

2022 NOFAs FAQs

Questions as of 04/29/2022

**** April 22nd is the last day to submit questions for the 9% LIHTC NOFA.**

April 8th was the last day to submit questions for the LIFT Rental, LIFT Homeownership, and PSH NOFAs.

***Technical Issues with the Excel Applications should be reported at the following link:**

<https://app.smartsheet.com/b/form/7d4e4feb141440c3a68bc2ae3d6b989f>

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General Questions

Question: If we don't have a confirmed General Contractor at the time of application, should we leave the section regarding the general contractor blank on the application, or input the name of the contractor who provided the estimate (knowing that it might ultimately be a different contractor)? And how should we answer the general contractor questions in the MWESB section?

Answer: You can leave the General Contractor section in the application blank. But please answer the General Contractor-related questions in the MWESB section from the perspective of what you will require of and look for in your GC for the project.

9% LIHTC NOFA:

Announcements:

1. An email was sent out notifying projects that have commercial space or are using the preservation self-scoring tab to please upload applications for update. If you have either of these specifics to your application, please upload your application or connect with Angela Parada, LIHTC Manager.
2. A second email was sent out to confirm that all applicants should be using 2021 census tract numbers.

Question: Is there any way to confirm our scores for the OHCS portfolio compliance and viability section of the application?

Answer: Our asset management team is working through the scoring of this section and we will publish as soon as it's available. We appreciate applicant patience as we do our best to get scores prepared.

Question: The application now includes an income to expense ratio, is there some kind of metric that needs to be hit?

Answer: No, there are no metrics or app requirements for this ratio. Its included in the application for data collection.

Question: Cell A35 of the Scoring_9% NewConst&AcqRehab worksheet tab shows the dropdown options for points on the Wildfire Disaster Area (i.e. 1, 3, & 5), but it says cell is protected and a password is required.

Answer: It was under advisement of leadership that the wildfire self-scoring was disabled due to continuous errors in self use in the last cycle. Every project will have their census tract confirmed this year for wildfire and location scoring.

Question: The sponsor is targeting two different special needs populations. Together the number of units "set aside" for the two populations equals 25% or greater of the total number of units. However, the scoring tab only allows us to choose one population from the drop-down menu, resulting in less points than what should be earned. Please advise how the sponsor should proceed.

Answer: Please select one of the special populations and assign all units designated for both to the one for the purposes of this scoring criteria, and we'll have the project details tab to see indications of the split between the two.

Question: In regards to PSH - Should the Tenant-Paid Rent assumption (column K) be \$0? Double checking, we see this is what the model indicates.

Answer: Yes.

Question: In regards to PSH - Should the Tenant Paid Utilities assumption (column L) be \$0?

Answer: Yes.

Question: In regards to PSH - Should the Project Based Rental Subsidy Amount (column Q) be set to a 60% Rent for the applicable bedroom size (aka gross rent), or 60% Rent less Utility Allowance (aka net rent)?

Answer: 60% Rent for bedroom size, there is no utility allowance in PSH.

Question: In regards to PSH - Is the expectation the building pay utilities for any unit with OHCS PSH Rent Assistance?

Answer: Correct.

Question: In regards to PSH rent, Is the expectation the tenant pays no rent or a defined portion of their income in rent? If they do pay rent, is the contracted rent subsidy payment to the owner reduced by the total tenant payment?

Answer: PSH households will pay 27% of their income, which is subtracted from the contracted rent (60% AMI LIHTC rent amount).

Question: Since the new submission deadline is 5-6-22, does the application fee also need to be post marked by that day? If so, p. 10 of the NOFA Version 1.2 was not updated to reflect this or to reflect the new submission deadline.

Answer: The post mark date for application transmittal and payment hasn't changed – please get those post marked by 4/29.

End of new Questions

Question: On the NOFA, it says: *Electronic Signature: An electronic signature, in the case of the Pre-app and Full Application, is typing your name into the signature field and submitting the application. With such signature, Applicant attests that it will meet and comply with all the requirements and conditions of the NOFA, Pre-application, and Full Application.* Does that mean we do not have to get inked signatures for the Applicant Agreement, Auth Accept, DEI Agreement, and Ownership Integrity?

Answer: Submissions are binding on our part when an authorized individual types in their name. If this is insufficient for your organization, please print and sign and provide an PDF of the wet or digitally signed hard copies.

Question: On the Auth Accept form, Items #2 and #3 have places for two signatures but only one title?

Answer: The word "date" should say "title" for both #2 and #3.

Question: On the LIHTC Supplemental, are we supposed to add the ROFR language to the following text box?

Answer: Please disregard the yellow highlighted language. It was accidentally left in the document.

Question: Is it recommended to include the reports that we download from the census website in order to fill in the worksheets for the AFHMP as part of the AFHMP PDF?

Answer: You are welcome to supplement the AFHMP, but the DRAFT document is the only thing that is required.

Question: How do we find the OHCS deal number? Is there a place where applicants can look for those? Also, the check has already been sent. Is it ok that it was not sent with a deal #, just a project name and NOFA #?

Answer: The deal numbers would normally be in the work center title, but there weren't this go round. Staff is prepared to fill those in. Yes, it's okay to have sent in payment with transmittal form— as long as the project name and NOFA are indicated.

Question: On page 53 of the "*State of Oregon Qualified Allocation Plan For Low Income Housing Tax Credits (1/20/2021)*" It states..."as long as the developer fee does not exceed OHCS's approved maximum developer fee." What is the approved maximum developer fee? Or where can we locate that information?

