframes established by each Submittal required by this Section.

##### **a) Submittal-5 Hard-Copy Documents**

Two (2) sets of the Construction Drawings (Drawings must be a **bound ½ size set** – also see Part 2.10 of this Section) and two (2) copies of the Project Manual transmitted as follows:

One (1) set of the Drawings and one (1) copy of the Project Manual transmitted to OHCS at the address given in 2.09.04.

## 2 OHCS Project Development Process (PDP)

And;

One (1) set of the Drawings and one (1) copy of the Project Manual transmitted directly to OHCS's CA Consultant<sup>1</sup> (if applicable) at the CA Consultant's address. If the Agency's CA Consultant and/or their address is not known, contact the OHCS Architect to obtain this information.

**b) Submittal-7 Hard-Copy Documents**

One (1) set of the Construction Drawings (Drawings must be a **bound ½ size set** – also see 2.10 of this section) and one (1) copy of the Project Manual transmitted to OHCS (only) at the address given in 2.09.04.

2.09.03 Footnotes:

- 1) CA Consultant refers to OHCS's Construction Administration Consultant. Most projects will have a CA Consultant engaged to assist the Agency with PDD reviews and with Construction Phase project site visits to observe the construction work and provide progress reporting to the Agency. Also see Section 7 (OHCS Construction Phase Engagement) of this Manual.

**2.09.04 Sending Hard-Copy PDD's to the Agency**

All hard-copy document transmittals should be addressed to the following address:

Oregon Housing and Community Services  
725 Summer St. NE, Suite B  
Salem OR. 97301-1266  
Attn:  
OHCS Architect  
Multifamily Housing Finance Section

**2.10 Legible ½ Size Drawing Sets**

The Agency suggests that care be taken in planning the drawing set conventions such that when the drawings are printed at ½ size the text and other important document information remain legible.

**2.11 Quality Controls & Compliance**

The Agency maintains the right to exercise project process and design quality related compliance controls per parts 2.11.01 and 2.11.02 of this Section.

**2.11.01 Agency Maintains the Right to Request Additional Submittals**

The agency may request additional document submittals depending on the particular circumstances of a given project and/or as the agency deems necessary or prudent to fulfill its fiduciary responsibility to project stakeholders.

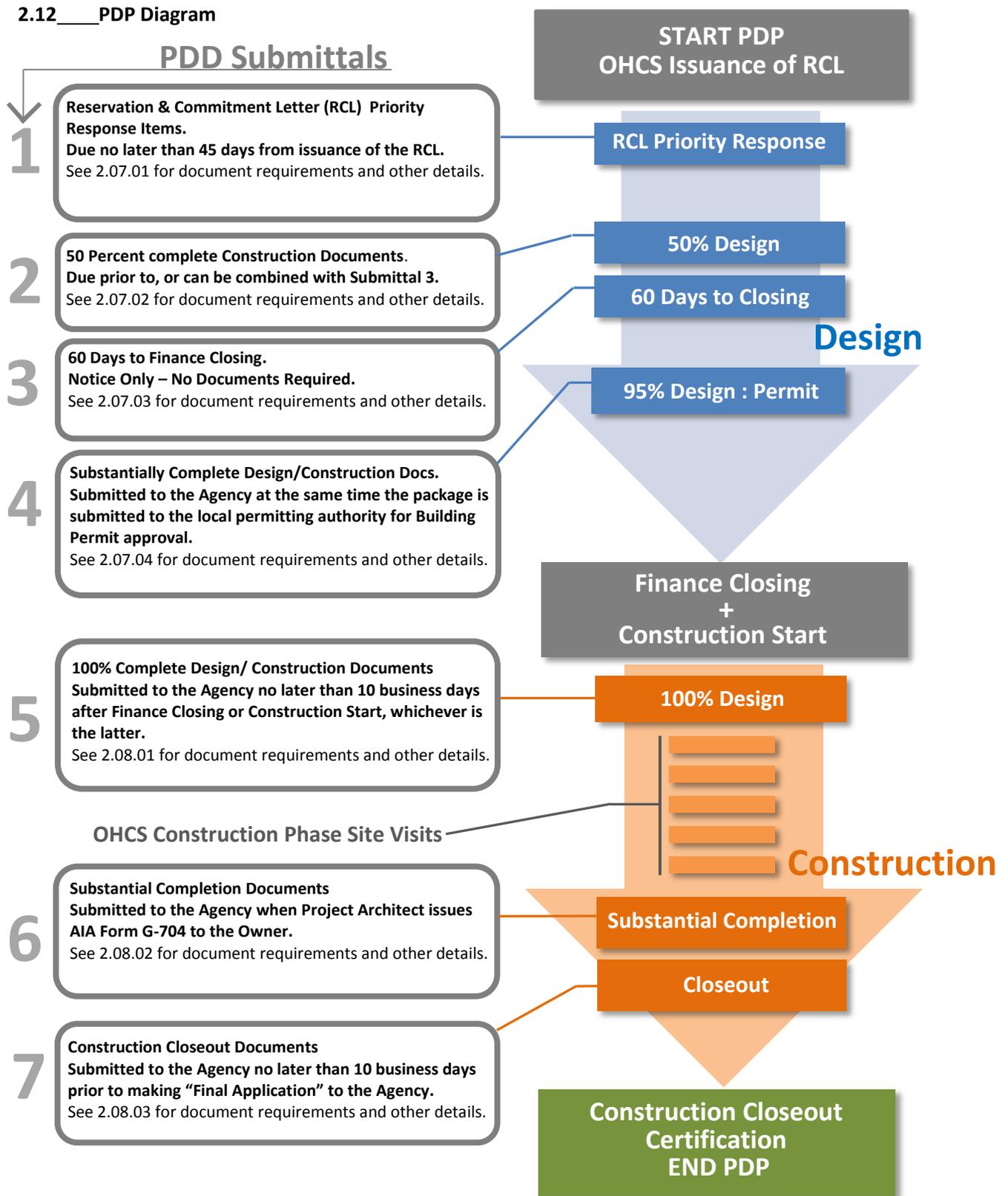
## OHCS Project Development Process (PDP) **2**

### **2.11.02\_\_Agency Maintains the Right to Require Adherence to Agency’s Design & Construction Standards and to Delay Finance Closing and/or Withhold Funding.**

The Agency maintains the right to enforce adherence to the Design and Construction Standards by placing a “hold” on the project schedule and/or on Agency controlled funding to the project if the Standards and Processes outlined in the PDM are not conscientiously engaged by the Owner’s Team. Maintaining close attention to the timing requirements, design requirements, and the document submittal requirements outlined in the PDM is important to avoiding project delays and/or impacts to project funding.

## 2 OHCS Project Development Process (PDP)

### 2.12 PDP Diagram



## Scoping & Existing Conditions Assessments **3**

### 3.01 Section Overview

Prior to, and during the early stages of design, a number of Existing Conditions Assessments and/or other informational type Assessments may be needed to determine the project's context, scope, and cost. This Section of the PDM lists the Assessments and Reports that are commonly requested by the Agency for the purpose of understanding the project's needs and intentions. Additionally, this Section describes the Agency's required minimum content and standard to be met when undertaking the Assessments listed.

### 3.02 Determining What Assessments are Needed for a Specific Project

There are two primary points in time during the project timeline at which the Agency requests Existing Conditions Assessments or Other Informational Reports as follows:

**a) At the time of Application in response to a NOFA.**

(See the applicable NOFA for any Assessments that are needed at the time of Application). Typically, there is only one Assessment requirement at the time of Application; a Capital Needs Assessment (CNA). A CNA is required at the time of Application only when the proposed project includes Acquisition and/or Rehabilitation work to an existing building or buildings.

**b) At the time of Receiving the Reservation and Conditions Letter (RCL) from the Agency.**

The RCL will contain all of the required Assessments known to the Agency at the time the RCL is issued to the Project Owner. It is important to note that on occasion an initial Assessment may lead to the need for additional follow-on Assessments that will not be known to the Agency at the time the RCL is issued to the Project Owner. One example of such a circumstance is when a Phase I Environmental Assessment leads to the need for a Phase II or Phase III Environmental Assessment.

### 3.03 Typical Assessment Types, Descriptions, and OHCS Content Requirements

Parts 3.03.01 through 3.03.07 list a few of the most common Assessments that may be required by a funding Program to determine project requirements and scope and any Agency content requirements or standard to be followed.

#### 3.03.01 Capital Needs Assessment (CNA)

A CNA is required on projects involving Acquisition and/or Rehabilitation work to an existing building(s) and is required at the time of Application for funding from the Agency. Agency CNA standards, provider qualifications, and scope requirements are as follows:

- 1) Required Provider Qualifications: The CNA must have been prepared by an Oregon Licensed Architect or Professional Engineer or other qualified party as deemed acceptable by the Agency and they must have a minimum of 3 years of previous experience in Capital/Physical Needs Assessment which includes work with projects of similar or greater size and complexity as the subject project. Specialized sub-consultants may be used to provide expertise on specific elements of the Assessment; all such contributor's shall have previous experience on similar projects and their names, firm names, and professional credentials shall be clearly identifiable in the Assessment Report. The individuals providing CNA services, and their firms, shall not have an

### 3 Scoping & Existing Conditions Assessments

identity of interest with the Project Owner, the Owner's property, or any management entity for the property. If any pending litigation or claims exist against any of the involved firms or individuals related to their professional service (either as the primary consultant or as sub-consultant), these must be disclosed to the Project Owner and to OHCS prior to engagement of services.

