

# 2021 NOFAs FAQs

Questions as of 04/23/2021

**Please Note:** Last day to submit questions for 9% LIHTC & HOME NOFAs is April 20<sup>th</sup>.

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Please sign up for [E-News](#) to receive the Technical Advisories announcing 2021 NOFAs.

### **General Questions:**

**Question:** Have you made a determination yet if the CNA's will be waived as part of the NOFA application. And then if funded we need to find a way to complete them?

**Answer:** Capital Needs Assessments that are now being prepared by Applicants responding to Department published NOFAs that have an Application deadline of December 31, 2021 or earlier are not required to include 'Needs Assessment' of dwelling unit interiors of units that are currently occupied. If said spaces are not physically inspected as part of the CNA, the CNA must indicate that occupied dwelling unit interiors were not physically inspected. Additionally, the CNA must identify any needs that are known to exist by the Project Owner or their management team. All other areas of the property that typically receive physical entry and/or inspection as part of the CNA are to be included and inspected per the usual industry standard and the Department's current CNA requirements.

**Question:** Do you still plan on releasing your small-projects LIFT NOFA later in the year?

**Answer:** We plan to release a small projects NOFA in summer 2020 and just want to note that this NOFA is funded with a different, more flexible source than LIFT.

**Question:** In the NOFA document on page 11, section 2.1 Pre-Application and Application Access, under Process, it says: "to submit the pre-application and site checklist via email by February 3<sup>rd</sup>, which action will alert OHCS staff to generate Procorem access". However, just below that in italics it reads: "Please note: applications can only be submitted electronically through Procorem.". Please clarify that this note to submit through Procorem only applies to the full application and not the pre-application (which should be submitted via email)? At what point do we need to submit the Official Request for Procorem WorkCenter form (see attached), with the required fee?

**Answer:** The Official Request for Procorem WorkCenter form is only to request a WorkCenter for our noncompetitive funds. The pre-application is the way you officially request the workcenter for our NOFAs. The full application will need to be submitted via Procorem.

## **General Questions as of February 5:**

**Question:** In attempting to complete the OHCS Project Site Review Checklist in its entirety, I have run into difficulty reaching both the city and county offices to obtain the required information. Due to COVID-19 and Gov Brown, most offices are closed to walk in, and numerous employees are working remotely. However, some of the information can be retrieved from the various county/city websites. Is it okay to use this information, or do I actually need to talk to someone?

**Answer:** If you are able to retrieve this information from various county or city websites, that is acceptable, provided that you include the website address that you obtained the information from in the checklist, AND also attach the information from the website in a pdf format.

**Question:** Due to COVID, we are having difficulty reaching contacts to determine soil type and bearings. We contacted the Natural Resource Conservation service, the city and county, who notified us that they do not have/provide this information. Will not being able to provide this answer by deadline preclude us from moving forward with the application process?

**Answer:** For the pre-application, just do your best. I see you've submitted your preapplication already, so this will at least get you access to Procorem. With COVID-19 still around, we are aware of the issues in reaching certain agencies.

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## **General Questions as of February 12:**

**Question:** This question actually applies to all the NOFAs: if we applied last year, which of the following forms can we resubmit as is (as opposed to getting updated)? Zoning approval, Partner MOUs, AFHMP, Authorization and Acceptance and Acceptance, Housing Authority Marketing Commitment, and OMEP Reservation.

**Answer:** For all the NOFAs, the Zoning Approval form is good for 1 year. Last year's Partner MOUs, Housing Authority Marketing Commitment, and OMEP Reservation letter would be accepted with an updated letter or memo from the Provider (MOU Provider, Housing Authority, TRC) saying that the original letter is still active and that they are aware you're re-applying for funds. The Authorization & Acceptance form does not require a wet signature at the time of application. You just need to type the name in the signature field for the application. However, if your project is awarded funds, a new form with wet signatures will be requested. Lastly, the AFHMP will be accepted from last NOFA round, with the understanding that if awarded funds, a updated AFHMP will be provided before construction begins.

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## **General Questions as of February 19:**

**Question:** Is there a formal process we need to go through to make changes from the pre-application to the full application, or can we simply modify them in the full application forms? E.g. unit count, formal change in zoning, etc.

**Answer:** You can modify them in the full application, but please include a memo or letter explaining why the change occurred.

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## **General Questions as of March 12:**

### **Notice regarding approval of Variance Requests related to Laundry Requirement (CDM v.3.1, Chapter 6.1, Item N18.01):**

#### **Applies to the subject NOFA(s) Only (NOFA# 2021-4, 2021-5, 2021-6)**

For the subject NOFA, OHCS will likely approve a Variance Request on this item. The possibility that a Variance Request might not be approved still exists, however, this would occur only if the Agency felt the proposal was insincere in its attempt to offer rational or did nothing to address the need for the proposed alternate to offer some compensating degree of value to the residents (not just to management). The questions listed below are designed to help develop the project team's Variance Request rational. **Variance Requests on this item should be submitted as soon as possible after a Reservation of Funding has been received by the Applicant.**

#### **Instructions:**

Please include a copy of this FAQ item including the questions and the project team's responses as an attachment to the Variance Request. This is not a test - there are no presumed right or wrong responses or responses that are more or less likely to result in a Variance approval. Responses should be short and concise but may be as long as desired. There is no need to respond to every question – respond only to the items you feel are relevant. Your answers will assist with the Agency's continued development of its Housing Development Standards.

#### **Questions:**

- 1) Do you see any housing related costs e.g., cost to operate communal laundry equipment, shifting to the residents as a result of your proposal? If so, how might those added costs be offset or mitigated by property management and/or by the proposed design of the project?
- 2a) When essential functions of living, such as but not limited to laundry, are to be performed in communal settings, what is the project team's vision for how these communal spaces are "value added" amenities that support and enhance the residents' overall experience of living?
- 2b) *Related to item 2a) describe how (if relevant) the items listed below are addressed in the proposed design:*
  - i. *Ease of Access and Use*
  - ii. *Personal Safety and Security; Both personal and personal belongings*
  - iii. *Ambient Environment; Design elements that make the space and/or adjacent supporting spaces a "place for people"- not just a "laundry room" for equipment and laundry tasks.*

- iv. *Connections; physical/visual connection to other communal areas e.g. children's play area, living room, outdoor areas, etc.*
  - v. *Efficiency and Multitasking; E.g. child supervision, reading, telework, computer, etc.*
  - vi. *Community; Ability of the space to support opportunities for people to connect and cooperate in performing basic living activities.*
- 3) Does the proposed design respond to or impact specific project elements identified in any tenant or persons-with-lived-experience focus groups, advisory committees, surveys, etc. Has the proposed design been brought to these groups for review and if so, what was the input?
- 4) Any other comments you would like to add?
- Please contact the OHCS program manager associated with the funding you are interested in if you have further questions.
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### **General Questions as of March 19:**

**Question:** Our development team is exploring use of gas heating, fixtures, etc. NW Natural offers comparable incentive to the Energy Trust and OR MEP programs. If we list NW Natural on our Sources will that be a valid source of funding? We are also including OR MEP.

**Answer:** This is an allowable source, very similar to ETO and the solar grants. When using various energy grants, clearly show in the Uses that you're not using two sources to cover the same cost.

**Question:** The Applicant Charge Transmittal form is only pulling Site A's project address to row 7 and we have two sites as one project. Is it okay to submit the transmittal form this way by which it only lists Site A's address?

**Answer:** Yes, only Site A's information is necessary. Address is included simply to tie the payment to your project application.

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### **General Questions as of March 26:**

**Question:** Has there been any official variation from the number of units required to be visited for a CDM-compliant CNA due to the pandemic? Was wondering if 33% is still required.