Answer: Maximum developer fee information is located in the developer fee tab of the 9% Application excel workbook. Additionally, the QAP on page 57 has the high level elements of maximum developer fee.

Question: I see in the LIFT FAQ that the Development Team Capacity (word doc) is not necessary and the preference is for this information to be input in the workbook. Does this guidance hold for 9% LIHTC applications, too? The Development Team Capacity for 9% LIHTC is same name but different content – it has additional tables and information not requested in the workbook.

Answer: For the 9% application, please fill out both the word doc and the narratives section of the excel workbook.

Question: The 4/8/2022 FAQs talk about a revision to the NOFA pages 30 and 38. Where can we get the updated NOFA 2022-5 v. (1.2)? Does the 4/8/2022 updated application address all of the issues described on page 3 of 4-8 FAQs, or is another application update coming?

Answer: This is the updated NOFA:

<https://www.oregon.gov/ohcs/development/Documents/nofa/2022/2022-5-LIHTC9-NOFA-v1.2.pdf>.

The app updated completed addresses the list in the FAQ. We don't anticipate another update.

Question: The Federal Preferences section was hidden on the Project Details tab. Was that done on purpose? Should we keep it hidden for the submission? If it was not hidden on purpose, can you please provide a definition of special needs?

Answer: This is hidden, because it's not required to be filled out. The self-scoring tab asks explicitly about the Federal Preferences points. As for special populations, the table in your question below spells out these populations. The NOFA also offers the specific regarding special needs targets on page 21.

Question: On the population served set aside Goal table, if one unit will be serving multiple populations, should we include that unit in the count for each population or just choose one population type per unit so that the total number of units adds up to the total units in the project? For example, one of the projects that we're working on has 40 units, 10 of them serve both families and foster youth, so we could potentially mark 10 under both populations, but then the total units will add up to more than 40.

Answer: Please only reference one population per unit set-aside. The doubling up of units skews the reality of available units at the project for special populations.

Question: We would like guidance on the maximum escalation for the development budget. The only reference that we could find is in the GPGM it says 3%. The workbook limits escalation to 10%. Can we use an escalation of more than 3% if it is justified?

Answer: This year we are allowing escalation reflected in "Construction Cost SOV" tab at F168 up to 10% to allow for a more realistic picture of project costs.

Question: For Utility Allowance Requirements, we plan to use option 1 (Public Housing Authority Utility Allowance). This section says, "These forms will be an attachment to the application using forms provided." We didn't see where these forms are provided. Can you please give more guidance about what should be submitted for this?

Answer: The directions in the NOFA are incorrect, apologies. Please submit utility allowance "calculation/methodology/evidence" documentation as applicable to the intended UA methodology and subsidy sources as a separate document to the work center's "Application Submission (Finalized Application and Documents Only)" folder.

Question: For Have the "portfolio performance scores" posted somewhere?

Answer: These scores have not yet been released.

Question: Please confirm that we should be using 2021 rents on the 9% NOFA application this year?

Answer: Yes, please use 2021 rents.

Question: How do you submit your documentation for energy efficiency beyond CDM point?

Answer: The NOFA asks you to please provide evidence consistent of your proposed project's energy efficiency beyond CDM as a supplemental to your application. Upload documentation of this work to your Workcenter into the "Application Submission (Finalized Application and documents only)" folder.

Question: In the Narratives tab under the Development Team Capacity at Question 3 seems to be a repeat of earlier questions – can you confirm what you are looking for?

Answer: Different scoring teams review different components of the application – please answer these question consistently between individual prompts.

Question: If this is not the first time, we are submitting a 9% application for a project, do all attachments need to be dated 2022 or can we use documents from a previous application?

Answer: Please have all documents dated and labelled for this NOFA. That said, it's at the applicant's discretion to update supplementals/evidence/documentation as makes sense. If you have questions regarding specific documents. Let us know via the MFNOFA inbox.

Question: Do we need to fill out and upload the checklists (for example the Administrative Requirements Checklist)?

Answer: Checklists aren't required – they are there for convenience.

Question: Can we turn the word documents into PDFs for submission?

Answer: It would be awesome to get items turned in as PDFs, but we didn't specify this requirement – so it's up to applicants. Please follow the naming conventions prescribed in the instructions of the excel application.

Question: Do we upload each item separately as individual items into the submission folder?

Answer: Yes, please upload each item individually.

Question: On the New Construction scoring sheet, under Readiness to Proceed, it says "total of 6 points available," But even though we answer "yes" on all four cells, the sheet displays only five points, not six. Please explain?

Answer: There are a total of 6 points allotted to this category – achievable through a total of 5 or 4 total points (committed or pending commitment on funding). The 6 point total is reflective of the language in the QAP. The language in *this* NOFA wouldn't allow both the two points for funding committed and the one point for funding pending. You should be able to generate 5 points in this section on the self-score tab or 3 points and an explanation of "pending funding" which would result in either zero, one, or two points depending on scorer's assessment.

*** 2022-5 9% LIHTC NOFA is extending the due date of the application through an issuance of a revised NOFA. The Application is due on May 6, 2022 at 4pm. Review NOFA 2022-5 v. (1.2) for confirmation. The FAQ deadline is unchanged; all questions are due by 4/22/2022.**

Please Note: An additional revision to the updated NOFA is reviewable on pages 30 and 38. It relates to development history. We have elected to decline possible point loss via this points category. An update to the full application will be available soon, the extension to the due date is to allow for the transference of inputs into the new application. The new application will address:

- the transmittal form issue
- unlock the deal number space
- self-scoring updates consistent with the NOFA (location and project readiness)
- update to the basis calculation when project has commercial space
- corrected location-based scoring in formula for Location Need Severity section.
- corrected basis boost on additional sites beyond site A in the LIHTC Calc (site entry) tab.