- 2) The CNA must have been prepared no more than 12 months prior to submission of the Assessment Report to the Agency.
- 3) The CNA shall be comprehensive, including but not necessarily limited to; building envelope, structural system, foundation, electrical/plumbing/HVAC systems, interior finishes and elements, elevators, egress components, fire protection systems, other elements and systems as applicable.
- 4) 100 percent of the building(s) (including all interior and exterior spaces) to be acquired and/or rehabilitated shall be inspected and included in the Assessment Report. If for some unforeseen reason some limited areas of the building(s) cannot be inspected at the time of the scheduled inspection, the CNA must include an explanation for why the areas were not investigated and a rationale for any assumptions that may be made in the CNA Report regarding the uninspected areas. The Agency may at its sole discretion require that the uninspected areas be inspected prior to accepting the CNA as being complete.
- 5) The CNA must identify all observed conditions which can be considered an imminent threat to occupant health and safety. If serious health and safety issues are identified in occupied buildings, the Agency may require that all such issues be temporarily or permanently addressed to the Agency's satisfaction prior to offering any conditional award of Program funding.
- 6) If the building(s) were constructed prior to 1992, the CNA must include an Energy Audit performed by a qualified Energy Consultant.
- 7) The CNA and the Assessment Report must include investigation and reporting on Wood Destroying Organism damage and/or activity by a qualified individual as defined in part 3.03.03 of this Section of the PDM.
- 8) The CNA must identify, in an A to F rating system, any deferred maintenance, any areas or elements of non-conformance with HUD's Uniform Physical Conditions Standard (UPCS), and any other identified physical needs.
- 9) The CNA must identify all physical needs requiring attention within a 24 month period from the date of the CNA Report (Two Year Physical Needs). The Project Owner must, at a minimum, include these items in the proposed project scope and in the development budget for the proposed project.

## Scoping & Existing Conditions Assessments **3**

- 10) The CNA must identify any needed architecture/engineering design including any additional market based improvements needed to restore the property to a reasonable standard of livability appropriate for its location and intended purpose.
- 11) The CNA must identify any repairs and/or significant replacement needs projected beyond the first two (2) years of service after completion of the Rehabilitation and that will be required to maintain the Project's physical integrity over the next thirty (30) year period. The Project Owner must include these items in their Replacement Reserves budget for the project.
- 12) The CNA must be the basis from which the scope of work for the project has been developed and the basis on which any capitalized or annual contributions to the replacement reserves are based. At a minimum, the scope of work should include replacement or repair of any items scored D or F, any Critical Repair Items, and any other items deemed to be within the Two (2)-Year Physical Needs category.

### **3.03.02** Phase I Environmental Assessment

*Reserved (Contact the OHCS Loan Officer or OHCS Architect for direction on the Standard to be met)*

### **3.03.03** Wood Destroying Organism (WDO) Assessment

In most cases, WDO Assessment is associated with Capital Needs Assessment on projects that involve Rehabilitation and/or Acquisition (see Part 3.03.01 of this Section of the PDM for Capital Needs Assessment).

- 1) Required Provider Qualifications: Firms and individuals that perform Wood Destroying Organism (WDO) inspections must be registered as a Contractor with the Oregon Construction Contractors Board. Additionally, the inspector's firm must be licensed by the Oregon Department of Agriculture as a Commercial Pesticide Operator in the category of Structural Pest Control and the individual inspector performing the inspection must be licensed as Commercial Pesticide Applicator in the category of Structural Pest Control. Additionally, both the firm and the individual performing the inspection must have a minimum of 3 years of previous experience in WDO Assessment which includes work with projects of similar or greater size and complexity as the subject project.

### **3.03.04** Biological Assessment

*Reserved (Contact the OHCS Loan Officer or OHCS Architect for direction on the Standard to be met)*

### **3.03.05** Radon Assessment

*Reserved (Contact the OHCS Loan Officer or OHCS Architect for direction on the Standard to be met)*

### **3.03.06** Hazardous Substance Assessment

*Reserved (Contact the OHCS Loan Officer or OHCS Architect for direction on the Standard to be met)*

### **3.03.07** Energy Audit

*Reserved (Contact the OHCS Loan Officer or OHCS Architect for direction on the Standard to be met)*

## 3 Scoping & Existing Conditions Assessments

### 3.04 \_\_\_\_\_ Construction Cost Report

*Reserved (Contact the OHCS Loan Officer or OHCS Architect for direction on the Standard to be met)*

# Baseline Design Requirements **4**

## 4.01 \_\_\_ Section Overview

For the purpose of this Manual, Baseline Design Requirements refer to those Design Requirements that are mandated by laws and regulatory, funding, or project stakeholder entities other than OHCS and are, by extension, required by OHCS to be fully complied with. It should be noted that some of the federal regulations that are cited under 4.02.03 of this Section apply only to projects subsidized with federal funding.

In addition to the Baseline Design Requirements defined in this Section, OHCS has established a set of Agency based “best practice” Design Standards which constitute an “overlay” to the Baseline Requirements. The Agency based Design Standards are defined in Sections 5a and 5b of this Manual.

## 4.02 \_\_\_ Baseline Design Requirements

The most common and broadly applicable Baseline Design Requirements are outlined in parts 4.02.01 through 4.02.06 of this Section. The list is not intended to be comprehensive nor can it be specific to each project. The Project Owner and their Architect shall be responsible for identifying all of the Baseline Design Requirements that are applicable to their specific project and for the integration of those requirements into the project design.

### 4.02.01\_State of Oregon Construction Codes

As adopted and administered by Oregon Consumer & Business Services, Building Codes Division (BCD) and as applicable to each project.

### 4.02.02\_Local Building/Development Codes, Planning/Zoning Codes, and Other Local Development Related Ordinances and Regulations

Based on the project site’s location and the regulatory bodies having jurisdiction thereof and as applicable to each project.

### 4.02.03\_Federal Regulations and Standards Related to Housing and Accessibility

- a) Section 504 of the Rehabilitation Act of 1973; Implemented by 24 CFR<sup>1</sup> part 8. As applicable.  
Ref: (Section 504 of the Rehabilitation Act bars recipients of federal funds from discriminating on the basis of disability. Specifically, Section 504, which is enforced by HUD, prohibits recipients of federal funds from discriminating based on disability. For recipients of funding from HUD, this includes the requirement that in new construction and substantial alterations at least 5% of the housing units are accessible to people with mobility impairments and at least 2% of the housing units are accessible to people with vision or hearing impairments. In addition, Section 504 requires recipients to make reasonable accommodations, including structural changes, so that people with disabilities can use and enjoy housing. Section 504 covers all of the programs and activities of a recipient of federal financial assistance, and has additional requirements beyond those described here.)<sup>2</sup>
- b) Titles II and III of the Americans with Disabilities Act (ADA); Implemented by 28 CFR<sup>1</sup> parts 35 and 36. As applicable.  
Ref: (The Americans with Disabilities Act, Titles II and III, may apply to housing. Title II applies to the activities of state and local governments, including housing. Title III applies to places of public accommodation, such as rental and sales offices.)<sup>2</sup>

## 4 Baseline Design Requirements

- c) Fair Housing Act as Amended (as applicable to **Covered Multifamily Housing Projects** as defined in 24 CFR 100.201). Implemented by 24 CFR 100.205.  
Ref: (Prohibits discriminatory housing practices based on disability and family status. The Fair Housing Act also prohibits discrimination in the sale, rental, and financing of dwellings based on race, color, religion, sex and national origin. The Fair Housing Act establishes seven design and construction requirements for all covered multifamily dwellings consisting of four or more units designed and constructed for first occupancy on or after March 13, 1991.) (The sections of the regulations that address design and construction issues are 24 Code of Federal Regulations (CFR) 100.205 and some definitions are found in Section 24 CFR 100.201. Other portions of the regulations that deal with disability issues are in 24 CFR 100.201-.203.)<sup>2</sup>
- d) Uniform Federal Accessibility Standards (UFAS).  
Ref: (Architectural Barriers Act of 1968; The Architectural Barriers Act is a general accessibility law that requires buildings owned, leased, or operated by the federal government, and those financed by a grant or loan from the federal government, to be accessible. The accessibility standards used under the Architectural Barriers Act is UFAS.)<sup>2</sup>

### **Important**

Though the UFAS and Chapter 11 of the OSSC<sup>3</sup> contain many overlapping and/or identical Accessibility related provisions there are some critical differences in the two documents. The Project Owner's Architect is expected to be familiar with the two documents and their differences and ensure that the project design fully addresses all relevant Accessibility requirements.

### 4.02.03 Footnotes:

- 1) CFR : Code of Federal Regulations
- 2) Information referenced verbatim from Fair Housing Accessibility First web site:  
<http://www.fairhousingfirst.org/resources/laws.html>
- 3) OSSC : Oregon Structural Specialty Code

### **4.02.04\_Visitability**

Refer to ORS 456.510 for applicability and exemptions. If exempt, the Project Architect must submit form A-VR which can be found in Appendix-C of this Manual.