**Answer:** Correct - no change. The **interiors of occupied units** is not required due to potential health hazards associated with Covid-19. The CNA needs to identify which occupied units were not inspected and it should include information regarding known "needs" related to the uninspected interiors.

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### **LIFT Rental NOFA:**

Please see [Updated 2020 LIFT FAQ](#) for a summary of 2020 LIFT Rental NOFA FAQ.

**Question:** Is there a unit minimum to apply for the regular LIFT funds?

**Answer:** There is no unit minimum to apply for LIFT funds, however, if you are planning to apply for LIFT Rental funds, your project must be considered a multifamily project, which means that it needs to have more than 4 units.

**Question:** How do we register for the LIFT Rental NOFA Webinar on January 26th?

**Answer:** Registration is over now. Here are the Training Webinar recordings and slides:  
[2021 LIFT Rental NOFA Training Recording](#) & [LIFT Rental NOFA Training Slides](#)

**Question:** Will the HOME fund will be offered as part of the LIFT Rental NOFA. Is that possible to apply for some HOME units in our project while applying for the LIFT Rental fund?

**Answer:** No. LIFT does not pair with 9% LIHTC, HOME funds, or GHAP funds. Per Section 1.2 p 4 of the NOFA, LIFT pairs with 4% LIHTC, OAHTCs, and OMEP.

**Question:** When is the application closing date for 2021 to submit?

**Answer:** March 24, 2021 @ 4pm PST

**Question:** When is a perspective date for the approval for receiving the lift funds?

**Answer:** The final awards will be submitted to HSC in the third quarter of 2021.

**Question:** If a project also wants to apply for the 4% LIHTC program as well as LIFT, can you please clarify exactly what that includes.

**Answer:** For LIFT Rental, the NOFA application takes the place of the 4% LIHTC pre-application. So anything that would be involved with the pre-application would need to be provided at NOFA application. If a project with 4% LIHTC is selected for funding, we would expect that the full application would be due within 90 days of NOFA award and thus the Tier 1 and Tier 2 items will be submitted as usual after that.

**Question:** For the LIFT Rental NOFA, Please clarify that the Site Review Checklist is due with the Pre-Application?

**Answer:** Yes. The site review checklist is due with the Pre-Application.

**Question:** The LIFT Calculator maximum allowable LIFT request field is not auto-populating. Please advise.

**Answer:** A corrected pre-application has been uploaded to this location as of 1/19/21:  
<https://www.oregon.gov/ohcs/development/Pages/nofa21-local-innovation-and-fast-track-lift.aspx>

**Question:** OHCS has shared recently that it might have insufficient bond volume cap in the near future. Is this an issue that might impact LIFT projects awarded resources in the upcoming round, and that would presumably be applying for 4% credits immediately afterwards?

**Answer:** This question is answered in the recently published Updated 2020 LIFT FAQ located here: <https://www.oregon.gov/ohcs/development/Documents/nofa/2021/FAQ/Updated-2020-LIFT-FAQ.pdf> I've included the question and answer here:

*4. If a project receives a LIFT reservation through this NOFA, does the project automatically get a reservation for the bonds? If you apply for LIFT and 4% LIHTC/bond, and are awarded LIFT funds, you will receive a reservation for both LIFT and 4% LIHTC/bonds.*

**Question:** In the instance a project already has committed funds from the 2020 Fall PHB Metro Bond PSH RFQ offering, would OHCS consider a capital stack that includes uncommitted PHB Metro Bond funds (to be awarded through a spring 2021 NOFA) as “realistic” from a financial viability perspective (or readiness to proceed) for a LIFT project?

**Answer:** Any funds that are still uncommitted by the time the application is due will be considered a funding gap for the Financial Viability review, this includes Metro Housing Bonds.

**Question:** For the Pre-app section Project Rents and Income Levels – Should the project rent AMI% be before OAHTCs are applied or after?

Project Rents and Income Levels

|                    | SRO      | STU/OBR   | 1BR       | 2BR       | 3BR       | 4BR+     |            |
|--------------------|----------|-----------|-----------|-----------|-----------|----------|------------|
| 30% AMI            |          | 5         | 9         |           |           |          | 14         |
| 40% AMI            |          |           |           |           |           |          | 0          |
| 50% AMI            |          | 5         | 4         |           |           |          | 9          |
| 60% AMI            |          | 75        | 72        | 30        | 20        |          | 197        |
| >60% AMI           |          |           |           |           |           |          | 0          |
| <b>TOTAL UNITS</b> | <b>0</b> | <b>85</b> | <b>85</b> | <b>30</b> | <b>20</b> | <b>0</b> | <b>220</b> |

**Answer:** Please list the project rents BEFORE OAHTCs are applied.

**Question:** For the LIFT Scoring subsection E - Are points available on affordable units after the OAHTCs are applied or before?

**E. Rents affordable at lower AMI (up to 5 points)**

1. 50% of units affordable at or below 30% AMI, 5 points
2. 40% of units affordable at or below 30% AMI, 4 points
3. 30% of units affordable at or below 30% AMI, 3 points
4. 20% of units affordable at or below 30% AMI, 2 points

**Answer:** This will be based on the affordable units AFTER OAHTCs are applied.

**Question:** For OAHTCs, the maximum I could apply for 8 million loan per project ? Please confirm.

**B. OAHTC**

In addition to the LIFT funds, OHCS will make \$8 million in Oregon Affordable Housing Tax Credits (OAHTC) available where it results in deep rent skewing; serving households at or below 50% AMI. Furthermore, if there is a Project that cannot be funded with the remaining LIFT resources, OHCS may leverage OHCS gap funding resources other than LIFT to fully fund a Project.

**Answer:** The total pool for OAHTCs in the LIFT NOFA is 8 million. We don't have a cap per project.

**Question:** Can you publish the RS Means costs that will be used for the scoring metrics?

**Answer:** The RS Means cost data will be included in the full application.



**Question:** In the LIFT Rental NOFA, page 15 says: 100 points are possible, but with the addition of the 5 points for wildfire disaster area the total points equal 105. Please confirm the new total possible points are 105.

**Answer:** There are 100 points possible. Projects that are located in areas that meet the wildfire disaster designation will get up to 5 bonus points.

**Question:** Regarding Cost efficiency scoring:

A. Please confirm you get 3 points for costs 1-5% more than RS means (it does not say less or more in #4 below from the NOFA).

**Answer A:** Correct, you will get 3 points for costs that are 1-5% more than RS Means.

B. For the calculation of hard costs- below it says “costs (including construction costs and architectural fees). Why are architectural fees included? Architectural costs are soft costs. Last year, you removed architectural costs from the calculation when applicants brought this to your attention.

**Answer B:** Architectural fees are included in the RS Means calculation. As such, to accurately reflect the RS Means, we will be including them in the calculation.

**Question:** Are we allowed to changes either the General Contractor, Architect or Management Company we listed on our pre-application form? Or do these development team members need to be the same for pre-application (due on February 3<sup>rd</sup>) and the final application (due on March 24<sup>th</sup>) .

**Answer:** Yes, you are allowed to change development team members between pre-application and final application if needed.

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### **Questions from LIFT Rental Training Webinar:**

**Question:** Will the training slides or video be available after the call for download?

**Answer:** The slides and a recording will be posted to the OHCS website after the webinar

**Question:** When using OR-MEP in a scattered site, is it \$200K max per site, or would the \$200K apply to the scatted sites as a single project?

**Answer:** It is \$200k per site location - They will require a separate application for each eligible site location.

**Question:** Since the OR-MEP is currently out of money for reservations, would we be penalized if we include this as a source of funding?

**Answer:** As OHCS is including OR-MEP in the this NOFA, no. We will treat any OR-MEP wait list letters as if they were firm funding commitments.