Question: We had a question about interpreting the statement below re: a Phase 1 Environmental. The statement in pre-app reads:

If “yes” submit only the executive summary and any recommendations. A Phase I, no older than 6 months prior to the NOFA due date and conducted in accordance with ASTM E.1527-13, will be required as a reservation condition if the project is selected for funding.

If the current Phase 1 is older than 6 months, is an update needed before the 9% application is submitted or can we wait to learn if awarded?

Answer: The preference is that the environmental meet the requirement prior to submission, but if for some reason this isn’t possible we would accept an application without the phase 1 - the reservation and conditions letter after funding recommendation would indicate the timeline for getting that completed.

Question: Can 100% of the HOME and GAP resources (as grants) be disbursed at closing, or is some holdback required until completion? If a holdback applies, what percentage and until when?

Answer: For HOME cannot be disbursed at closing, below is language from the HOME Program Manual:

Pre-development Costs Incurred

HOME loan funds can be used for eligible HOME costs incurred after the loan documents have been fully executed (i.e., signed by both the HOME recipient and OHCS) and filed with the appropriate County Recorder’s Office. The only exception is when OHCS pre-approves the use of HOME funds for some eligible pre-development costs. These costs must have been incurred no earlier than 6 months before the application for HOME funding. Reimbursement for eligible pre-development costs will occur after execution of the HOME loan documents.

For GHAP funding, we do require a 10% holdback. It’s normally the largest source, unless it has HOME or HTF, in which case the holdback is on one or both of those sources. We have that written in the RCL. Not sure if it’s also in the manual.

Question: I noted that there were no pre-applications for the tribal land set aside. I reviewed the NOFA to determine what happens to those unused credits, but I did not find an answer. What is the answer?

Answer: The specifics about the remainder of the tribal set-aside is on page 6 of the NOFA.

Question: In the balance of state rural set aside, three of the six requested more annual LIHTC than is available in the set aside. Are they out of the competition? Or if they submit an application that reduces the request below the set aside amount, are they still in the competition.

Answer: The reservation process starts on page 8 of the NOFA.

Question: If there are supplemental attachments to the AFHMP, are those considered for scoring purposes?

Answer: Yes, we would consider the AFHMP, an MOU, or explanation of commitments as outlined in the NOFA (p.24).

Question: Are we able to copy and paste from Word into the NOFA Excel spreadsheet? Can we use text boxes? I'm asking based on varied guidance from past years.

Answer: You can copy paste text into the excel (consistent with the character count allowed) – please do not attempt to insert text boxes into the excel application.

Question: On the Narratives tab of the spreadsheet, do the narratives need to stay within the boxes provided or can they be longer? For example, will the scoring teams scroll down to read through the text that goes after the end of the text box?

Answer: The boxes are not necessarily the size of the total character count allowed. They will be scrolled through and reviewed.

Question: Is a Revitalization Plan the same as a Comprehensive Plan per OHCS? There does not seem to be a definition of a Revitalization Plan in the NOFA or QAP.

Answer: The revitalization plan can be a part of the comprehensive plan – the QAP specifies at page 34 that the revitalization plan demonstrates investment of public resources into capital improvements of residential, commercial, or infrastructure.

Question: On the Scoring - 9% New Const & Acq Rehab tab, there appears to only be 1-5 points in the pull down for Vulnerable Gentrification Areas, even though this category has 8 points max?

Answer: We are in the process of creating a fix for the scoring in the vulnerable to gentrification and other mismatch scoring in this section.

Question: For the Federal Tax ID # on the Development Team tab, there are a few cells that will not allow me to enter the ID without a dash. Is it okay to leave the dash where the cell will not allow me to remove it?

Answer: Yes, if the cell is formatted to include the dash than leave it.

Question: On the Rents and Incomes tab of the NOFA, if the unit is LIHTC, HOME, and project based vouchers, what category should we select under the Programs tab since there is not a tab that includes both LIHTC and HOME?

Answer: A unit should be designated under a single program. Please select the most restrictive program rent to comply with the applicable funding requirements. Vouchers have their own input between Q18 and S18.

Question: Does OHCS provide a list of approved engineering firms that provide Energy Consumption Models for UA calculations? Will OHCS accept an Energy Consumption Model even though most applications don't? If so, do you know of any firms that have performed one in the past that would be a good starting place to ask? If not, is there any guidelines or requirements for the model I can provide to an engineer to prepare one?

Answer: Most of the LIHTC applications we have seen use the Public Housing Authority model, as the standard model. Although OHCS does not have a list of approved engineering firms, we do have a list of

approved utility allowance calculators on our website: <https://www.oregon.gov/ohcs/compliance-monitoring/Documents/memos/Approved-UA-Calculators.pdf>.

Question: On an occupied rehabilitation project the tenant survey document is required for the application. There are some concerns that we are putting names and income numbers on document that may be public. Does the agency have some protections to keep this information secure? If we indicate the % of AMI, can we leave the income number blank – particularly if the project is 100% rent assisted?

Answer: Please include ALL data requested on the tenant survey forms. Protections are provided through ORS 192.355(24), which states the following are exempted for public records release:

- (a) Personal and corporate financial statements and information, including tax returns.
- (b) Credit reports.
- (c) Project appraisals, excluding appraisals obtained in the course of transactions involving an interest in real estate that is acquired, leased, rented, exchanged, transferred or otherwise disposed of as part of the project, but only after the transactions have closed and are concluded.
- (d) Market studies and analyses.
- (e) Articles of incorporation, partnership agreements and operating agreements.
- (f) Commitment letters.
- (g) Project pro forma statements.
- (h) Project cost certifications and cost data.
- (i) Audits.
- (j) Project tenant correspondence.
- (k) Personal information about a tenant.
- (L) Housing assistance payments.