### **4.02.05\_OHCS Funding Program Specific Requirements**

In addition to the Building Code and Accessibility related requirements identified in parts 4.02.01 through 4.02.04 of this Section, funding programs administered by the Agency often require that the project undergo specialized reviews and/or address a number of site and building specific design considerations. **All such funding program based requirements are identified in the Design & Construction section of the project's Reservation and Conditions Letter (RCL) issued by OHCS to the Project Owner at the start of the project.** The Project Architect should receive a copy of the Design & Construction section of the RCL from the Owner as soon as the owner receives the RCL from OHCS so that they have a high-level overview of any Program specific design and construction related

## Baseline Design Requirements **4**

requirements that may impact the project's design and/or the construction contract. A few examples of Funding Program related requirements may include but are not necessarily limited to:

- a) National Environmental Policy Act (NEPA) Environmental Review  
When a NEPA Environmental Review is shown to be required in the project's RCL, OHCS will coordinate the review process with the appropriate governmental agencies and notify the project Owner of any requirements that may be identified and when the review process is complete. This review is typically performed in parallel with the project design work being performed by the Owners Development Team. Results of the NEPA review may require that the project design be adapted to address newly identified conditions.
- b) Biological Evaluation as required by the Endangered Species Act  
The Biological Assessment is part of the NEPA Environmental Review. When shown to be a requirement in the project's RCL, the Owner's Team is required to initiate a Biological Evaluation of the project site to determine if there are any federally listed species or designated critical habitats on the project site. The results of the evaluation will determine the scope of any mitigating site design measures that may be needed.
- c) Oregon Department of State Lands (DSL) Review for Presence of Regulated Wetlands  
When review for presence of Regulated Wetlands is shown to be required in the project's RCL, OHCS will coordinate the review process with the DSL and notify the project Owner of any requirements that may be identified and when the review process is complete.

### **4.02.06 Project Design Requirements applied by Other Project Stakeholders**

Other Project Partners and/or Stakeholders may have project design requirements in addition to those identified in this section of the PDM. It is the responsibility of the Owner's Development Team to identify and satisfy all project design requirements expected from all project Stakeholders. Examples of other potential Project/Funding stakeholders may include but are not necessarily limited to:

- USDA Rural Development Requirements
- LIHTC Limited Partner Requirements

### **4.03 Potential Conflicts Between Baseline Design Requirements**

It is the responsibility of the Owner and their Development Team to resolve any conflict that may be identified within or between the Baseline Design Requirements to the satisfaction of the entities that administer or enforce the requirements that are conflicting.

### **4.04 OHCS Design Requirement Overlays**

In addition to the Baseline Design Requirements referenced in this section, also see:

- a) Section 5a & 5b ; OHCS Design Standards Overlay / OHCS Design Standards Checklist
- b) Section 6; Sustainable Design Path Overlay.

# 4 Baseline Design Requirements

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# OHCS Design Standards Overlay **5a**

## **5a.01\_\_Section Overview**

OHCS has developed a list of design principles and elements that are not necessarily addressed by the Baseline Design Requirements given in Section 4 of the PDM but are nevertheless currently deemed by OHCS to be “best practice” and/or “common sense” design goals for all housing projects supported by funding provided by the Agency. This list is referred to in this document as the OHCS Design Standards Checklist or simply the “Standards Checklist” (see Section 5b of this Manual). The items listed in the Standards Checklist constitute project requirements that are additional to those given in Section 4 of the PDM and as such are considered an “overlay” to requirements identified in that section. Additionally, the Agency requires that Sustainable Design measures are integrated into the project per Section 6 of this Manual.

## **5a.02\_\_Applicability of this Section**

Unless exempted from all or portions of the requirements defined in Sections 5a and 5b of the Project Development Manual per part 5a.03 below, the Owner’s Project Development Team must incorporate the design elements and principles listed in the Standards Checklist (Section 5b) into the project design.

## **5a.03\_\_Exemption from Requirements of this Section**

Refer to the Preface at the beginning of this Manual (Section i).

## **5a.04\_\_Precedence of Section 4 Over Section 5b.**

By default, Federal, State, and Local Codes and Regulations shall take precedence over OHCS based Design and Construction Standards if they are determined to be in direct and irreconcilable conflict. If a potential conflict is one of a matter of degree to which a particular condition is to be met then the higher Standard or the more stringent Requirement shall take precedence as long as each Standard or Requirement remains satisfied. The Project Architect shall notify the OHCS Architect in writing if or when such conflicts are identified.

## **5a.05\_\_Intent and Use of the Design Standards Checklist**

The intent of the Standards Checklist is for the Owner’s Project Team to use it as a tool to insure that all of the Agency’s Design Standards have been addressed in the project Drawings and Specifications. The Project Architect is encouraged to refer to the Standards Checklist at regular intervals during the design process and to periodically update the Checklist in conjunction with the development of the Construction Documents. See part 5a.08 of this Section for more detailed instructions on completing the Standards Checklist.

## **5a.06\_\_Submission of the Completed Design Standards Checklist to OHCS**

The Project Architect must sign and submit the completed Standards Checklist with Submittal-4. (See part 2.07.04 of this Manual regarding information on Submittal-4). (See part 5a.08 of this Section for instructions on completing the Standards Checklist).

## **5a.07\_\_Design Standard Classification or “Class”**

Section 5b of the PDM contains “Design Guidelines”, “Design Requirements” and “Design Quality Upgrades”. For the purposes of Sections 5a and 5b these three terms shall be defined as follows:

## 5a OHCS Design Standards Overlay

### Design Guideline “G”

Design principles or elements defined as a “Guideline” are deemed by the agency to be default best practice approaches. The agency understands that design is a complex process and that certain default Guidelines may not always be compatible with the best overall design opportunity given the unique set of project characteristics that may exist. Though Guidelines are to be regarded first as “Requirements”, the agency allows flexibility for the Project Team to adapt Guidelines as they deem prudent to better meet higher level design goals for the project. It should be stressed that the agency allows for this flexibility as long as it is clear from the alternate approach taken that deviation from a specific Guideline better allows the overall design to meet the Agency’s Priorities & Goals for Housing (see Part 1.02 in Section 1 of this Manual). The Owner’s Project Team is responsible for confirming that deviation from an OHCS Design Guideline will not jeopardize the project’s conformity with requirements that may be established by project stakeholders other than OHCS. Design Guidelines are indicated with a letter “G” in the “Class” column of the Checklist in section 5b of the PDM.

### Design Requirement “R”

Design principles and elements defined as a “Requirement” are just that; they are **required** and must be integrated into the project design. Design Requirements are indicated with a letter “R” in the “Class” column of the Checklist in Section 5b of the PDM. See 5a.10 regarding Variance Requests related to the OHCS Design Standards.

### Design Quality Upgrade “QU”

Design principles and elements defined as “Design Quality Upgrades” or more simply “Quality Upgrades” are suggested design related upgrades from the default minimum Standard. These elements are Elective or Optional and are indicated with a “QU” in the “Class” column of the Checklist in Section 5b of the PDM.

### **5a.08\_\_ Instructions for Completing the Design Standards Checklist**

Instructions for completing the Standards Checklist are defined in parts 5a.08.01 through 5a.08.03 of this Section.

#### **5a.08.01\_ Checking-Off the Design Standards**

A checkmark should be placed in the box next to each item listed in the Standards Checklist (as applicable) as it is addressed within the Construction Document development process. All items classified as a Guideline or a Requirement in the Standards Checklist must be addressed in the drawings and/or the Specifications.

#### **Important**

If for some reason a Design Standard listed in the Standards Checklist cannot be addressed as expected or if the project design proposes a substantial deviation from the Standard, the checklist box must be left empty and a request for a Variance from the subject Standard or item must be submitted to the Agency. See Part 5a.10 of this Section of the PDM for more information on submitting Design Standards Variance Requests and important timing considerations.

## OHCS Design Standards Overlay **5a**

### **5a.08.02\_Referencing Where the Standard is Addressed in the Construction Documents**

As an aid to Agency personnel who will be reviewing the completed Standards Checklist, the project Architect is requested to identify in the **CD Ref.** column of the Checklist where the Standard has been addressed within the Construction Documents. A very general reference to the location is sufficient, for example, “Site Plan Note # xx”, “Upper left corner of sheet xx”, “Page xx of the Project Manual”, etc. The Architect is not required to provide a referenced location for every item but may use their discretion in providing this information where they feel it would be helpful to the OHCS document reviewer.

### **5a.08.03\_Signing and Submitting the Standards Checklist**

The completed Standards Checklist must be signed by the Project Architect and submitted per 5a.06 of this Section.

### **5a.08.04\_OHCS Guidance References**

In some cases there may be an Agency provided guidance related reference source indicated in the **OHCS Guidance Ref.** column of the checklist. Information provided in this column will refer the user of the Standards Checklist to additional information related to the associated item. This column of the checklist is for Agency use.

### **5a.09\_\_\_\_\_Agency Maintains Right to Keep “Guideline” as “Requirement”.**

Should the Owner’s Project Team decide to deviate substantially from a Design Guideline listed in Section 5b, and the Agency and the Owner’s Project Team disagree on whether that deviation better meets the agency’s overarching project goals, the agency’s position on this issue shall prevail and the project design will, to the agency’s satisfaction, be made to substantially address the subject Guideline in the Construction Documents.

### **5a.10\_\_\_\_\_Variance Request: OHCS Design & Construction Standards**

Where the Project Owner’s Team feels that the project is improved by deviating from an OHCS Design Standard or if the Standard cannot be met, the Owner’s Team may submit a Variance Request using form **A-VR** provided in Appendix-C of this Manual. The Variance Request requires a justification and, if applicable, a description of how the proposed alternate approach is equal to, or is an improvement to the OHCS Design Standard.

#### **5a.10.01\_Timing of Variance Requests**

Variance Requests should be made as early as possible in the Design Phase so that adequate time is available for review, and, if applicable, for adjusting the project design based on the Agency’s decision. Variance Requests can be submitted any time prior to, or in conjunction with submission of Submittal-3 (See 2.07.03 for description of Submittal-3). Variance Requests submitted after Submittal-3 will be reviewed at the discretion of the Agency and may be declined without review.