UPDATED ANSWER: Yes, please show this as a source even if only waitlisted. We are comfortable with a rough estimate for OR-MEP in your application and ask that you upload the documentation you receive (into Procorem) from OR-MEP confirming your place on their waitlist and, when you receive it, any notification of funding they provide you. For any questions around the OR-MEP

funding and processes, please connect with Dan Elliot who oversees the program. His email is [Dan.Elliott@oregon.gov](mailto:Dan.Elliott@oregon.gov)

**Question:** What is the max amount of OAHTC per project? Is there any chance the pool will expand?

**Answer:** There is no per project maximum for OAHTC. There is a possibility that the pool could be expanded depending on the level of requests that are received.

**Follow up Question, Part 1:** How much in OAHTC's is okay to ask for?

**Answer:** Ask for what you need, in the past rounds of LIFT we have not had a lot of interest in OAHTC's but we don't know what will happen until we get requests in.

**Follow up Question, Part 2:** The amount of OAHTC's is the amount of credits available, not the dollar loan amount?

**Answer:** Correct, the \$8 million is the amount of OAHTC credits, not how much in loans.

**Question:** Referring to Serving the Communities of Color in Certain rural communities may not be as diverse as urban area. What should developers do to obtain minimum competitive scores?

**Answer:** We don't expect the approaches between Rural and Urban areas to be the same. We know that Rural areas are different and that there are widely varying resources and access to services in different rural areas of our State. The thing to know is that all projects in Urban areas compete against each other and all projects in Rural areas compete against each other.

**Question:** Regarding Annual Compliance Monitoring Costs, to be clear: we pay for BOTH annual LIFT and annual 4% fees?

**Answer:** You pay for the larger fee. You don't add the two fees together.

**Question:** The Site Review checklist seems to request hard copies of certain maps and photographs of buildings. Do you want hard copies submitted?

**Answer:** No, digital copies are fine.

**Question:** Will we need to provide LOI's from lenders / investors with the application?

**Answer:** No, unless you are requesting OAHTC's, then you need a LOI from your OAHTC Lender.

**Question:** How does triggering a BOLI wage determination factor into the comparison to RS means data? Local zoning may require mixed-use development and RS Means doesn't necessarily incorporate prevailing wage data.

**Answer:** That is correct. RS Means is a national average so it likely does not take into account local or in state wage determinations, except by the virtue of it being a national average.

**Question:** How is Development Capacity scored if Sponsor does not have any projects currently tracked in OHCS Portfolio?

**Answer:** Please refer to the Updated 2020 LIFT FAQ - We ask that anyone who does not have portfolio properties with OHCS provide a narrative with their housing development experience, as well as a letter indicating their compliance status with any existing projects.

**Question:** What is the attitude about scattered site projects? Do you prefer that we have separate applications for sites, or would you entertain a scattered site application?

**Answer:** Scattered sites are fine. We used to give bonus points for scattered sites, but we don't do that anymore.

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### **LIFT Rental Questions as of January 29:**

**Question:** If you are committing 10% of your units to be restricted at 30% AMI for LIFT and the rest of your units restricted at 60% AMI by LIHTC, if you use OAHTCs, do the 30% AMI units "count" toward your pass thru, or do you have to reduce rents of your 60% AMI restricted units to meet pass thru?

**Question, Part 2:** To get the points for 30% AMI units, do you have to agree to restrict them at 30% AMI for 20 years under the LIFT program?

**Answer:** If a project is looking to get credit for restricting units at 30% AMI for the LIFT NOFA using OAHTC's, the 30% AMI units would need to be restricted in the OAHTC Declaration as 30% units using the pass-through. The LIFT restrictions would be kept at 60% AMI in this case.

**Question:** Regarding 1.5A Eligible Activity: There are two single family residences, a garage, and a well house on our site which we wish to demolish in order to mitigate insurance risk during the preconstruction phase. Would the demo work render the project ineligible for a LIFT funding award?

**Answer:** Demo work during the preconstruction phase would not render the project ineligible. If you are having tenant relocation as part of this, please remember to request the tenant relocation forms.

**Question:** Is it \$8 million of OAHTC credits that will be made available via the NOFA? Or is it \$8M of OAHTC-supported loan?

**Answer:** It is \$8 million of OAHTC credits.

**Question:** Are LIFT awards limited to \$3 million/project?

**Answer:** The maximum LIFT award per project is based on the per unit subsidy limits outlined on p.5 of the NOFA.

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### **LIFT Rental Questions as of February 5:**

**Question:** Does McMinnville qualify as rural under the exception noted in the rural definition?

**Answer:** McMinnville is located in Yamhill county, which is considered part of the Greater Portland MSA according to Census data. For LIFT purposes, McMinnville has always been considered Urban. Only two new counties were added to the MSA lists in 2020; Linn County and Josephine County. Unfortunately, McMinnville does not qualify under the exception as the population has been over 34k since 2016 which is above the 15k limit.

**Question:** How is the 2021 LIFT NOFA pre-application fee supposed to be paid, and by when?

**Answer:** We don't have a pre-application fee, but we do have a LIFT NOFA application fee that needs to be mailed in with a postmark no later than March 24 2021. We are not set up to take card payments at this time.

**Question:** I noticed that there was a tab in the application for lift that specified NOFA-4. I notice that it is not released according to the website or the technical advisories. However, I don't want to miss submitting for that if I missed a detail there. If projects also intend to apply for NOFA-4, do they need to send checklists for that NOFA by Feb 3?

**Answer:** That is for the 9% LIHTC NOFA which has not been released as yet. At this time, we are only accepting preapplications for the 2021-2 & 2021-6 NOFAs, aka the LIFT Rental and the PSH ones.

**Question:** The NOFA mentioned OHCS published RS Means information. How can an applicant access this data to project a score?

**Answer:** The RS Means data is published in the full application. As such, to gain access to this data, you would need to submit a pre-application to request access to the full application. Otherwise, the information is available from RS Means itself.

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## **LIFT Rental Questions as of February 12:**

**Question:** If we apply for LIFT+4%LIHTC, is the application charge going to be \$3,500 (LIFT \$2500 + 4%LIHTC pre-app \$1000) or the \$5,000 maximum charge?

**Answer:** It would be \$5000 to apply for both LIFT and the 4% Conduit Bond/LIHTC program.

**Question:** Specific to the Cost Containment Scoring Section, for an urban project that has a subterranean garage, would the parking garage be considered a "story". *For example:* Subterranean Garage (1 story), ground floor common areas at street level (1 story), and 6 residential floors = 8 stories.

**Answer:** No, the parking garage would not be considered a story.

**Question:** Is there an opportunity to elaborate why construction costs for the project are higher or lower than the RS Means, for scoring consideration? If so, where?

**Answer:** As for an opportunity to elaborate about the construction costs being higher or lower than the RS Means for scoring consideration, with the application redesign in 2020, a decision was made to make this specific question standardized with no additional narrative component. The drop down just says 'Most similar RS means building type (stories and materials type)' since we are aware that the exact building is not always (or even often) going to be the same.

**Question:** Is Troutdale considered Rural or Urban for LIFT?

**Answer:** Troutdale is considered Urban. It's inside the Portland Urban Growth Boundary.

## **LIFT Rental Questions as of February 19:**

**Question:** Does OHCS have a date by which awards will be made?

**Answer:** We're hoping to take the projects to either the June or July Housing Stability Council meeting.

**Question:** Is it required that there be an arm's length relationship between an architecture firm and a development services contractor?

**Answer:** The CDM does not currently require an arm's length relationship for architectural services.

**Question:** Should we then omit ourselves as a Development Consultant on the Development team page of the application? I couldn't find OHCS definitions for these terms in the CDM.

**Answer:** OHCS does not have definitions for these terms in the CDM. We realize that each project is unique and ask that each applicant do their best to answer the application questions based on their project's specific situation.