Question: Has OHCS published a list of the pre-applicants for 9% NOFA 2022-5 yet? I am not finding one on the website.

Answer: The pre-app stats were posted Friday afternoon. Here is the link:

<https://www.oregon.gov/ohcs/development/Documents/nofa/2022/2022-5-Pre-App-Stats-and-Feedback.pdf>

Question: Where in the application do we demonstrate how many units (and which units) are HOME units based on the amount of HOME funds requested?

Answer: Anticipated HOME designated units should be identified on a appropriately completed “Rents and Incomes” tab in the excel application.

Question: What kind of evidence, if any, is required for intent to allow tenant ownership in the future?

Answer: We’d want to see evidence that IRC §42(i) (7) (A) and (B) relating to eventual tenant ownership has been discussed between all members of the anticipated or formed partnership. Not only discussed, but anticipated language/plans related to its impact on Year 15 and tenant readiness.

Question: Tab Scoring_9% NewConst & AcqRehab, cells E105 to E109 contain the prompt "[describe]". These topics are covered in detail on the Narratives Tab. What are you looking for in cells E105 to E109?

Answer: The describe space allows for a succinct description of the intended AFHMP activities elaborated on in other sections/supplementals of the application.

Question: Can you share the numerical score of the lowest scoring LIHTC 9% application that received a reservation of letter in the 2021 round? Based upon the changes from the 2021 NOFA to the 2022 NOFA do you expect that generally the numerical scores will be higher, lower, or close to the same as the 2021 scores?

Answer: OHCS cannot speculate about scoring mid-cycle for 2022 NOFAs. As for 2021 – we’ve only disclosed exact scores to applicants that participated. We do release a range, when requested specific to a set-aside.

Question: Please confirm that I am uploading all items to the correct folders? For example, on page 16 of the NOFA for the Federal Resources Status item it says:

This information should be provided in the notes on the Budget Sources worksheet in the Application; any evidence should be included in the Threshold Submission Folder and named "Federal Resources Evidence"

- It appears that the Federal Resources Status is the only item that needs to be uploaded to the Threshold Submission Folder, which I am assuming is the folder entitled "Threshold Instructions and Checklists"?

Answer: The Items in the folder "Threshold Instructions and Checklist" will have the instructions needed for Threshold Items.

- Do none of the other Threshold items need to be uploaded to this folder?

Answer: Correct, Uploads should **ONLY** go into the "Application Submission" (Finalized Application and Documents Only).

- Is this "Threshold Instructions and Checklists" folder the same as the "Threshold Submission folder"?

Answer: No, the Threshold Submissions folder references the "Application Submission (Finalized Application and Documents Only)" folder.

- Should we be uploading all final items to the "Application Submission" folder for ease of finding all the items?

Answer: Yes, please upload **all** final items into the "Application Submission" folder.

Question: Is OHCS expecting to see a fully executed LOI from the investor for the application or simply language incorporated into a standard application letter?

Answer: Please have the anticipated investor reference the ROFR language in the documentation of intent. It doesn't have to be a full LOI – we know this is fairly early on in the process.

Question: If we are requesting PSH funds in the 9% NOFA, do we need to complete the PSH fundamentals section or is that just for the PSH NOFA? And what would we select in the dropdown in the PSH Fundamentals section?

Answer: Yes, if you are requesting PSH Services and/or Rental Assistance via the 9% NOFA you must complete the PSH Fundamentals section. Please select “Rent Assistance/Services Only”.

Question: Can we request PSH Development Capital in the 9% NOFA?

Answer: No, only PSH Rental Assistance and Services funding can be requested along with 9%.

Question: Where can we learn more about the PSH Resources?

Answer:

[Oregon Housing and Community Services : Permanent Supportive Housing : Housing Development : State of Oregon](#)

[PSH-Services-Framework-2.0.pdf \(oregon.gov\)](#)

[PSH-Rent-Assistance-Framework-2.0.pdf \(oregon.gov\)](#)

Question: The application includes a federal preference for “Housing Authority commitment to market units to wait list”. Can you please clarify if there is a template or required language to demonstrate this commitment?

Answer: There isn’t a template for this point category. Typically a full point is awarded to any documentation coming from the PHA referring the proposed project and confirming their commitment to market the units.

Question: The NOFA says Location Need Severity is up to 4 points – the scoring tab says max of 7 points (in cell B41) - can you confirm which it is?

Answer: The app incorrectly references the last cycle’s 7 points – there are, as the NOFA indicates 4 points available for this category.

Question: If a sponsor does not have an OHCS Portfolio does it just score 0/5 in the OHCS Portfolio Compliance and Viability Criteria section?

Answer: If there is no project in the OHCS portfolio than points would be awarded assessing the applicant provided “performance letter.” We would likely award full points unless there is the disclosing of non-compliance in the letter.

Question: On page 8 of the 9% NOFA, it states that, No Applicant may receive more than 20% of the total 9% allocation in any one year. There is no clear definition of applicant, but we assume this means the long-term owner/sponsor of the project. If we are a 3rd party developer assisting a long-term owner with no ownership stake, we believe we are treated as a consultant and not an applicant for the purposes of this calculation. We are working on two applications this year, one as owner for ourselves and one as a development consultant for a client. We want to confirm we will not negatively impact our client in that deal and can submit both applications and they will be treated separately for the calculation of LIHTCs per Applicant. Can OHCS please confirm?