#### **5a.10.02\_Variance Requests related to “Guidelines” (Items classified with a letter “G” in the Standards Checklist (Section 5b) are left to Project Architect’s Discretion**

Because Design Guidelines (not to be confused with Design Requirements) are typically more general in nature, the Agency does not require a Variance Request when the project design deviates from a Guideline. However, when a substantive deviation from a Guideline is proposed by the Owner’s Team a Variance Request is still requested as a courtesy to the Agency. The Agency allows the Project Architect

## 5a OHCS Design Standards Overlay

to use their own discretion in determining what constitutes a “substantive deviation from a Guideline” and where a Variance Request will be issued to the Agency. In contrast, any proposed deviation from Design Requirements necessitates issuance of a Variance Request to the Agency.

### **5a.10.03\_Agency’s Response to Variance Requests**

The Agency will promptly review and respond to Variance Requests received within the timeframes established by Part 5a.10.01 of this Section. Variance Requests will be evaluated based on the Agency’s assessment of the overall impact and merits of the proposal being made. The Agency, at its sole discretion, will approve, conditionally approve, or reject each Variance Request it deems to be reasonable. The Agency reserves the right to decline review of Variance Requests it deems to be unreasonable or that addresses design requirements over which it does not have sole authority.

# OHCS Design Standards Checklist 5b

Refer to Section 5a of this Manual for instructions on the use of this form.

Project Name

## 5b.01\_Housing Design

No.	G : R	√	CD Ref.	Item	OHCS Guidance Ref.
01.01	G	<input type="checkbox"/>		The Agency considers contemporary architectural design approaches and principles to be in alignment with the fundamental goals of Affordable Housing Development: Building form and composition are borne out of an honest expression of function, purpose, and time, a sensitive response to site and environment, a conscientious use of resources, and an efficient and intuitive application of the contemporary “design” vernacular. To the extent possible, “affordable housing” design preconceptions have been challenged, unnecessary complexity reduced to elemental solutions, design clichés, and arbitrary architectural adornment have been avoided.	

## 5b.02\_Accessibility

No.	G : R	√	CD Ref.	Item	OHCS Guidance Ref.
02.01	R	<input type="checkbox"/>		The required number and types of accessible dwelling units with the applicable Accessibility related characteristics have been incorporated into the project design as governed by <u>Section 504 of the Rehabilitation Act of 1973, The Fair Housing Act, As Amended and Chapter 11 of the OSSC.</u>	
02.02	R	<input type="checkbox"/>		In addition to item 02.01 above and any local jurisdiction Accessibility requirements that may apply, the project has been designed using the <u>Uniform Federal Accessibility Standards (UFAS).</u>  <b>Important:</b> <b><i>DO NOT</i></b> check the box associated with item number 02.02 if this project is not subsidized with federal funding and the UFAS is therefore not applicable to this project. If it is believed that this project is exempt from this requirement, leave the checkmark associated with this item blank, go to item number 02.03 under this Section of the checklist and place a checkmark in the box associated with that item.	
02.03	R	<input type="checkbox"/>		The project is EXEMPT from compliance with the UFAS.  <b>Important:</b> <b><i>Leave the box associated with this item unchecked if item 02.02 has been checked.</i></b>	

Check Only One Box

V : 2 0 1 6 . 0 6 . 0 1

## 5b OHCS Design Standards Checklist

Refer to Section 5a of this Manual for instructions on the use of this form.

02.04	R	<input type="checkbox"/>		All common area and dwelling unit related signage and unit identification incorporates Braille and is indicated to be mounted to meet applicable Accessibility Standards.	
02.05	R	<input type="checkbox"/>		On fully accessible units (Type A) spring hinges have been specified on exterior doors.	

### 5b.03 Stormwater Management

No.	G : R	√	CD Ref.	Item	OHCS Guidance Ref.
03.01	R	<input type="checkbox"/>		A Stormwater Management Site Plan has been included as part of the Construction Drawing set.	
03.02	G	<input type="checkbox"/>		To the greatest extent practical, the stormwater management strategy for the project manages all stormwater on the project site and avoids discharge to the municipal stormwater system.	

### 5b.04 Site : General

No.	Class	√	CD Ref.	Item	OHCS Guidance Ref.
04.01	G	<input type="checkbox"/>		As much as possible site design elements, especially building placement and massing, have been used to create and support outdoor common areas.	
04.02	G	<input type="checkbox"/>		As much as possible, buildings are oriented so that unit front entries are visible from the street and/or the parking area used by visitors and emergency vehicles.	
04.03	G	<input type="checkbox"/>		Walkway locations are planned so that they do not pass through other residents' outdoor space or within ten (10) feet of ground floor dwelling unit windows.	
04.04	R	<input type="checkbox"/>		All paved areas are designed to slope so that water does not accumulate on the surface. Cross-slopes at accessible paved areas including accessible parking spaces and loading zones, do not exceed 2%.	
04.05	QU	<input type="checkbox"/>		50% or greater permeability paving materials have been used in newly paved areas and where old paving has been replaced with new paving.	
04.06	G	<input type="checkbox"/>		The site design keeps the use of site steps and stairs to a minimum. Topography has been used to the greatest extent practical to gain level entry at different areas of the site and at building entrances.	
04.07	R	<input type="checkbox"/>		Accessible walkways adjacent to vehicle parking areas are designed and specified in the CD's to allow for a 2 foot vehicle overhang and still maintain a 4 foot clear path of travel. Wheel stops to prevent vehicles from encroaching into walkways is one acceptable method, among others.	

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# OHCS Design Standards Checklist 5b

Refer to Section 5a of this Manual for instructions on the use of this form.

04.08	R	<input type="checkbox"/>	All site amenities and resident support areas i.e. common space, refuse collection areas, etc. are connected via an accessible route.
04.09	R	<input type="checkbox"/>	Refuse collection stations are designed and specified in the CD's as being screened with permanent enclosures.
04.10	R	<input type="checkbox"/>	Refuse collection areas are conscientiously located to balance convenience for residents with adequate separation for minimizing sound and odor impacts and for allowing adequate access for the refuse hauler.
04.11	R	<input type="checkbox"/>	Refuse collection areas are designed and specified in the CD's to be located on a paved surface that is sloped to drain to an approved storm water management area or system. Pavement does not slope in excess of 2%.
04.12	R	<input type="checkbox"/>	Refuse collection enclosure gates or doors are protected by pipe bollards.
04.13	R	<input type="checkbox"/>	Refuse collection areas are connected to a water supply and a hose bib has been specified at the collection area.
04.14	R	<input type="checkbox"/>	Site lighting is provided to enhance the safety and security of residents and physical property. As much as possible, lighting is conscientiously designed to avoid unwanted impacts on unit interiors.
04.15	G	<input type="checkbox"/>	As much as possible, privacy screening is deployed between private outdoor areas.
04.16	G	<input type="checkbox"/>	As much as possible, fencing or vegetative screening is used to buffer or soften the transitions between incongruent uses on adjacent sites, between common and private use areas and to mitigate the visual impacts of vehicles and parking areas.
04.17	G	<input type="checkbox"/>	Unit entryways are designed such that residents are not required to pass over or through the entryway of another resident to gain entry to their own unit.
04.18	R	<input type="checkbox"/>	Visual privacy between units and from unit interiors and common exterior walkways and spaces is supported to the greatest extent possible.
04.19	R	<input type="checkbox"/>	The landscape design is in keeping with the project site's native biome and is designed such that irrigation and maintenance are minimized to the greatest extent practical.
04.20	R	<input type="checkbox"/>	Plant materials are kept clear of the building envelope. Plant species located near the building(s) have been placed and specified to have little to zero negative impact on the building envelope as the plants mature.
04.21	R	<input type="checkbox"/>	All disturbed areas of the site are shown in the plans to receive some form of landscape stabilization – no areas of the site/landscape plan are left undefined.
04.22	R	<input type="checkbox"/>	A minimum of 50% of all new vegetation is specified to be "native" with respect to the project site's region or locality. No species considered to be invasive have been specified.

# 5b OHCS Design Standards Checklist

Refer to Section 5a of this Manual for instructions on the use of this form.

## 5b.05 Exterior Elements

No.	G : R	√	CD Ref.	Item	OHCS Guidance Ref.
05.01	R	<input type="checkbox"/>		Essential Use Exterior Building Elements and Appendages such as stairways, landings, elevated walkways, etc., that are exposed to rain and/or direct sun are designed to be highly durable low maintenance building elements. Structural members are designed with dimensionally stable sized pressure treated wood members, hot dipped galvanized (HDG) steel, aluminum, concrete or similar highly decay and corrosion resistant materials. Railings and guards are shown to be HDG steel, aluminum, or similar material. Decking materials are shown to be durable, highly decay and corrosion resistant, highly stable materials such as market proven wood/plastic composites, concrete, sustainably harvested tropical hardwoods, etc.	
05.02	R	<input type="checkbox"/>		Non-Essential use Building Elements and Appendages such as decks and balconies that are not necessary for providing access to upper level living units <u>have not</u> been included as part of the project design, or if they have been included, they have been designed for durably per 5b.05.01. <b>(Note: OHCS may not approve decks or balconies that are exposed to weather if they are considered by the Agency to be a high cost maintenance risk and /or an undue safety risk to the project).</b>	
05.03	R	<input type="checkbox"/>		Decorative exterior Building Elements either attached or unattached to the primary structure(s) such as trellises, pergolas, gazebos, platforms and other non-essential accents that are exposed to weather (if present) have been designed for long term durably and maintenance free service similar to that described in 5b.05.01.	
05.04	R	<input type="checkbox"/>		The Architect’s drawings demonstrate that stairs, ramps, decks, balconies, elevated walkways and similar structures, all associated railings and guards, all associated structural connections and all associated attachments to the primary building structure(s) have been carefully detailed to defeat the damaging effects of moisture on these elements and on the primary building envelope components.	
05.05	R	<input type="checkbox"/>		As much as possible Mechanical Equipment is screened from view in an aesthetically pleasing and/or inconspicuous manner.	