**Question:** The site control and evidence form doesn't have an address line. As a scattered-site project, that has a mix of ownership status (full ownership/ option), should we submit one of these forms for each site? If so, is there a naming convention required? Or, should we duplicate the table on a single form and identify each table by site?

**Answer:** This form was originally designed as a 'cover sheet' for the Site Control evidence. As far as naming conventions, please reference the Instructions page on the OHCS Application 2021 LIFT Rental that was uploaded into your workcenter.

**Question:** Is there a formal process we need to go through to make changes from the pre-application to the full application, or can we simply modify them in the full application forms? E.g. unit count, formal change in zoning, etc.

**Answer:** You can modify them in the full application, but please include a memo or letter explaining why the change occurred.

**Question:** Will OHCS be publishing a list of the applicants for 2021 LIFT NOFA?

**Answer:** Yes, it will be posted to our Housing Applicants and Developments webpage soon after the full applications come in, approximately March 26th.

**Question:** When will the next NOFA for the LIFT program open?

**Answer:** The release date for next LIFT NOFA is tentatively scheduled for the first quarter of 2022, depending on results from the Legislative session.

**Question:** In the underwriting guidelines (Section G, pg. 9), the application materials require "Demonstration of meeting BOLI compliance, if applicable." How do we comply with this requirement? For the application we plan to submit, we know that the project will be subject to BOLI commercial wages because of its mixed use nature, and is factored into our construction cost estimate.

**Answer:** The underwriting guidelines (Section G, pg 9) will be applied by OHCS after a NOFA award has been reserved for a project. For more information about BOLI Requirements, please refer to the GPGM,

Section 1.M (<https://www.oregon.gov/ohcs/development/Documents/admin/manual-general-policy-guidelines.pdf>)

**Question:** There isn't any mention regarding the CDM (Core-Development Manual) or proposed plans in the LIFT application. Do you want to see plans or any documentation regarding adherence to the CDM? The project will also be applying for 4% LIHTC funding, so we know it will be required as a part of that application process, but want to make sure we submit all required documents for LIFT as well.

**Answer:** LIFT does not have any requirements in the CDM. However, if you are applying for 4% LIHTC funding, those CDM requirements will need to be met.

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## **LIFT Rental Questions as of February 26:**

### **NOTICE About LIFT Rental and PSH NOFA Applications:**

We have discovered a few items in the NOFA Application that need to be fixed before LIFT and PSH applications are submitted in a few weeks.

#### **How will the application get fixed?**

OHCS will upload fixed NOFA applications all 2021-2 (LIFT Rental) & 2021-6 (PSH) Procorem workcenters on Wednesday, March 3.

#### **How does this affect applicants?**

- If you have already begun filling out the NOFA Application from your workcenter and do not want to start over with the fixed application, please make sure to upload your version into your workcenter no later than midnight on Tuesday, March 2. This way, OHCS will perform the fixes on the application that you have already started to fill out instead of uploading a blank, fixed application to your workcenter.
- Uploading and downloading privileges in the workcenters will be turned off while OHCS staff re-issue or correct the NOFA Applications. Expected timeframe for this freeze in access to the workcenters will be from 7am until approximately 5pm on March 3<sup>rd</sup>.

#### **What do I need to do?**

- If you have already begun filling out the NOFA Application from your workcenter and do not want to start over with the fixed application, please make sure to upload your version into your workcenter no later than midnight on Tuesday, March 2. This way, OHCS will perform the fixes on the application that you have already started to fill out instead of uploading a blank, fixed application to your workcenter.
- If you have not yet starting filling out the application, then you don't need to do anything, but please be aware that uploading and downloading privileges for the workcenters will be turned off while OHCS staff re-issue or correct the NOFA Applications. Expected timeframe for this freeze in access to the workcenters will be from 7am until approximately 5pm on March 3<sup>rd</sup>.

## Questions?

Send questions regarding LIFT applications and workcenters to: [MFNOFA@oregon.gov](mailto:MFNOFA@oregon.gov)

Send questions regarding PSH applications and workcenter to: [HCS.PSH@oregon.gov](mailto:HCS.PSH@oregon.gov)

**Question:** The subsidy limit calculation in the pro-forma does not count a managers unit towards the allowable funding limit. Is a manager's unit excluded from the number of LIFT eligible units?

**Answer:** One manager's unit is allowable for LIFT.

**Question:** On the LIFT NOFA do we use HUD 2020 rents? I can't find a 2021 yet.

**Answer:** Correct, you will use the HUD 2020 rents.

**Question:** On the Proposal Summary tab, one of the required Supplemental Documents identified is a Service to Communities of Color MOU. However, a sample MOU is not provided. What is this MOU and is there specific required content?

**Answer:** While we don't have any examples of a MOU, here are a few items that OHCS looks for in a MOU. These do not need to be in any specific order.

- Identify the Parties involved
- What is the purpose of the MOU?
- How long is the MOU for?
- How will the Parties report on the various outcomes of this partnership?
- Are there any payments taking place between the Parties?
- What are the responsibilities, remunerations, and roles of the various Parties in the MOU?
- Has this been signed by all Parties with a date within the last 12 months?

**Question:** Are you able to define "Community" for me as it relates to the LIFT application? I am trying to determine if our site is defined as a rural site or urban.

**Answer:** Community can be used for city or town. Salem is considered Urban since it's located in a Metropolitan Statistical Area (the Salem MSA which is spread over Polk and Marion Counties).

**Question:** How are studios weighted in the average bedroom size per Project calculation? Is it .75 of a unit like last year or .5 of a unit?

### **B. Unit Size Incentive (up to 5 points)**

1. Projects that have an average bedroom size of 1.50-1.75 bedrooms will receive 1 points
2. Projects that have an average bedroom size of greater than 1.76 and up to 2.00 bedrooms will receive 3 points
3. Projects that have an average bedroom size greater than 2.00 bedrooms will receive 5 points

**Answer:** Studio units are weighted as .5 of a bedroom for this calculation.

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## **LIFT Rental Questions as of March 5:**

**Please Note:** Last day to submit questions for the LIFT Rental NOFAs is March 12, 2021.

**Question:** On the LIFT NOFA instructions tab, the CDD exhibits are not checked as required documents. From the Core-Development Manual, Part 3, CDDs include 3/1 checklist, drawings, AGC-1 and site plan. Is it true that CDDs are not required for LIFT?

**Answer:** This is correct, per the NOFA Section 1.5 E. Construction Standards (p.9): **LIFT Rental requirements are intended to encourage innovation and allow for all types of new construction. All Projects must meet local and state code requirements. If a Project applies for 4% LIHTCs, it is required to follow the OHCS Core-Development Manual (CDM) requirements for that program:** <https://www.oregon.gov/ohcs/development/Pages/core-development-manual.asp>

**Question 1:** We will form an LLLP to own the project in the partnership. That LLLP will be registered in Oregon. Is that enough to meet the ORS, or does our development firm need to also be registered in Oregon?

**Answer:** According to the general terms and conditions section in the LIFT NOFA, foreign corporations must register with the state to conduct business in the state, but they can register after selected for an award. See section 5(ix) on page 23. It will need to be set up prior to closing and disbursing.

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## **LIFT Rental Questions as of March 12:**

**Question:** Is there any way I can write a narrative in Word and then copy and paste it to Procorem (e.g. to a cell on the "Scoring LIFT Narrative" Tab?) My experience is that copying and pasting won't work & when I do type answers directly into the boxes provided, I can't use any formatting like bullets or even have a hard return and start a new paragraph.

**Answer:** You should be able to copy and paste from word into the excel cell(s) that the narrative responses are requiring. To do this, instead of trying to paste the data into the cell itself, you need to use the Formula Bar at the top of the screen. That should allow you to paste everything and retain any formatting. As far as having a 'hard return' in an Excel cell, if you use Alt-Enter in a cell, it will do that. This is for a computer running Windows. Macs apparently use a different one (Command-Option-Enter).