Answer: Current policy applies to applicants (inclusive of co-applicants) - both are impacted by the tax credit cap which is applicable over two years. If you are in your client’s application as a co-applicant and the funding of both projects would violate the 20% cap than we would be required per the QAP to fund the project that was higher scoring, if ranking permits. If you are in your client’s application as a

consultant, than the you and the client would have your tax credit caps calculated separately. Relatedly, if you are being paid out of the developer fee than you should list yourself as a co-applicant on your client's application.

Question: In our project we will be co-owners/co-sponsors with a Qualified Culturally Specific Organization/Developer. On page 7 of the NOFA it notes that 10% of the annual allocation is set aside for Culturally Specific Organizations. Our partner meets the definition outlined in the NOFA and the QAP but what isn't clear is are there any co-owner/co-sponsor requirements to meet this set aside? For example, do they have to own a certain percentage, etc?

Answer: The post webinar FAQ requires that "Culturally Specific Organizations are required to be applicants/sponsor organizations in order to qualify for the set-aside." This is in contrast to a project where the Qualifying CSO is listed as a non-descript partner." Given the definition of Sponsor in this NOFA identifies both applicants and co-applicants of a proposed or funded project. We would allow request of the set-aside for a project where the co-applicant meets the definition. The additional requirements for accessing this resource are listed in the "Organizational Documents Instructions." Located in subfolder "Administrative Review" in your Workcenter."

Question: What are the HOME rent restrictions in the 9% LIHTC NOFA?

Answer: The State of Oregon Consolidated Plan has determined that housing with rents affordable to tenants with very low- incomes is a priority need in the Balance of State. OHCS typically requires HOME funded Projects to restrict rents and tenant incomes to 50% (Low-HOME) of the area median income for the designated HOME- assisted units. The most recent HUD rent and income limits (HUD has not yet released the 2022 HOME rent or income limits) can be found here: <https://www.oregon.gov/ohcs/compliance-monitoring/Pages/rent-income-limits.aspx>

Question: What is the scale for HOME points – i.e. is it possible to get 1 (one) point for this category?

Answer: The HOME category, where applicable, gives 2 (two) points for any funding committed or requested and 0 (zero) for no HOME. There is **no** way to get 1 (one) point.

Question: I am working on a new construction project in Astoria. The owner is the Northwest Oregon Housing Authority and Community Development Partners will be the fee developer only and will have no ownership stake. How should I best represent this on the pre-app? Co-applicant/Co-developer or Consultant? Our fee will come out of the developer fee so it will not be a separate cost.

Answer: If your fee will be paid out of developer fee, please designate CDP as a co-applicant. If in the application the team intends to request for allocation under the non-profit set aside – please be aware the code requirement for Material Participation of Qualified Nonprofit Organizations – If the taxpayer received an allocation under IRC §42(h)(5), a set-aside of credit designated for projects owned by qualified nonprofit organizations, then the qualified nonprofit organization must materially participate in both the **development and operation** of the project throughout the 15-year compliance period.

Question: For the 2022-5 LIHTC NOFA I'd like to just confirm the intent that the HOME funds are only for the "balance of state" per the webinar materials. It does not state so in the NOFA materials.

Answer: Yes, OHCS HOME funds are **only** eligible for recommended award in the “balance of state.” Looks like you’ve found a program requirement of HOME not clearly articulated in the NOFA. There are a number of entitlement communities in Oregon that receive their own allocation of HOME funds, OHCS administers the HOME funds for the remaining balance of the state. Hence, “balance of state.” We split our LIHTC geographic set-aside into Metro/Non-Metro PJ (HOME funds available through a local HUD HOME Participating Jurisdiction) and Balance of State, where OHCS is the applicable participating jurisdiction. I’ve included here for your convenience the contact list for HUD HOME in Oregon.

Name of PJ	Jurisdiction	Contact Name	Contact email
Salem	City of Salem	Shelly Ehenger	sehenger@cityofsalem.net
Clackamas	Clackamas County	Paula Anderson	panderson@clackamas.us
Marion County	Marion County	Tim Glisson	tglisson@co.marion.or.us
Multnomah County Consortium	City of Portland	Leslie Goodlow	leslie.goodlow@portlandoregon.gov
	City of Gresham	Rachel Nehse	Rachel.Nehse@GreshamOregon.gov
	City of Gresham	Ashley Miller	Ashley.miller@greshamOregon.gov
Eugene Consortium	City of Eugene	Ellen Meyi-Galloway	Ellen.E.Meyi-Galloway@ci.eugene.or.us
	City of Springfield	Erin Fifield	efifield@springfield-or.gov
Washington County Consortium	Washington County	Ann Hawkins	Ann_Hawkins@co.washington.or.us
	Washington County	Lauren Thomas	lauren_thomas@co.washington.or.us
	City of Hillsboro	Omar Martinez	Omar.Martinez@hillsboro-oregon.gov
	City of Beaverton	Kathy Peoples	kpeoples@beavertonoregon.gov
	City of Tigard	Schuyler Warren	SchuylerW@tigard-or.gov
Oregon Balance of State	State of Oregon	Andrea Matthiessen	andrea.matthiessen@oregon.gov

Question: For the PSH funding that is available, would the same rules apply as the PSH NOFA 2022-4?

- PBRA subsidy payments will pay up to 60% MFI rents
- PBRA administrative fee payments of \$60 per unit per each month occupied
- PBRA 15 year contract term
- PSH services capped at \$10,000 per unit per year

Answer: Yes, the rules for PSH Services and Rental Assistance are the same as in the PSH NOFA.