## 5b.06 Building Envelope

No.	G : R	√	CD Ref.	Item	OHCS Guidance Ref.
06.01	G	<input type="checkbox"/>		<b>Roof Geometry:</b> Simple, unobstructed planes are maintained to the greatest degree possible. Arbitrary accents such as false dormers are minimized or avoided. Roof pitches maintain a	

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# OHCS Design Standards Checklist 5b

Refer to Section 5a of this Manual for instructions on the use of this form.

				minimum 6:12 slope unless higher level design priorities dictate otherwise.
06.02	R	<input type="checkbox"/>		<b>Roof Covering:</b> A durable low maintenance material with a 40 year or greater warranty has been specified
06.03	R	<input type="checkbox"/>		<b>Roof Overhangs/ Eaves:</b> Have been designed as applicable and practical to protect the building envelope from exposure to sun and rain.
06.04	R	<input type="checkbox"/>		<b>Roof Drainage:</b> Downspouts are shown/specified to be piped away from the building perimeter to an approved stormwater pretreatment/retention area or other approved stormwater management system.
06.05	G	<input type="checkbox"/>		<b>Roof/Attic Venting:</b> Has been designed to exceed code minimums where possible and where practical.
06.06	R	<input type="checkbox"/>		<b>Exterior Walls / Rainscreen:</b> One of the following approaches has been taken in the design: A full Rain Screen is employed as part of the envelope design where annual average rainfall exceeds 20 inches. Where annual rainfall is less than 20 inches a Rain Screen is still preferred however a Weather Barrier having a 90% drainage efficiency per ASTM E 2273 is permissible as an alternate.
06.07	R	<input type="checkbox"/>		<b>Exterior Wall Cladding:</b> The design employs a proven, highly durable, low maintenance cladding system.
06.08	R	<input type="checkbox"/>		<b>Exterior Cladding Design:</b> The design demonstrates an emphasis on durability and low maintenance. Building geometries have been kept simple, unnecessary surface complexities are avoided, material interfaces have been designed such that the dependence of the system on caulking and sealants is minimized.
06.09	R	<input type="checkbox"/>		<b>Cement Stucco and Synthetic Stucco (EIFS):</b> These cladding systems <u>have not</u> been employed in the design. These systems are not currently approved by OHCS.
06.10	R	<input type="checkbox"/>		<b>Envelope Response to Building Orientation:</b> To the maximum degree possible, the Architect has considered and accounted for the effects of sun (south and west orientations) and prevailing storm driven rain exposure on the building skin; its geometry, material, and detailing.
				<b>Exterior Doors and Windows:</b> These elements have been specified based on proven performance and durability.
06.11	R	<input type="checkbox"/>		<b>Exterior Door and Window Installation:</b> Detailed installation guidance has been provided in the Construction Documents that clearly specifies the installation procedures for these elements and their integration with related exterior envelope components.
06.12	R	<input type="checkbox"/>		<b>Other Exterior Envelope Penetrations:</b> The construction documents provide specific guidance to the contractor for each type of penetration showing how the weather barrier, flashing, and cladding system maintain a weather tight interface at the penetration. Details are developed such that the need for caulks and sealants are minimized or unneeded.
06.13	R	<input type="checkbox"/>		<b>Trim and Other Accents:</b> Have been efficiently utilized and

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# 5b OHCS Design Standards Checklist

Refer to Section 5a of this Manual for instructions on the use of this form.

				tightly integrated in to the envelope design such that caulks and sealants can be kept to a minimum. Durable, stable, decay resistant materials have been specified.	
06.14	R	<input type="checkbox"/>		<b>Flashings at Transitions:</b> Durable corrosion resistant flashings are shown integrated in a weather-lapping manner into the envelope system at all material transitions, horizontal trim surfaces, and as otherwise deemed prudent by the Architect. Flashings are specified to slope at horizontal surfaces to guide water away from the building envelope. Drips at terminal edges are shown.	
06.15	R	<input type="checkbox"/>		<b>Grade to Cladding Separation:</b> Building cladding is held up away from grade at least 8 inches unless durably and aesthetically designed for less separation.	
06.16	R	<input type="checkbox"/>		<b>Grade at Building Perimeter:</b> Sloped to drain away from the building foundation. A low to zero maintenance design for stormwater drainage and management at the building perimeter is reflected in the drawings. Plant materials are kept clear of the building perimeter. A low maintenance non-vegetative groundcover designed to minimize storm and irrigation related 'splash-up' on the building envelope is shown.	

## 5b.07 Dwelling Units : General

No.	G : R	√	CD Ref.	Item	OHCS Guidance Ref.
07.01	R	<input type="checkbox"/>		Unit common spaces i.e. Living, Dining, Kitchen spaces are sized appropriately for the overall size size of the unit. For example, a living room in a 1000 SF apartment is designed to be larger than a living room in an 800 SF apartment.	
07.02	R	<input type="checkbox"/>		Kitchens in three bedroom apartments have been designed to accommodate at least 2 people working in the space at the same time.	
07.03	R	<input type="checkbox"/>		The drawings show hypothetical furniture layouts for the typical unit types proposed. To the greatest extent possible the units have been sensitively designed to accommodate "real life" expected use scenarios of the future inhabitants, on reasonable expected furnishings, on reasonable sizes of the furnishings, on reasonable spacing between furnishings, and on circulation needs generally.	
07.04	R	<input type="checkbox"/>		The proposed design maximizes the efficiency of the space by avoiding hallways and other spaces devoted more to circulation than to usable "living" space.	
07.05	R	<input type="checkbox"/>		The design maximizes the flexibility and openness of the spaces to the greatest extent possible by balancing the use of walls with maximizing visual continuity across the unit and to windows.	
07.06	R	<input type="checkbox"/>		In units with two or more bedrooms, bathrooms not associated with a master bedroom are designed such that they	

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# OHCS Design Standards Checklist 5b

Refer to Section 5a of this Manual for instructions on the use of this form.

				are not accessed directly from any of the main spaces but rather access is achieved via a transition space.	
07.07	R	<input type="checkbox"/>		All bedrooms have been sensitively configured with respect to their space, window and door locations, and heat source locations such that they are capable of being furnished with two twin beds.	
07.08	R	<input type="checkbox"/>		Eight foot (nominal) or greater ceiling heights have been provided. 7'-6" ceiling heights (minimum) are permissible where necessitated by more dominant design goals. Soffited areas can be a minimum of 7'-0" AFF where the affected area does not exceed 20% of a room's total area.	
07.09	R	<input type="checkbox"/>		Interior doors have been specified to have a ¾ inch gap between the bottom of the door and the floor finish to allow for air circulation.	

## 5b.08 Dwelling Unit Size & Room Size Standards

No.	G : R	<input type="checkbox"/>	CD Ref.	Item	OHCS Guidance Ref.
08.01	R	<input type="checkbox"/>		Dwelling Unit Sizes of the proposed design comply with Table 5b.08.01.	

Unit Type	Min. Unit Floor Area (Sq. Ft.)	Max. Allowable Unit Floor Area (Sq. Ft.)	
		Units other than Townhouses & Accessible Units	Townhouses and Accessible Units
SRO	175	---	---
Studio	350	---	---
1 Bed/ 1 Bath	600	690	740
2 Bed/ 1 Bath	800	900	950
3 Bed/2 Bath	1,000	1,200	1,250
4 Bed/2 Bath	1,250	1,400	1,450
ALF/RCF Studio	300	---	---
ALF/RCF 1 Bed	450	---	---

See Appendix "B" for OHCS Approved Area Calculation Methods

08.02	R	<input type="checkbox"/>		Living Rooms in dwelling units other than Studio Apartments are designed to be a minimum of 150 SF in size and are 10 feet or greater in width and length.	
08.03	R	<input type="checkbox"/>		Habitable rooms other than Living Rooms are designed to be a minimum of 100 SF in size and are 9 feet or greater in width and length.	
08.04	R	<input type="checkbox"/>		Dwelling Unit SF sizes have been clearly indicated on the Floor	

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Refer to Section 5a of this Manual for instructions on the use of this form.

10.02	R	<input type="checkbox"/>		One and two bedroom units have been designed with at least one but no greater than one full bathroom. An exception can be granted for adding an additional bathroom in 2 bedroom units if the target population justifies the exception and the Agency has approved the exception. See Section 5a, Part 5a.10 for Variance Requests.
10.03	R	<input type="checkbox"/>		If the proposed design includes new Townhouses then a half bathroom has been included on the main grade-level floor and the walls of the bathroom have been reinforced where appropriate to accept either immediate or future installation of accessibility grab bars. <i>(Write "NA" in the CD Ref. column if this item does not apply to the proposed design - <u>do not</u> place a checkmark in the check box.)</i>
10.04	R	<input type="checkbox"/>		Water resistant and mold resistant gypsum board or Agency approved equal has been specified for walls and ceilings. Other floor and/or wall substrates have been specified as appropriate based on the proposed room finish i.e. cement board under ceramic tile, etc.