**Question:** in the narrative section of the application, Q. 3 (line 21) asks about the buyer and seller relationship. We are applying for the LIFT for rentals. Is this question intended for only the homeownership NOFA?

**Answer:** No. This is for all our applications. We want to know if you have a relationship with the seller.

**Question:** In the instructions for the Organizational Documents, we are asked to submit "articles of incorporation, and partnership agreements, etc." If we have multiple organizations intended for the sponsorship role (co-sponsorship), should we include articles of incorporation for each of them? The end of that line is "etc" and it's required. Is there a complete list of required documents somewhere?

**Answer:** You can find a full list of what we are looking for under 'Entity Documents' on the Reservation Letter Attachments page: <https://www.oregon.gov/ohcs/development/Pages/nofa-reservation-letter-attachments.aspx>



**Question:** In the narrative section of the application - the first question gives a precise character count limit, but the other questions do not. Does that character count apply for all the questions, or to each of the questions (each gets 1,000), or is there only a limit on the first question?

**Answer:** It's only for that question.

**Question:** I am submitting the same project for two different funding options (LIFT and PSH). Since much of the application is identical, is it possible I could upload one of them once I've filled out the basic project data and have someone essentially save us to the other version (and unlock/swap out the tabs for the second funding source)?

**Answer:** Unfortunately, no. These applications are specifically tied to our internal database record through the Procorem Workcenter. Without getting to involved in explaining how everything is linked together, whatever application is duplicated and resaved as the 'other' project, will completely overwrite the original application instead of populating its own record.

**Question:** Would a manager or building monitor unit where the tenant is income qualified (60% unit) count for the LIFT subsidy? If so do you still want the unit labeled as a manager unit because the current pro-forma does not count a manager unit for the LIFT subsidy cap.

**Answer:** This was one of the fixes that we just pushed out last week. You should have an updated application in the Procorem Workcenter with that correction.

**Question:** We are self-funding. Do we need to provide a either a LOI or bank statements showing available funds?

**Answer:** A letter from your bank stating that you have sufficient funds to fund your project will be acceptable. It needs to be on your bank's letterhead. I believe most banks are familiar with these types of letters.

**Question:** On the LIFT rental app it states there's a 4% supplemental (form?) in procorem, where is it?

**Answer:** There isn't a 4% supplemental form for this. That should have been removed.

**Question:** I'm also not seeing where RS Means is located in the application. Can you point me in the right direction?

**Answer:** The RS Means is located on the LIFT scoring tabs. If you plug in the building type you're closest to, it should show you what the average is.

**Question:** If we're pairing LIFT and 4% LIHTC's do we need to request a separate procorem WorkCenter for the 4% pre-application? Or can we just utilize the WorkCenter assigned to us for LIFT?

**Answer:** If you are pairing LIFT and 4% LIHTCs, you will use the LIFT NOFA workcenter if the project is awarded LIFT funds.

**Question:** Is there a conflict in submitting 2 NOFA's, one multi-family and one home ownership?

**Answer:** No. You can submit for both. It won't penalize you. That being said, standard OHCS practice is that all OHCS fund offerings require that a project have balanced sources and uses to be eligible for funding. If we allowed a project to apply for more than one competitive offering at a time and it wasn't

successful in all competitions needed for balanced project sources and uses, there would be a gap in financing, making the project ineligible for any OHCS funding that it had qualified for.

**Question:** Where the RS Means data resides in the “full application”?

**Answer:** The latest RS Means data is contained in the application. Please see the ‘Cost Containment’ question on the LIFT Quantitative tab. Once you choose your building type from the dropdown menu, the RS Means data will populate automatically.

**Question:** What RS Means Building Construction Costs Book was used as the data sources in this NOFA?

**Answer:** It is the 2020 RS Means 78<sup>th</sup> annual edition.

**Question:** I was wondering if you can differentiate the difference between the SRO’s vs Efficiency/Studios on the LIFT application?

**Answer:** The bedroom count of an SRO for NOFA purposes is 0.25 of a full bedroom and Efficiency/Studios is 0.5 of a full bedroom. As far as what we consider an Efficiency/Studio: a living space that has both its own food prep area (aka kitchenette) and its own bathroom that includes bathing facilities. An SRO unit does not have to have both, they can be shared with other tenants. Having only 1 of the two makes it a SRO unit.

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## **9% LIHTC NOFA:**

**Question:** For the pre-application, if a project is requesting more than 10% of the total 9% LIHTC annual allocation, do you need to submit a 4% proforma as part of the pre-application? Or is only with the full application?

**Answer:** Applicants are required to only complete the 4% LIHTC/tax-exempt bond pro forma not the full 4% LIHTC & Conduit Bonds Pre- Application when requesting more than ten percent (10%) of the State’s total annual LIHTC allocation. The NOFA page has been updated so you will only see the proforma.

**Question:** Do we need to complete the 4% LIHTC/tax exempt bond pro forma with the 9% LIHTC NOFA pre-application or wait until we submit the full 9% LIHTC NOFA application?

**Answer:** The 4% LIHTC/Bond pro forma will be due with the full application on April 30<sup>th</sup>. It would be helpful if you would submit an empty 4% Pro forma as a red flag that you intend to ask for more than 10% of the allocation.

**Question:** I’ve noticed an inconsistency in the pre-application and NOFA. In regards to GHAP, the preapplication states the max is 400k but the NOFA says 500k for balance of state. My intention is to request 500k in GHAP and I want to confirm that when I do so in the pre-application that it won’t cause any issues.

**Answer:** Including the balance of state figure for your gap funding will not cause an issue in your pre-application. The inconsistency has been noted and will be corrected.

**Question:** If a project is reapplying from last year, can you use the same project site review checklist that was accepted in last year's review?

**Answer:** If the project site review checklist was completed in the last year than it can be used again.

**Question:** I noticed that while payment of PSH Application Charges just need to be postmarked by the due date, the 9% NOFA says charges need to be paid by mail, and received by the due date.

**Answer:** We are in agreement that the 9% LIHTC application should also use the postmarked date for payments. Application charges must be received postmarked no later than April 30, 2021.

**Question:** Where is the MWESB Compliance Manual for the tax credit NOFA?

**Answer:** The MWESB Manual is located at: <https://www.oregon.gov/ohcs/development/Pages/mwesb-sdvbe-rental-housing.aspx> There you will find both the Manual and the MWESB Matrix.

**Question:** What if we have MWESB subcontractors that want to bid, but are not signed up, can we count them in meeting our goals?

**Answer:** In the MWESB Matrix, under the "categories by Trade" there is a column to list non-COBID subcontractors awarded construction contracts on the project.

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## **9% LIHTC Questions as of March 5:**

The **2021 9% LIHTC NOFA Training Webinar** was held March 3, 2021. The recording and power point slides are available on the 9% LIHTC NOFA webpage under Training and Guidance [here](#).

**Question:** Do we need to submit a request for an OHCS site visit prior to completing the Project Site Review Checklist for the preapplication for 9% credits?

**Answer:** No need to submit a request. OHCS is not conducting site visits due to COVID restrictions.

**Question:** Can you provide a definition of Permanent Supportive Housing? It is not included in the definitions provided in the 9% credits NOFA?

**Answer:** Permanent Supportive Housing, or PSH, is rental housing that is deeply affordable to households with extremely low incomes and provides comprehensive on-site tenancy support services. PSH must be designed and prioritized for households experiencing chronic homelessness, and units must be filled through a community's Coordinated Entry process.

**Question:** Is it possible to send an unlocked version of the Excel workbook – at least the sheets with narrative entry to allow copy and paste into a word document for editing? In the future, it would be appreciated if narrative portions were in document form, not within Excel.