Question: If an agency has not participated in the Oregon Supportive Housing Institute the agency is still able to apply for funding as long as the agency will participate in the next institute.

Answer: Correct, your team does not need to have already completed the Institute to be eligible to request PSH resources through the 9% NOFA. If you are awarded, you will be required to attend the next Institute.

Question: PSH PBRA units can be restricted at 60% MFI for the REUA

Answer: Yes, PSH PBRA units can be restricted at 60% AMI for the REUA.

Question: In the OHCS template for the REO Schedule, there is a column where we need to list the LTV for each property. We would like to know if you are requesting the LTV at time of underwriting or if you would prefer a current LTV using the principal balance of the loan-to-date and the fair market value. Can

you please clarify which of those two options we should use for this column?

Answer: Please utilize current LTV values for this column.

Question: I have an established REO Schedule. It lists the book value of the real estate holdings and does not use the calculation represented on the OHCS REO format (NOI). The property lists include more than 50 holdings. Can you accept the REO in their format even if it deviates slightly from yours?

Answer: A personalized format is fine for the REO schedule – as long as all components of the REO required in the OHCS format are included in the submission.

Question: One of the scoring criteria is that "up to 4 points" if serving special populations with 10-25% of units. Do you need 20-25% for four points? What do you need for 3, 2, or 1?

Answer: This information is detailed in the full application, but in advance of its release; the scale for points is: 10% - 14% = 1 point; 15% - 19% = 2 points; 20% - 24% = 3 points; 25% or greater = 4 points.

Question: The NOFA and the preapplication also state that \$1,000,000 is the *minimum* HOME amount. Is that correct?

Answer: Correct, the \$1M HOME requirement is a minimum.

Question: Are the costs of the "HOME" units still eligible costs for 9%?

Answer: There are rules regarding eligible costs for both LIHTC and HOME funds. Cost allocation should be consistent with these rules. Typically, HOME is used as a gap financing tool in LIHTC deals. This is an important consideration given the obligation of both programs Subsidy Layering Review. As such, LIHTC units should fund LIHTC units, but HOME may have matching restriction that allow for cost allocations that overlap but are only assigned to one program. More specifically, in the HOME Subsidy Layering Review, OHCS would want to see that:

- a) HOME is only paying for eligible costs, b) HOME is only being used for HOME assisted units, and c) HOME is not being used to pay for units that don't have a LIHTC gap.

Question: Does OHCS make the final decision on HOME funds for a project in Florence? I believe that only the City of Eugene and City of Springfield, not Lane County, is a PJ on HOME, correct?

Answer: A project in Florence would indeed only be eligible to receive HOME funding from OHCS as the "balance of state" PJ.

Question: Could you clarify the 95% limitation on OAHTCs? Does this mean that 5% of the total perm loan is at full interest rate, and 95% of the loan would receive interest rate reduction? From the NOFA: "4. There is a cap of 95% of permanent loan debt per project for OAHTC funding in this NOFA. There is NOT a total dollar amount cap." What does the 95% cap apply to?

Answer: The requested amount of OAHTCs only sets the cap on potential OAHTCs. The actual lender credits allowable is calculated by the interest reduction amortized over the term of the loan over the term of credit capture period; post payments that credit is available to the lender for the losses in those payment reductions. The entire loan is subject to the interest rate reduction no more than 4% and no less than .5%, credits can be taken over a max of 20 years potentially 10 years. The 95% cap applies to the total amount of OAHTC that can be requested in the NOFA application.

Question: Is PSH project-based vouchers and operating subsidy part of the 2022 9% LIHTC NOFA offering?

Answer: Yes, that is correct. The PSH rental assistance and services funding is available through the 9% NOFA and there is no cap on how many PSH units a project can request for rental assistance.

Question: Can you direct me to the spreadsheets summarizing the "winner" projects under the 9% 2021 NOFA and the LIFT Rental 2021 NOFA?

Answer: You can find all of the past NOFA Recipients on our webpage here:

<https://www.oregon.gov/ohcs/development/Pages/applicants-developments.aspx>

Please note: Updated 9% LIHTC NOFA 1.1 released 2/25/2021

Question: Is the application fee for the 9% application \$3,500 or \$5,000?

Answer: The 9% LIHTC NOFA #2022-5 application fee is \$3,500. This information can be found on the [OHCS List of Fees and Charges](#) on our website, [here](#).

Question: When will 9% awards be announced?

Answer: The 9% LIHTC NOFA recommendations for funding are scheduled to go to the August 5th Housing Stability Council meeting. The list of recipients will be published soon after.

Question: When entering the OAHTC requested amount, do you want the dollar amount of the loan that will use OAHTC or the dollar amount of the tax credits?

Answer: Please enter the dollar amount of the expected permanent debt loan representing up to, but not more than 95% of the total loan amount.

Question: The NOFA (page 8) says the maximum GAP amounts are \$400,000 and \$500,000; but the last tab of the pre-application, cell 27E says \$500,000 and \$600,000. Which is correct?

Answer: The NOFA will be updated to reflect the correct amounts of \$500,000 for projects in Metro and Non-Metro PJs and \$600,000 for Rural and Urban Balance of State projects.

Question: The NOFA says there are 93 scoring points, but with the 2 points for National Housing Trust Fund (HTF) eliminated, isn't the maximum now 91?

Answer: The maximum attainable points is 91. The 93 point max is reflection of the point categories required in the QAP. No applications will be awarded this points associated with HTF – and will be given a zero for that category to all applications.