## 5b.11\_Laundry

No.	G : R	√	CD Ref.	Item	OHCS Guidance Ref.
11.01	R	<input type="checkbox"/>		The manner and degree to which laundry space and equipment have been included in the design is at least equal to what similar conventional market-rate housing developments in the local community provide but in no case has less than the following been provided: (i) Laundry space has been provided either within each unit and/or in a shared laundry room(s) within the building or complex. (ii) Units having three or more bedrooms have been provided with a laundry space and associated hook-ups within the dwelling unit. (iii) Where laundry facilities have been provided within the dwelling unit, the space provided is a minimum of 36 inches deep measured from the back wall to the inside face of the door when the door is fully closed.	
11.02	R	<input type="checkbox"/>		Accessibility related maneuvering space has been provided at laundry facilities/spaces as applicable.	
11.03	R	<input type="checkbox"/>		If laundry spaces have been provided within the dwelling unit, a minimum 32 square inch area ventilation grill or similar visually finished vent has been provided in the upper portion of the door or in the wall above the door to facilitate ventilation. <i>(Write "NA" in the CD Ref. column if this item does not apply to the proposed design - <u>do not</u> place a checkmark in the check box.)</i>	

# 5b OHCS Design Standards Checklist

Refer to Section 5a of this Manual for instructions on the use of this form.

## 5b.12 Storage

No.	G : R	√	CD Ref.	Item	OHCS Guidance Ref.
12.01	R	<input type="checkbox"/>		A coat closet located near the front door has been included in the proposed design.	
	R	<input type="checkbox"/>		Linen storage located near the bedroom(s) and/or bathroom(s) has been included in the proposed design. Storage can be provided via a closet(s) or built-in cabinetry.	
12.02	R	<input type="checkbox"/>		A clothes closet at least equal in size to similar “market rate” housing developments has been provided in each bedroom. Where ‘walk-in” closets have been provided that are 36 inches or greater in depth from the back wall to the door, an overhead light operated by a wall switch has been provided.	
12.03	R	<input type="checkbox"/>		A minimum 32square inch area ventilation grill or similar visually finished vent has been provided in the upper portion of the door or in the wall above the door of all clothes and storage closets to facilitate ventilation.	
12.04	R	<input type="checkbox"/>		Additional household related storage space has been provided to the greatest extent practical but in no case has each dwelling unit been provided with dedicated storage space available to the tenant that that is less than similar conventional market-rate housing developments in the local community.	

## 5b.13 Elevator

No.	G : R	√	CD Ref.	Item	OHCS Guidance Ref.
13.01	R	<input type="checkbox"/>		In addition to elevator requirements that may apply based on authority outside OHCS, at least one elevator serving all floors has been provided in buildings of 2 stories or more where both of the following conditions apply: (i) Where the building contains dwelling units that are entered from floors other than the ground floor and (ii) Where the building is intended to serve a disproportionately high number of disabled or elderly people. A Variance Request addressing this Standard may be granted in some specialized circumstances. See Section 5a, Part 5a.10 for Variance Requests. (Write “NA” in the <u>CD Ref.</u> column if this item does not apply to the proposed design - <u>do not</u> place a checkmark in the check box.)	

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## OHCS Design Standards Checklist 5b

Refer to Section 5a of this Manual for instructions on the use of this form.

## 5b.14 Interior Finishes

No.	G : R	√	CD Ref.	Item	OHCS Guidance Ref.
14.01	R	<input type="checkbox"/>		Floor Finishes: The architect has specified easily obtainable, easily repairable, highly durable finishes. Finishes have been specified to perform well under the conditions predicted for each area and its use. Use of wall to wall carpet is highly discouraged due to the difficulty of repair, the propensity for it to hold allergens and to promote other negative indoor environmental impacts, its high life cycle cost, and the high environmental impacts related to its production, relatively short service life and its disposal.	
14.02	R	<input type="checkbox"/>		Low VOC paint has been specified.	
14.03	R	<input type="checkbox"/>		Materials that do not emit urea-formaldehyde or other harmful gases have been specified	
14.04	R	<input type="checkbox"/>		Vertical vinyl window blinds have been specified for all windows.	

## 5b.15 HVAC / Plumbing / Electrical

No.	G : R	√	CD Ref.	Item	OHCS Guidance Ref.
15.01	R	<input type="checkbox"/>		Water conserving fixtures have been specified on all faucets, shower heads, and toilets.	
15.02	R	<input type="checkbox"/>		The plumbing drawings/specifications indicate that the use of offset toilet flanges is prohibited.	
15.03	R	<input type="checkbox"/>		Prefabricated shower and/or bathtub units have been specified to have factory installed integral reinforcing at the grab bar compliant locations of the unit.	
15.04	R	<input type="checkbox"/>		Rear draining Kitchen sinks have been specified.	
15.05	R	<input type="checkbox"/>		Electric water heaters with an Energy Factor rating of at least 93% have been specified.	
15.06	R	<input type="checkbox"/>		A centrally located overhead ceiling light and a vanity light centered over the sink has been specified at all full bathrooms. The two lights have been specified to be independently controlled by separate wall switches.	
15.07	R	<input type="checkbox"/>		An exhaust fan controlled by the same switch that operates the centrally located ceiling light fixture has been specified at all bathrooms.	
15.08	R	<input type="checkbox"/>		Overhead lighting with a wall switch is specified for all bedrooms and living rooms.	
15.09	R	<input type="checkbox"/>		A ceiling fan with wall switch has been specified for each bedroom and for the living room. If the ceiling fan is combined	

## 5b OHCS Design Standards Checklist

Refer to Section 5a of this Manual for instructions on the use of this form.

				with a light, the light and fan are specified to be switched (controlled) independently from each other.	
15.10	R	<input type="checkbox"/>		In the Common Areas, Energy Star labeled or high efficiency commercial grade light fixtures have been specified.	
15.11	R	<input type="checkbox"/>		Telephone and cable jacks have been specified and conveniently located in each bedroom and in the living room.	
15.12	R	<input type="checkbox"/>		An emergency pull station with visual/audible alarm has been specified and conveniently located in all bathrooms and in the "master" or primary bedroom of all Type A Accessible dwelling units.	
15.13	R	<input type="checkbox"/>		The range power receptacle is specified to be recessed in the wall or as otherwise required to allow the back of the range to fit snugly against the wall.	
15.14	R	<input type="checkbox"/>		Electric circuit distribution panels in Type A and in Type B Accessible dwelling units are specified to be mounted such that the top circuit breaker is no greater than 48 inches AFF.	

### 5b.16 Appliances

No.	G : R	√	CD Ref.	Item	OHCS Guidance Ref.
16.01	R	<input type="checkbox"/>		All Appliances have been specified to be Energy Star rated.	

### Special Requirements by Housing Construction Type and/or Housing Intended Primarily for a Specific Demographic.

The Parts of the Standards Checklist that follow are additional requirements that apply to housing associated with a specific construction type or intended for a high concentration of a specific resident demographic. The following Parts of the Standards Checklist may not apply to some projects.

### 5b.17 Housing with Children

Part 5b.17 Does Not Apply.

Check this box if this Part of the Standards Checklist does not apply to the subject project, leave the rest of this Part of the Checklist unchecked and move to the next Part of the Checklist.

No.	Class	√	CD Ref.	Item	OHCS Guidance Ref.
17.01	R	<input type="checkbox"/>		At least one (1) on-site play area(s) for children under 6 years of age have been provided in the project plans. The play area(s) incorporate provisions for adults to sit near the play area(s). To the greatest extent possible, play areas have been located such that the area(s) are viewable from as many apartment units as possible and such that children do not need	

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# OHCS Design Standards Checklist 5b

Refer to Section 5a of this Manual for instructions on the use of this form.

			to cross roadways and parking areas to access the play area(s) from their dwelling units.
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### 5b.18\_Housing for Seniors

Part 5b.18 Does Not Apply.

Check this box if this Part of the Standards Checklist does not apply to the subject project, leave the rest of this Part of the Checklist unchecked and move to the next Part of the Checklist

No.	Class	√	CD Ref.	Item	OHCS Guidance Ref.
18.01	R	<input type="checkbox"/>		Emergency pull-chain alarms with visual strobe and audible alarm including audible enunciator at building exterior have been specified at all master bedrooms and full bathrooms.	
18.02	R	<input type="checkbox"/>		Loop handles on all cabinets and drawers have been specified.	
18.03	R	<input type="checkbox"/>		Single lever faucet controls have been specified in all kitchens and baths.	
18.04	R	<input type="checkbox"/>		Remote switching with separate switching for fan and light at all kitchen range hoods have been specified.	
18.05	R	<input type="checkbox"/>		Lever handsets have been specified on all doors.	
18.06	R	<input type="checkbox"/>		A maximum ½ inch threshold height has been specified at all entry doors.	
18.07	R	<input type="checkbox"/>		All hallways are specified to be a minimum of 42 inches wide.	
18.08	R	<input type="checkbox"/>		All passageway/room doors are specified to be a minimum of 36 inches wide.	
18.09	R	<input type="checkbox"/>		Offset controls have been specified on all bathtubs and showers.	
18.10	R	<input type="checkbox"/>		Blocking for grab bars is indicated at all toilets and tub/shower units.	
18.11	R	<input type="checkbox"/>		Handrails in all common area corridors are shown to be mounted 34 inches AFF.	

### 5b.19\_Manufactured Housing

Part 5b.19 Does Not Apply.

Check this box if this Part of the Standards Checklist does not apply to the subject project, leave the rest of this Part of the Checklist unchecked and move to the next Part of the Checklist.

No.	Class	√	CD Ref.	Item	OHCS Guidance Ref.
				(Reserved)	

## 5b OHCS Design Standards Checklist

Refer to Section 5a of this Manual for instructions on the use of this form.