**Answer:** The workbook is locked via an add-in tied to our database, and it does not allow as much granularity with what we lock/unlock. We did however ensure it was possible to copy/paste into the excel fields from a word document. With the new application we committed to keeping as much in one place for submission as possible.

## **Questions from 9% LIHTC Webinar:**

1. **Question:** Will all questions be incorporated into the FAQ?  
**Answer:** Yes, we've compiled the questions asked in the webinar and they will be included in the FAQ released on 3/12/2021.
2. **Question:** Since HTF isn't being offered in this NOFA, there is only 6 points available under the funding efficiency category of competitive scoring, correct?  
**Answer:** The 8 points are structured under the QAP. Given that HTF isn't offered in this NOFA, those points will not be applicable to anyone.
3. **Question:** Will applicants be able to receive our portfolio performance scores from OHCS prior to our submission of full app?  
**Answer:** No, given the time constraints we cannot release your score prior to application. We encourage applicants to connect with their asset manager and compliance staff to get a sense of their performance.
4. **Question:** The website link to the OHCS approved market analysts isn't working. Can the link be updated and included in the FAQ?  
**Answer:** We have included an updated link under the "more resources" section on the 9% NOFA webpage and the link can be found here:  
<https://www.oregon.gov/ohcs/development/Documents/admin/approved-market-analysts.pdf>
5. **Question:** Can TIF (Tax Increment Financing) funds be used for points instead of HOME in Metro projects? **Answer:** Yes, we would consider those funds.
6. **Question:** Since OR-MEP (Oregon Multifamily Energy Program) is moving toward a first come, first served, wait list application process, projects will be offered waitlist confirmation letter instead of reserved funding as in prior years. Will OHCS require applicants to include a OR-MEP waitlist confirmation letter with their applications? Is the letter sufficient to include OR-MEP rough estimates on the proforma uses section?  
**Answer:** Yes, please show this as a source even if only waitlisted. We are comfortable with a rough estimate for OR-MEP in your application. Please upload the documentation you receive from OR-MEP confirming your place on their waitlist and, when you receive it, any notification of funding they provide you. For questions about OR-MEP funding and processes, please connect with Dan Elliott, who oversees the program, at Dan.Elliott@oregon.gov.
7. **Question:** For scattered site portfolio projects where you've got projects across the state, how do you score those in different areas that maybe in rural and others in urban?  
**Answer:** We use the scoring criteria based on wherever the geographic majority of units are located. For example: in a scattered site there are 60 units in rural and 40 units in urban. The portfolio as a whole would be scored as a rural project. The project scoring would not take into consideration any urban scoring criteria for review.
8. **Question:** How do OAHTCs get layered into deals? How do they fit into the capital stack?

**Answer:** OAHTCs are awarded as a discount to the interest rate on permanent debt. Depending on the nature of your project this reduction to the interest rate would show up in your capital stack as direct equity from an investor willing to buy those tax credits, if you have a viable exemption to the pass-through rent reduction required in statute and are using the tax credits to preserve housing. If the project is not exempt from pass-through rent reduction, then that reduction in interest paid passed through in the form of rent reduction to the tenants.

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## **9% LIHTC Questions as of March 12:**

**Question:** Can applicants pair PSH capital funding with a 9% application?

**Answer:** PSH capital funds cannot be paired with other competitive funding sources such as 9% LIHTC or HOME. This is standard practice at OHCS since all OHCS fund offerings require that a project have balanced sources and uses to be eligible for funding. If we allowed a project to apply for more than one competitive offering at a time and it wasn't successful in all competitions needed for balanced project sources and uses, there would be a gap in financing, making the project ineligible for any OHCS funding that it had qualified for. Please note we have received the feedback that this is a barrier for projects that are not 100% PSH and we will explore what we can do in the future to make OHCS funding more inclusive to integrated projects.

Please note, the 9% NOFA allows applicants to request PSH Services Funding and PSH Rental Assistance (not PSH Capital Funding) as a part of their 9% application.

**Question:** Regarding a Preservation project for funding under the current OHCS 9% LIHTC NOFA, does the state of Oregon or OHCS require a property manager to live on-site for OHCS-funded projects over a certain size/unit count?

**Answer:** There is no requirement for a site manager to live on-site. It is highly recommended that serious thought be given to the potential need for an onsite presence for the benefit of the property. Some properties need staff residing onsite and others don't.

**Question:** For the PreApp form on the Development Team tab, am I understanding correctly that the exact name of the Applicant would be required on the Site Control Document?

**Answer:** In general, yes, the applicant and the name on the evidence of site control should be exactly the same. However, as stated on page 16 of the General Policies and Guidelines Manual, if the applicant purchases the property through a nominee, such as an LLC, the applicant must clearly explain and document how it controls the entity that controls the site.

**Question:** If the Co-Applicant is the sole member of the entity named on the Site Control Document is that sufficient for the PreApp?

**Answer:** Yes, acknowledging that the purpose of the site control document is to sort out who has the legal authority to commit the property owner to the proposed use of the land or preexisting building. So, they have to have a clearly defined plan to make sure they maintain site control with any changes that may occur to their entity structure after funding.

**Question:** Does the Applicant need to be the Company ultimately to receive tax credits?

**Answer:** No, eventually, the single-asset entity set up for the project will be the recipient of the credits.

**Question:** If the Applicant and the Co-Applicant are both members of the entity named on the Site Control Document, is that sufficient for the PreApp? How about for the final Application?

**Answer:** Yes, this would be sufficient. Again, the point is to establish and maintain site control.

**Question:** If there is an Applicant and a Co-Applicant, to which one does the 9% LIHTC Cap restricting Applicants to an average of 15% of annual tax credits over two sequential year's allocations get applied?

**Answer:** After research and discussion, I feel most comfortable saying that we would evaluate the applicant and co-applicant for their award amounts over the past two years as the QAP doesn't make the distinction between an applicant or co-applicant. Should this be the case, we would review the entity structure and make sure that we have a full picture of the situation before making a final decision.

**Question:** What is the definition of Sponsor versus Applicant?

**Answer:** The two are used interchangeably, sponsor is the organization or entity that applies for funding for a project from OHCS. Hence, making them also the applicant.

**Question:** Are preservation projects eligible to apply for the state basis boost regardless of QCT or DDA?

**Answer:** Referring to the HERA Basis Boost on p. 25 of the QAP where it states that OHCS has the authority to increase preservation projects with determined financial feasibility needs. We will make that eligibility decision after review of the application.

**Question:** The financial viability section states there are points if the most recent Audit is closed. If my organization as a fiscal year end of 12/31, would "most recent" audit be for the 2019 fiscal year?

**Answer:** Yes, if the 2019 is your most recent completed audit, we would accept it and consider it for points. If by April 30, a 2020 financial audit is completed and closed, then please provide it as an update.

**Question:** Do you want the 9% and 4% proformas sent in with the pre-applications?

**Answer:** We want the pre-app proforma provided through our website completed as well as the site review checklist. You would only need to provide a blank 4% pro forma at pre-application submission, if your project is requesting consideration for more than 10% of the total annual LIHTC allocation.

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## **9% LIHTC Questions as of March 19:**

**Question:** Can you clarify whether you mean that PSH services funds can be requested via the 9% application or that a PSH application for service funds only can be submitted alongside a 9% application?

**Answer:** PSH Services and Rental Assistance can be applied for via the 9% application. PSH Services funding and PSH Rental Assistance funding are two of the available funding sources that can be requested within the 9% application, along with GHAP, HDGP, and OAHTCs.

**Question:** On page 26 of 40 of the NOFA for 9% Preservation, it notes a DCR of 1.15. For how many years, does this requirement apply?