Question: What are the HOME program per unit subsidy limits for rental housing development units of varying bedrooms?

Answer:

HOME Maximum Per-unit Subsidy Limits for Oregon and Idaho

Bedrooms	Section 234 Basic (Elevator-type) Limit ^a	High Cost Percentage ^b	HOME Maximum Per-unit Subsidy Limit
0	\$ 63,881	240%	\$ 153,314
1	\$ 73,230	240%	\$ 175,752
2	\$ 89,049	240%	\$ 213,717
3	\$ 115,201	240%	\$ 276,482
4+	\$ 126,454	240%	\$ 303,489

^a "Annual Indexing of Basic Statutory Mortgage Limits for Multifamily Housing Programs," 86 FR 172 (9/9/2021), 50554.

^b The Base Percentages for High Cost Areas reported in HUD Mortgagee Letter 2021-22 (9/14/2021) are limited to 240% by the National Affordable Housing Act of 1990 (NAHA) and HOME implementing regulations at 24 CFR 92.250(a). For more information, see Notice CPD-15-03 or HOMEfires, Vol. 12 No. 1.)

Wildfire Direct:

Question: Are we still allowed to apply for Wildfire Direct awards or would we have needed to submit a preapplication by 2/18?

Answer: Yes, you can still apply for Wildfire Direct funds, the preapplication deadline was for the competitive LIFT funds. The wildfire direct funds are first come, first reviewed. We publish the various wildfire direct asks on the LIFT NOFA webpages each Friday so interested applicants can see what has been requested previously.

Question: Can we request AWHTC or 4% LIHTC with LIFT Wildfire Direct funds?

Answer: Per the NOFA, Wildfire Direct funds are only able to be paired with OAHTCs. However, if you already have a reservation for AWHTCs, an exception can be made with the Wildfire Direct funds.

Question: Are you able to advise which supplemental documents column the wildfire app should follow under the instructions tab?

Answer: Wildfire projects are subject to all LIFT programmatic requirements; it would be LIFT Rental.

Question: We still do not require developers follow the Core Development for LIFT projects unless paired with 4% LIHTC, right? I'm assuming that for LIFT/Wildfire Direct awards, since they don't have 4%, following the CDM doesn't apply either.

Answer: This is correct.

Question: Just confirming that a project is eligible for LIFT Wildfire Direct awards, and to receive points, it needs to be in one of the three impacted tiers. A project cannot be in just any part of the designated county and expect to get points. According to the NOFA, it's the latter.

Answer: For the Wildfire Direct awards, there's no scoring. If the project meets the NOFA requirements, it can be funded, as long as there is funding available. Applications are reviewed on a first come, first reviewed basis. Projects can be anywhere in the counties specified in the NOFA. If a project is coming in for regular LIFT, the point system developed last year is used and projects in specific areas can receive up to 5 points.

Question: Where can I find information about LIFT Wildfire Direct awards?

Answer: A webinar about how to apply for Wildfire Direct is located here:

https://us02web.zoom.us/rec/share/5-OJUve-k2V8FoVcWo_4gc6vkSEie8yx78s9GGKv-o6a_gAEzZjj-18bHlirCRq4.Gk4DI5teKsRIP0cD

Access Passcode: 9\$5XQ?p

LIFT Rental:

Question: We are finalizing our LIFT NOFA applications for submission and noticed that the RS Means calculation in the scoring section is excluding on-site and off-site costs – this is different than how that metric was scored in the pre-application and I wanted to make you aware in case there is an error in this scoring section of the application.

Answer: I got a response from our application team about this. So the pre-application was just an opportunity for you (and us) to see how your project would hold up against the RS Means before you had access to the entire application. In the NOFA application, we sum all the hard construction costs from that category in the Uses page (which flowed through the entries in the SOV page) and added in architect fees. This is how we've calculated it for the last few years and it consistent with what we've done in the past.

----- End of New Questions-----

Correction: If your project is using OAHTCs to get to 30% units in order to get points for lower rents in the competitive LIFT NOFA, the number of units claimed on the application will be restricted at 30% on the OAHTC declaration for up to 20 years.

Question: Can a project count units reduced from 60% AMI to 30% AMI through OAHTC towards 30% unit scoring, or must all 30% commitments be through the rents page prior to application of OAHTC buydown?

Answer: All 30% commitments must be through the rents page prior to the application of the OAHTC buydown.

Question: The pre-application included a breakdown of projects by location specific set-aside, but did not include a breakdown of projects led by Culturally Specific Organizations or Federally Recognized Tribes. Will you be publishing Pre-Application statistics with details about the CSO or Tribal Led set-aside?

Answer: We are not able to do this at this time. Information from full applications is needed to vet whether those applicants that applied as Culturally Specific Organization meet the definition.

Question: What additional attachments are required and/or recommended?

Answer: You can find all required attachments on the Instructions page of the NOFA Application. Please look at Column F, lines 37 through 71.

Question: The General Policy and Guideline Manual (GPGM) sets forth a Construction Inflation Factor / Cost Escalator guideline of 3% of total construction costs. If an applicant is using an escalation factor (cell 168 on the Construction SOV tab) higher than 3% would this be considered a waiver of an OHCS policy or guidelines and need to be included in the response to, "Please list any anticipated request and justifications for waivers to any OHCS policies or guidelines on the narratives tab of the NOFA Application?"

Answer: We are allowing higher escalation factors from construction quotes this NOFA round due to the construction market volatility.