### 5b.20 Architect's Endorsement

**Project Architect:**

Sign and submit the completed Standards Checklist with Submittal-4 (See Section 2, Part 2.07.04 of this Manual)

_____ Signature of Project Architect	_____ Date
_____ Printed Name	_____ Firm Name

# Sustainable Design Path Overlay **6**

## 6.01 \_\_\_ Section Overview

The Agency requires that projects receiving funding through Agency administered Programs demonstrate a commitment to sustainable design and construction practices. In addition to the Baseline Design Requirements defined in Section 4, and the OHCS Design Standards defined in Sections 5a and 5b of this Manual, the Agency requires that the Sustainable Design practices defined by one of the 3<sup>rd</sup> party programs listed in Part 6.02 of this Section be integrated into the project's design.

## 6.02 \_\_\_ OHCS Approved Sustainable Design Paths

Unless exempted from all or portions of the requirements defined in this Section per Part 6.04 of this Section, one of the following Sustainable Building Standards must be integrated into the project design:

- Enterprise Green Communities
- Earth Advantage Homes
- Leadership in Energy and Environmental Design (LEED)

### **Important**

Before committing to one of the Agency approved sustainable design paths the Project Owner should familiarize themselves with the program requirements of the path they are considering and confirm program expectations with a 3<sup>rd</sup> party program facilitator certified by the program of interest.

## 6.03 \_\_\_ Notification of Selected Path

The project owner must notify OHCS of the Sustainable Design Path they have chosen for the project as part of Submittal-1 (See Part 2.07.01 for Submittal-1 details).

## 6.04 \_\_\_ Exemption from Requirements of this Section

Refer to the Preface at the beginning of this Manual (Section i).

## 6.05 \_\_\_ Certification

The Project Owner's Team must comply with all the requirements of their selected Sustainable Design Path. Upon completion of the Project, the Project Owner must provide to OHCS a Certification and/or any associated documentation provided by the Sustainable Design Path Program that the project was completed according to the Standards of the selected program.

## 6.06 \_\_\_ OHCS Alternate Path

If the project cannot be served by one of the Standard paths listed in Part 6.02 of this Section, the Project Owner may issue a Variance Request to the Agency (See Section 5a, Part 5a.10 of this Manual). A rationale must be provided in the Variance Request for why the project cannot comply with one of the Standard paths. If the Variance Request is deemed acceptable by the Agency, the Agency will require that the project comply with an alternate sustainable path developed by OHCS for projects that have demonstrated unique circumstances that justify using the Alternate Path.

## 6 Sustainable Design Path Overlay

### 6.07 \_\_\_ Quality Controls & Compliance

OHCS reserves the right to rescind project funding, including LIHTC and OAHTC allocations or other funding disbursements, if the chosen sustainable path is not successfully completed and Sustainable Design Path Certification has not been obtained within the expected timeframe.

# OHCS Construction Phase Engagement **7**

## **7.01 \_\_\_ Section Overview**

Section 7 of the PDM defines the Construction Phase involvement the Agency will have in projects funded by Agency administered programs.

## **7.02 \_\_\_ Scope and Purpose of OHCS Involvement During Construction**

The Agency requires that the Project Owner keep the Agency apprised of construction activities, construction progress, and issue resolution during the construction phase of the project so that the Agency can be assured that Program requirements for the project are being satisfactorily executed. During construction, the Agency maintains a supportive role by clarifying Program/Agency requirements and working closely with the Owner's Team to keep the project design priorities, schedule and budget on track. In order to fulfill this responsibility, the Agency requests and reviews certain construction related documents and will conduct periodic construction observation visits over the course of the construction period. The Agency's Construction Phase Document Review and Construction Observation involvement is defined in more detail in Parts 7.04 and 7.05 of this Section.

## **7.03 \_\_\_ Exemption from Requirements of this Section**

Refer to the Preface at the beginning of this Manual (Section i).

## **7.04 \_\_\_ OHCS Construction Phase Document Review**

In addition to the Construction Documents that are submitted to the Agency as required under Part 2.08 of Section 2 of this Manual, the Agency requires that the documents listed in part 7.04.01 of this Manual are periodically uploaded to the project's web-based document hub. Typically, the required documents are uploaded monthly or semi-monthly in association with the project's construction site team meetings and/or Construction Draw Meetings. The precise method and timing of this document transmission is discussed between the Agency's Architect and the Owner's Project Team prior to, or early in the construction phase of the project. The Owner's Team must make contact with the OHCS Architect early during construction if the OHCS Architect has not already initiated this contact.

### **7.04.01 Periodic Construction Progress Related Document Submittals**

See 7.04 for general timing expectations and submittal method for the following documents:

- 1) General Contractor Payment Application (Form AIA G701)
- 2) Architect's Invoicing
- 3) Architect's Construction Observation Reports
- 4) Change Order Log
- 5) RFI Log
- 6) Submittal Log
- 7) Construction Meeting Minutes
- 8) Special Inspection Reports
- 9) Project Schedule Updates
- 10) Other Documents as Deemed Necessary or Prudent by the Agency

## **7.05 \_\_\_ OHCS Construction Site Visits**

The Agency conducts periodic Construction Observation visits to the project site during the construction period to determine if the project is being executed in accordance with funding program requirements

## 7 OHCS Construction Phase Engagement

and Agency's expectations generally. Typically, Agency visits to the construction site occur monthly but are more precisely coordinated with the Owner's Team on an ongoing basis so that the maximum advantage can be taken from the visit for both the Agency and the Owner's Project Team. The general timing and frequency of the construction site visits is discussed with the owner's team prior to, or early in the construction phase.

### 7.05.01\_\_OHCS Construction Site Visit Reports

The Agency records the observations made by the Agency Representative for each construction site visit. If issues or concerns are observed by the Agency Representative during the visit, these items are brought to the attention of the Owner's Team in the form of a Site Visit Report issued by the Agency. (See Owner Responsibilities; Part 7.04 of this Section).

### 7.06 \_\_\_Owner Responsibilities Related to OHCS Construction Phase Engagement

The Agency may suggest or require clarifications or revisions to the construction documents or require responses from the Owner's Project Team based on the documents that are submitted to the Agency or on Observations of the construction by the Agency's Representative. The Project Owner and their Team are obligated by their acceptance of funding from one or more Agency administered Programs to energetically engage with the Agency in reaching satisfactory resolution to the issues or concerns expressed by the Agency. Failure to reach satisfactory resolution of Agency identified issues or concerns may lead to project schedule delays, and may jeopardize project funding from the Agency.

### 7.07 \_\_\_OHCS Construction Administration Consultants

The agency may engage a Construction Administration Consultant (CA Consultant) to assist the Agency with document review and construction observation tasks. The CA Consultant may be asked by the Agency to have direct communications with the Owner's Team during the construction period. The project specific communication protocols to be used between the Agency, Owner's Team, and the CA Consultant will be established prior to, or early in the Construction Phase.

### 7.08\_\_\_Agency Required PDP Submittals During the Construction Period

See Section 2, Part 2.08 of this manual for important Construction Phase document submittals required by the Agency.

# Appendix A & B

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Definitions

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Area Calculation Methods

# A -- Appendix : Definitions

The following abbreviations, acronyms and terms have been used in the body of the PDM and are defined and/or explained as follows:

<b>Agency</b>	As used in this Manual this term refers to Oregon Housing and Community Services (OHCS)
<b>CA</b>	Construction Administration
<b>CD</b>	Construction Document
<b>CFR</b>	Code of Federal Regulations
<b>CNA</b>	Capital Needs Assessment
<b>DSL</b>	Oregon Department of State Lands
<b>EIFS</b>	Exterior Insulating Finish System (Synthetic Stucco)
<b>HDG</b>	Hot Dipped Galvanized
<b>HOME</b>	HOME Investment Partnerships Program
<b>HVAC</b>	Heating Ventilation and Air Conditioning
<b>ICC</b>	International Code Council
<b>LEED</b>	Leadership in Energy and Environmental Design
<b>LIHTC</b>	Low Income Housing Tax Credit
<b>Manual</b>	Refers to the OHCS Project Development Manual or PDM
<b>NA</b>	Not Applicable
<b>NEPA</b>	National Environmental Policy Act
<b>NOFA</b>	Notice of Funding Availability
<b>OAHTC</b>	Oregon Affordable Housing Tax Credit
<b>OHCS</b>	Oregon Housing and Community Services also; "Agency" as used in this Manual
<b>OSSC</b>	Oregon Structural Specialty Code
<b>Owner</b>	As used in this Manual this term refers to the Owner of a project that has been accepted to participate in one of OHCS' funding programs
<b>Part</b>	When capitalized and used in this Manual this term refers to numbered references within the Sections of this Manual
<b>PDD</b>	As used in this Manual: <u>Project Development Document</u> . As used in this Manual, Project Development Documents refer to any project design or construction related documents.
<b>PDM</b>	As used in this Manual: <u>Project Development Manual</u> (this Manual)
<b>PDP</b>	As used in this Manual: <u>Project Development Process</u>
<b>RCL</b>	As used in this Manual: <u>Reservation and Conditions Letter</u> (Issued by OHCS)
<b>Section</b>	When capitalized and as used in this Manual this term refers to the Sections that make up the PDM (this Manual).
<b>SF</b>	Square Feet
<b>SMP</b>	Stormwater Management Plan
<b>UFAS</b>	Uniform Federal Accessibility Standards
<b>USDA</b>	United States Department of Agriculture
<b>WDO</b>	Wood Destroying Organism

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## Area Calculation Methods : Appendix -- B

The following OHCS Approved Methods for Calculating Floor Areas shall be used:

### **Calculating Unit Floor Area**

Floor areas for each unit shall be determined using the following methods, based on the unit placement in a particular building:

- Outside face of exterior wall to outside face of exterior wall.
- Outside face of exterior wall to center of party wall.
- Outside face of exterior wall to hall face of corridor wall.
- Center of party wall to center of party wall.