**Answer:** This is required for 20 years, or the term of the OAHTC loan, if less than 20 years.

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## **9% LIHTC Questions as of March 26:**

**Question:** The sponsor I am working with will be requesting OHCS rental assistance and OHA service resources in the 9% NOFA to serve permanent supportive housing units. These units will serve households earning no more than 30% AMI. Can you please confirm whether there are any affordability restrictions that will be tied to units in exchange for the granting of these resources? Specifically we are wondering if granting of these resources will require those specific units be held at a 30% AMI for a certain affordability period, or if units can be held at 60% for the LIHTC affordability period provided that the households are 0-30% AMI and are charged no more than 30% AMI rents.

**Answer:** The 9% PSH units, aka the 9% units utilizing PSH PBRA and Services funding, can be held at 60% AMI rents for the LIHTC affordability period provided that the households are 60% AMI or less (can be restricted to 30% , but doesn't have to be) and charged no more than 27% of the households' income.

**Question:** I see in the 9% application, and on the Budget Sources tab there is a place to input your PSH Fund amount. Is this where we would input our OHA services funding request? Is there a service budget that needs to be submitted to back up this request? Same question for the OHCS rental assistance resources. I don't see where this is requested formally (other than in the Rents and Income tab where we indicate the subsidy type in row "O".)

**Answer:** Only the capital sources should be listed in the budget sources tab. That said, please add the OHCS Rent Assistance and OHA services funding to the "project details" tab at row 75 under the PSH Fundamental section. The 9% NOFA does not specifically request a services budget, but you are of course welcome to submit one if it's completed.

**Question:** Why was a "4% Bond Pre-Application document" uploaded to my 9% application supplemental documents folder in Procorem? The Instructions tab of my 9% application workbook does ask that 9% projects submit a 4% LIHTC Version of Application (if applicable). What does this mean?

**Answer:** This document was uploaded in error. The workbook is referencing the requirement of projects to submit a 4% pro forma when requesting more than 10% of the total state allocation for 9% resources.

**Question:** On p. 10 section 3.1, the 9% NOFA says that a "NOFA Cover Sheet, submitted by due date and time" is required for threshold. Can you please explain what this is, where I can find it, and if you mean it must be uploaded to Procorem or mailed to OHCS?

**Answer:** The coversheet is a remnant from a former NOFA cycle. There is not an individual cover sheet that needs to be filled out. Relatedly, the former coversheet was a reference to the worksheets that have been integrated into the full application. Please make sure to complete all of the worksheets in the full application, including the light blue worksheets labeled: Applicant Agreement, Auth Accept, DEI Agreement, Board Resolution, Ownership Integrity, and Application Charge Transmittal.

**Question:** The narratives tab of the 9% excel application includes a question that references a “Resident Services Plan”. However, I can’t find any document called Resident Services Plan in the application, just a Resident Services Supplemental. I am assuming they are the same thing but just want to confirm.

**Answer:** You are assuming correctly. The prompt seeks to inspire concise and abbreviated response. However, the supplemental listed under “Resident Services\_LIHTC\_draft.doc” in the work center is where elaborations should be made.

**Question:** What is the deadline to submit FAQ questions for the 9% LIHTC application?

**Answer:** The deadline for 9% LIHTC NOFA questions is April 20<sup>th</sup>.

**Question:** Will OHCS be releasing/disclosing the number of other applicants who also intend on applying for 9% LIHTC in this NOFA? How many other organizations have submitted a pre-application for 9% credits?

**Answer:** The statistics of pre-applications are available on our website, here:

<https://www.oregon.gov/ohcs/development/Documents/nofa/2021/LIHTC9-2021/LIHTC9-NOFA-2021-4-Pre-app-Feedback.pdf>

**Question:** We have a Real Estate Owned Schedule that covers all the information in the attachment. Is it required to transfer the data to the attachment, or is it acceptable to submit our own schedule?

**Answer:** Feel free to utilize your own schedule as long as it contains all of the same data inputs as ours.

**Question:** On the Development Team Capacity Form question #1- should we include only the Applicant/Sponsor’s projects or can we include the Development Consultant’s projects as well?

**Answer:** Page 28 of the NOFA spells out that Development Consult experience will also be considered.

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## **9% LIHTC Questions as of April 2:**

**Question:** When will the 2021 9% LIHTC NOFA Applicant list be posted?

**Answer:** The applicants list for the 9% LIHTC NOFA 2021-4 will be posted by May 7<sup>th</sup>.

**Question:** I wanted to clarify if the AFHMP commitments and partnerships are to be detailed with the resident services plan in the RSP supplemental form. I don't see a separate form or area in the app to enter this information.

**Answer:** If partnerships are finalized, please include MOUs as an attachment to your resident services LIHTC draft. If not finalized, mention the collaboration in the body of the draft. The AFHMP is completed when the management packet is turned in, if your plan is used to create your resident services, please specify in the body of your resident services draft.

**Question:** The percentages for Site Types Under Control and Sites in a QCT on the Project Details page seem to be based on the total number of buildings the template has available in total rather than the actual number of buildings of the project. As an example, the Site Details table should reflect that 100%



of the rehabilitation sites are under control and 50% (1 of 2 sites) are in a QCT area. Is there something I'm missing that I should do to correct this?

**Answer:** The Site Details table you pointed out is a summary meant for user reference. Any discrepancy in this table won't have a negative impact on your application. That said, the cell formula is too complicated to be addressed. Please do your best to accurately fill out the Site & Building Acquisition Information table, above this one, since it feeds information into the summary.

**Question:** The 2021 9% LIHTC NOFA #2021-4 states that an applicant may apply for up to 20% of the total 9% LIHTC annual allocation in one year, with the caveat that a 4% LIHTC/tax exempt bond proforma must also be submitted. In reviewing the LIHTC supplemental document, there is a basis boost for projects in a DDA or QCT. Are we able to apply for more than \$2,000,000 in annual tax credits for a project located in both a DDA and QCT that has supporting eligible costs to make the Project financially feasible?

Project A Example:

Total Eligible Costs: \$25 million

Eligible Costs with Basis Boost: \$32,500,000

Project is eligible for \$2,925,000 in 9% Annual LIHTCs

**Answer:** No, you may not apply for more than 20% of the annual tax credits. Page 24 of the Qualified Allocation Plan specifies that no single "applicant may receive more than 20% of any annual tax credit allocation" including if they have requested it through applications for more than one project.

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### **9% LIHTC Questions as of April 9:**

**Question:** Do the Ownership entities (the Limited Partnership and General Partner) need to be formed prior to application?

**Answer:** No, the ownership entities don't need to be formed prior to the application.

**Question:** HUD has published updated Median Family Income (MFI)s for 2021. Can these rents be used in the application?

**Answer:** No, we are not accepting 2021 MFIs on this year 2021-4 9% LIHTC application.

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### **9% LIHTC Questions as of April 16:**

**Question:** The Project Details tab, Row 127 requests information on the Site & Building Acquisition information, which I assume pertain to the existing site and any buildings. However, there are some questions in columns AB thru AF that ask specific questions about "# of visitable units" and "# units

adaptable for the physically disabled”. Can you please confirm whether these questions still pertain to the EXISTING project (if applicable) or the PROPOSED project.

**Answer:** This section of questions would include all proposed and existing buildings. If that involves rehab or preservation it would be for the existing buildings, but we’d want to know what you plan to do with those buildings still. For new construction we’d want just the proposed buildings.

**Question:** In the past OHCS has asked that documents be kept in their original formatting. For example, the Relocation Plan is provided as a Word template, and the final submission should not be converted to PDF. Can you confirm if that is still the preference? The current 2021 9% NOFA Document Submission Requirements table does not provide any reference to Workcenter folders. That being the case I assume applicable documents, along with the OHCS Excel Application, would be uploaded to the file on Procorem named: “Application Submission (Finalized Application and Documents Only)”. Is that correct?