All interior spaces, walls, structural elements and voids will be included in the calculated floor area, except as specifically excluded below.

### **Exclusions:**

- In multi-story units, the floor area dedicated to stairs should only be counted once, for a total maximum exclusion of 50 (fifty) square feet.
- Vertical Mechanical and Electrical chases will be excluded from unit floor area calculations.
- Balconies, porches, patios and exterior storage spaces will be excluded from unit floor area calculations.

### **Calculating Room Floor Area (Net Useable Area)**

Floor area for each room will be calculated by measuring to the inside face of each wall.

### **Calculating Total Building Floor Area (Gross Area):**

- Calculating total building area shall be determined as follows:
- Total building floor area will be the sum of the areas enclosed by the exterior face of the exterior walls on each floor.
- Balconies, porches and patios will be excluded from calculation of total building floor area.

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# Appendix C

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## Forms

**C -- Appendix : Forms**

The following Forms are included as part of the PDM and are located on the pages that follow. A note indicating *(reserved)* after the form number in the list below means that it is still in development and will be published shortly after the applicable NOFA is issued. Contact the Agency with any questions regarding Form availability.

- A-VR      OHCS Design & Construction Standards Variance Request**
  
- A-CR      Owners PDP Closeout Report**
  
- A-AS      Architect’s Certification 1 of 2 : Substantial Completion**
  
- A-AF      Architect’s Certification 2 of 2 : Final Completion**
  
- A-CC      Owner’s Construction Cost Report  
*(reserved)***

Form **A-VR**

Date	
Project Name	
Project Owner	
Project Address	
Project Architect	
Architect's Firm	

**OHCS Design & Construction Standards Variance Request**

Official Use:

- Approved
- Approved w/Conditions
- Not Approved
- Not Reviewed
- See Attached OHCS Comments

Date:

By:

**1** Briefly state the OHCS Standard or Project Requirement this Variance Request is addressing.

**5** Owner's Signature (Required)  
X

**2** If applicable, indicate the PDM reference number for the Standard or requirement being addressed.

**6** Architect's Signature (Required)  
X

**3** Indicate which parts of the project the Variance Request applies to i.e. identify which apartment units/spaces are affected. State "All" if the Variance Request applies to the entire project.

**4** State the rationale for the Variance Request i.e. Unreasonable Cost, Conflict in the Standards, etc. Provide information that supports how the project is improved or not diminished by the proposed request. Provide any proposed alternate approaches. Attach drawings and use additional sheets to support the Variance Request as needed.

Check this box if additional sheets or attachments are included with this Variance Request.

**IMPORTANT:** The signatures of the Project Owner and the Project Architect on this form signify that the Owner's Team has thoroughly examined the proposed Variance in context with the other Standards and requirements that have a bearing on the subject project and has determined that the proposed Variance does not conflict with any such Standard or requirement. OHCS approval of Variance Requests is subject to the Project Owner accepting full responsibility for their team making this determination.

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Date	
Project Name	
Project Owner	
Project Address	

**Owner's PDP<sup>1</sup> Closeout Report**

Official Use:

- Approved
- Forwarded to OHCS Loan Officer

Date:

By:

**1** In addition to other program related final tasks and documentation requested separately by the OHCS Loan Officer, the following Construction Closeout related tasks and project documentation are required to complete the project and to receive all final disbursements of funds from the Agency. A checkmark is required in one of the boxes provided for every item listed below and signifies that the Owner has personally verified that the associated task has been completed as of the date of this form. Submit this form with any documentation required by OHCS if it has not already been transmitted to the Agency. Sign this form before issuing to the Agency.

**2** Owner's Signature (Required)

X



**Note:**

Submit the documents listed below to both the OHCS Architect and, if applicable, to the Agency's CA Consultant. Except for Documents required in 'hard copy' format, all documents should be transmitted electronically in PDF. To the greatest extent possible, transmit all of the documents requested at one time and include this signed form with the submittal. Documents listed below that are required in 'hard copy' format should be sent only to the OHCS Architect. Do not include this form with the 'hard copy' document submittal.

No.	√	NA <sup>2</sup>	Required Task / Documentation	OHCS Comment
1.01	<input type="checkbox"/>	<input type="checkbox"/>	Application and Certification of Payment [AIA Form G702] marked "Final" and certified by the Architect.	
1.02	<input type="checkbox"/>	<input type="checkbox"/>	Signed Contractor's Affidavit of Payment of Debts and Claims [AIA Form G706].	
1.03	<input type="checkbox"/>	<input type="checkbox"/>	Signed Consent of Surety to Final Payment [AIA Form G707] – as applicable.	
1.04	<input type="checkbox"/>	<input type="checkbox"/>	Complete set of final "As-Built" Construction Drawings inclusive of all design disciplines and a final "AsBuilt" copy of the Project Manual; both volumes having been reviewed and deemed acceptable by the Architect. Both documents are to be labeled "As-Built" and bear the date of issue as the As-Built versions. See Section 2, Part 2.09.03 of the PDM for hard-copy submittal requirements for these documents.	
1.05	<input type="checkbox"/>	<input type="checkbox"/>	Architect signed Form A-AF (Architect's Certification 2 of 2 : Final Completion). See <u>Forms</u> in Appendix C of the PDM. Include form A-AF signed by the Architect with submittal of this form unless it has already been submitted to the Agency directly by the Architect.	

...Continued on Page 2 of 2

# A-CR Form

No.	√	NA <sup>2</sup>	Required Task / Documentation	OHCS Comment
1.06	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><b>Owner Declaration 1 : Receipt of Final Record Documents</b></p> <p>By checking the box associated with this item, I declare that as of the date of this form, I have received a complete and neatly organized set (minimum of one set each) of the following documents which have been reviewed and approved by the Project Architect and which I will retain for Building Owner records and reference purposes:</p> <ul style="list-style-type: none"><li>• All Operation and Maintenance (O&amp;M) Manuals</li><li>• All Product Submittals</li><li>• Bound Set of Construction Drawings inclusive of all design disciplines and a copy of the Project Manual reflecting all changes to the project that occurred during construction. The set should be marked "<u>As-Built</u>" and bear an As-Built set date.</li></ul>	
1.07	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<p><b>Owner Declaration 2 : Project is Complete</b></p> <p>By checking the box associated with this item, I declare that as of the date of this form, the scope of work as defined by the Construction Documents has, to the best of my knowledge, been fully constructed, including all "punchlist" items, and has attained a level of completeness whereby it can be immediately, fully, and safely occupied and utilized for its intended purpose.</p>	

Footnotes:

1. PDP : Project Development Process. See Section 2 of this Manual.
2. NA : Not Applicable. Check this box if the item requested does not apply to the subject project. Provide a brief explanation for why the item does not apply on a separate sheet and submit with this form.

Date

Project Name

**Architect's Certification 1 of 2  
Substantial Completion**

Project Owner

Project Address

Project Architect

Architect's Firm

Official Use:

- Approved
- Forwarded to OHCS Loan Officer

Date:

By:

**1** Determine/Verify the regulatory bureau/agency approval requirements for the project per the statements under items 1.01 and 1.02 below. Sign and submit this form to the Owner and to the Agency with Submittal-6 (See Section 2, Part 2.08.02 of the PDM for details regarding Submittal-6).

**2** Architect's Signature (Required)  
  
X

No.	✓	NA <sup>1</sup>	Required Task / Documentation	OHCS Comment
1.01	<input type="checkbox"/>	<input type="checkbox"/>	A Certificate of Occupancy has been issued by the local Building Department and a copy of the C of O is attached herewith.	
1.02	<input type="checkbox"/>	<input type="checkbox"/>	I have verified that all building development related City/County/State inspection "finals" have occurred that may be needed either in addition to, or in lieu of a Certificate of Occupancy (C of O) from the local Building Department. I have listed any such inspection "finals/approvals" below and I have attached the applicable final approval documentation for each entity with this form. (Example: Fire Marshal approval of fire suppression system, State elevator approval, Mechanical and Electrical Trade inspection finals if not covered under C of O, Etc.) If none, then state "None" in the list below. Attach additional sheets if necessary.	

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>

Footnotes:

- 1. NA : Not Applicable. Check this box if the item requested does not apply to the subject project.

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Date

Project Name

Project Owner

Project Address

Project Architect

Architect's Firm

**Architect's Certification 2 of 2**  
**Final Completion**

Official Use:

- Approved
- Forwarded to OHCS Loan Officer

Date:

By:

**1** Place a checkmark in the boxes associated with the items below. Sign and submit this form to the Project Owner and the Agency when the project achieves Final Completion.

**2** Architect's Signature (Required)

X

No.	<input checked="" type="checkbox"/>	Required Task / Documentation	OHCS Comment
1.01	<input type="checkbox"/>	<p><u>Architect Declaration 1</u> : Review and Acceptance of "As-Built" Drawings and Project Manual.</p> <p>I have reviewed and I deem the "As-Built" Drawings and Project Manual to be acceptable and, to the best of my knowledge, a copy of these "As-Built" documents has been transmitted to the Owner for their use as record and reference documents.</p>	
1.02	<input type="checkbox"/>	<p><u>Architect Declaration 2</u> : Project is Complete</p> <p>By checking the box associated with this item, I declare that I, or a member of my staff, have conducted periodic Construction Observation visits to the project site and that as of the date of this form, the scope of work as defined by the Construction Documents has, to the best of my knowledge, been satisfactorily completed, including all "punchlist" items.</p>	

End Form A-AF.

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