**Answer:** We would accept the documents in either word or PDF, please be sure to maintain the document name. Yes, please upload all finalized documents for the application to the “Application Submission (Finalized Application and Documents Only)” folder.

**Question:** The total number of units for our project is being reduced by construction constraints and USDA loan regulations. Will our application be penalized for deviating from the proforma in the preapplication?

**Answer:** It’s understood that there will be changes between the pre-app and application. There wouldn’t be any penalty for changes between these two steps.

## **Summary of Changes to 9% LIHTC Application Excel Workbook:**

Changes made between 4/14/2021-4/21/2021

| Sheet           | Cells  | Error   | Fix Summary   |
|-----------------|--|---|---|
| Project Summary | C32:C61                                      | Figure is rounding the showing the Studio units as one-bedroom units                                    | On projects with SRO or STU units the cells were had their formatting revised to include a decimal. |
| Project Details | Row 34                                       | Zip code is not formatted correctly   | The cells were deleted.   |
| Budget Uses     | F141, F146:F147, F154, F156, F165:F168, F181 | The formula incorporating the summing for the various totals was not including non-eligible basis items | Correct the formula to sum the total project costs, inclusive of non-basis column                   |

|                         |  |  |   |
|-------------------------|--|--|---|
| Budget Uses             | D219:F226                                | Inconsistencies in calculation with old proforma.  | Formulas were reverted to reflect closer to prior proforma calculations to alleviate confusion.                 |
| Operating Budget        | L21, L26, L34, L60, L70, L88, L100, L106 | There was an incorrect formula that had the incorrect numbers reflected in the specified categories. | Updated the formula to calculate properly.  |
| Operating Budget        | L38, L108                                | The categories were averaging instead of summing the relevant figures.                               | The formula was updated to reflect the correct summing for applicable figures.                                  |
| LIHTC Calc (Site Entry) | I21:J22                                  | Formula error causing summary tab to not pull correctly when site received basis boost.              | Made formula return 0 instead of a blank when not applicable.   |
| Scoring_9% NC&AR        | D46:D53                                  | County Data isn't populating causing an issue with self-scoring                                      | Updated Severity of Need data sheet to prior format allowing formula to function as before.                     |
| Scoring_9% NC&AR        | C138                                     | Doesn't show 9% Set-Aside pool options   | This was a cell for ease of reference, so we deleted rather than cause any confusion with an incorrect formula. |
| Scoring_9% Preservation | D117                                     | Points given through the formula are not reflecting current NOFA                                     | We have updated the formula to assure that the points as outlined in the NOFA are reflected.                    |
| Scoring_9% Preservation | D118                                     | Points given through the formula are not reflecting current NOFA                                     | We have updated the formula to assure that the points as outlined in the NOFA are reflected.                    |

We greatly appreciate all the feedback with the excel document application and want to acknowledge that some changes recommended by applicants weren't executed. Some of those recommended changes were either administratively burdensome or unnecessary as they did not impact scoring.

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**9% LIHTC Questions as of April 23:**

**Question:** Our 9% LIHTC Application Charge payments were sent in earlier this week. Would you be able to confirm receipt?

**Answer:** Upon receipt, our NOFA staff will be notified and a copy of the posted payment will be uploaded into the project's workcenter on Procorem.

**Question:** Under the Scoring\_9%\_ New Const & Acq Rehab Tab and the Affirmative Fair Housing Marketing section, one of the criteria is the "Analysis of underserved populations". We are wondering whether it is possible to earn this point if the analysis of underserved populations is not a part of the AFHMP and is instead independent analysis of the population the sponsor seeks to house.

**Answer:** Yes, this point would be possible through an independent analysis provided as a supplemental document to the AFHMP or MOUs.

**Question:** The Project Narrative requests a brief overview of 1,000 characters or less – do you mean words instead of characters?

**Answer:** We do mean 1,000 characters. We are asking for conscience elaborations on the content of the application.

**Question:** If we have a project requesting PSH rent subsidy and services funding, must we take the PSH path to earn the 5 points under the State Priorities scoring section? Or may we take the Family Sized Units path?

**Answer:** To confirm, a project can take the family sized path and still be requesting PSH rental subsidy and services funding.

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## **HOME For Preservation NOFA:**

**Question:** The HOME NOFA says charges need to be paid by mail, and received by the due date.

**Answer:** The HOME application should also use the postmarked date for payments. Application charges must be ~~received~~ postmarked no later than April 30, 2021.

**Question:** Can you apply for HOME Funds for New Construction projects?

**Answer:** The 2021 HOME NOFA prioritizes preservation of existing affordable housing projects, primarily those with rental subsidies, and is not taking applications for new construction projects.

**Question:** My understanding is that NOFA #2021-5, Affordable Rental Housing Preservation Projects with HOME is intended to be used to preserve existing affordable rental housing. Does that include giving projects that are over 20 years old a chance to do moderate rehab?

**Answer:** The 2021 HOME NOFA is intended to preserve affordable rental housing with a heavy scoring emphasis on projects that have the opportunity to preserve existing rental subsidies, as is reflected in the scoring priorities of the NOFA. The limited amount of HOME resources available for this NOFA requires OHCS to focus on this priority even as we recognize the need for affordable rental projects to

address much needed repair needs. HUD allows projects whose 20 year HOME affordability period has expired to receive an additional award of HOME resources. While an application could be submitted under the 2021 HOME NOFA for a previously funded HOME project that is close to, or has already passed the 20 year HOME affordability period, it will not score as competitively as a project that is proposing to preserve existing rental subsidies.

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## **HOME Questions as of March 5:**

The **2021 HOME NOFA Training Webinar** was held March 4, 2021. The recording and power point slides are available on the HOME NOFA webpage under Training and Guidance, [HERE](#).

## **Correction to HOME Preservation NOFA, Page 20:**

### **G. Federally Declared Wildfire Disaster Area Scoring (up to 5 points)**

- ~~1. Projects in jurisdictions which experienced the highest degree of housing loss due to wildfires (5 points)~~
- ~~2. Projects in jurisdictions neighboring those directly impacted by housing loss due to wildfires (3 points)~~
- ~~3. Projects in remaining areas of Disaster Area declared counties (2 points)~~

Up to five points will be attributed based on OHCS adopted scoring for areas impacted by the 2020 Wildfires. These points are scaled in relationship to the overall housing impact within the 8 Federally declared disaster area counties, focused on cities and Census Tracts as appropriate. Detail on these points and associated methodology can be found here:

<https://www.oregon.gov/ohcs/development/Documents/nofa/2021/FederallyDeclaredDisasterArea-PreferenceforNOFA.pdf>

### **H. Rural Priority Scoring (up to 5 points)**

Up to five points will be attributed based on OHCS adopted scoring for areas impacted by the 2020 Wildfires. These points are scaled in relationship to the overall housing impact within the 8 Federally declared disaster area counties, focused on cities and Census Tracts as appropriate. Detail on these points and associated methodology can be found here:

<https://www.oregon.gov/ohcs/development/Documents/nofa/2021/FederallyDeclaredDisasterArea-PreferenceforNOFA.pdf>

Up to five points will be awarded to Projects located in rural Balance of State areas as defined in the definition section of this NOFA. (5 points)

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## **HOME Questions as of April 16:**

**Question:** Will interested entities have to wait until 2022 for a new NOFA? How and where can I be notified of when new NOFAs are available?

**Answer:** Below is the link to sign up for OHCS news and announcements to make sure you're aware of future funding opportunities. We have not yet determined when the next HOME NOFA will be issued, but signing up at the link below is the best way to make sure you're up to date about funding announcements.

[Sign up for OHCS E-News](#)