Question: If awarded LIFT funds my project would be ready to close in November of 2022. Since the timing for closing on the 4% bonds is contingent upon OHCS's project pipeline and OHCS has indicated their expectation is that no 4% LIHTCs with PAB will close in 2022 what date should be entered into the Development Schedule? The date when I would be ready to close or should I make an assumption about when in 2023 OHCS might have a date available for closing?

Answer: Please give a realistic answer about when the project will be ready to go to construction closing.

Question: Is the Excel application also the proforma, or is there a separate proforma document?

Answer: Yes, the Excel application excel is also the proforma.

Question: On the MWESB Engagement Tab of the application: should all info be input in the Excel application excel or should supplementary documentation be uploaded?

Answer: All information should be put into the appropriate sections on the application. Supplementary documentation can be uploaded if needed.

Question: What should the application file be named? " _____ " _2022-2_Apartment_Name?"

Answer: You can find this information on the Instructions tab of the NOFA application.

Question: Can you please clarify what you are looking for when you ask for "demographics of GC's staff and team members"? **Answer:** When we say staff and team members, we are looking for administrative staff, the construction and leadership teams, and any interns or trainees on the payroll.

Question: For contractor escalation we should build it into the line items so that it calculates the total correctly? Our contractor is carrying a separate line item for escalation but I can try to spread it across the divisions if that is what's suggested.

Answer: Correct, if you look to the left of Escalation %, there's a note in Column C that on the Budget Uses page, that the escalation is distributed evenly across the sites. The 10% escalation in cell F168 is added into the Total Primary Construction Contract Amount in cell F166. So the \$37,425,435 of the construction contract amount that shows in F166 on the Construction Cost SOV should total the entire amount in column E, lines 21-33.

Question: The 3-25-22 FAQ update says "LIFT Narratives" are limited to 500 characters (not counting spaces) in each response. Does this apply to the workbook tab "Narratives" or just to the tab "Scoring LIFT Narrative"? Please note that the only place "500 characters" appears in the NOFA is on page 19 concerning "communities of color" responses.

Answer: The 500-character limit is only for the Communities of Color Narratives per the NOFA. Sponsors are expected to keep to the 500-character limit, which should be approximately half a page if written on word document. Unfortunately, the application does not include a character cap for those questions, but staff will be reviewing the character cap as part of the preliminary review. Anything over 500-characters (not including spaces & returns) may be truncated down for review purposes.

Question: The Budget uses tab, cell D149 is not pulling in all of the GC Profit/Overhead/General Conditions from Construction Cost SOV F165. The same error occurs on Proposal Summary C119.

Answer: I don't think this is an issue, it is pulling in the Profit, Overhead, and GC lines from the SOV tab (F158+F159+F161). That's all it should be pulling in.

Question: Sources and Uses does not have a line for the construction contingency or the construction cost escalation which are cells E31 and E39 on Budget Sources. The total on Sources and Uses cell F132 is coming from Budget Uses cell E126 rather than actually totaling the numbers in column F in Sources and Uses.

Answer: The Sources and Uses tab is optional at application, which is why it doesn't include any escalation or contingency. It's required upon final application so you can show a breakout of what sources paid for what uses.

Question: The LIFT applications include LAP as a source of funds when applying. Is it the intention of the department that we should show those funds when we apply in this LIFT round? If so, will we be notified of a LAP award ahead of the application due date?

Answer: No. LAP is not intended to be shown as a source for funding for the NOFA. If you apply for LAP and LIFT, the LAP loan would need to be paid in full upon the closing of the LIFT loan.

Question: If a LIFT-only project has deferred developer fee and/or seller financing on land, will OHCS require those loans to be paid off in 15 years? The project will not have LIHTC, therefore no IRS requirement to repay in 15 years. If the sponsor/developer is flexible on when those get repaid, can they extend out to 20-30 years or beyond?

Answer: We would prefer that any deferred developer fee repayment happens within the standard 15-year period that LIHTC needs. Any seller notes or seller financing can have a longer term, but if it's called a deferred developer fee, it's highly encouraged to keep in line with that 15-year repayment period.

Question: On the Scoring LIFT Quantitative Tab on questions on lines 57-60..the questions appear to be asking if the components were included in the Site Checklist, but line 62 could be read two ways.

Is the intent:

1. To answer 'Yes' if any "flood plain and wetlands issues" were addressed, and/or not found. (I.e. an acknowledgement of component inclusion); or
2. To answer 'Yes' if any "flood plain and wetlands issues" exist, or "No" if no "flood plain and wetlands issues" exist?

Answer: The intent is the first option.

Question: If sponsor financing is part of the sources for the project, does OHCS want to see any documentation for sponsor financing in the application? Either some form of letter confirming the financing or something else? Or can it simply be articulated in the narrative?

Answer: No, we don't require any documentation for sponsor financing. Just explain it in the narrative.

Question: We are in the process of submitting a project for the LIFT Rental NOFA, which we are pairing with 4% LIHTC and PAB's. We are familiar with the [OHCS Charges table](#), however, we wanted to confirm a few fees that we did not see addressed in that table. Is there an ongoing bond issuer fee? Any other ongoing fees outside of compliance monitoring fees? Please confirm the current costs or estimated costs for the following if applicable:

- OHCS Financial Advisor
- TEFRA Notice
- Bond Issuer Legal
- Agency cost certification review fees (Bond + LIHTC)

Answer: You can find the 4% and PAB charges located in our General Policy and Guidelines Manual (GPGM). <https://www.oregon.gov/ohcs/development/Documents/admin/manual-general-policy-guidelines.pdf>. It starts on Page 24. But it's section IV(E). Program Charges. The Charges Table that is published on the NOFA page has updated charges, but if any charge is NOT listed on that Table, you should refer to the GPGM.

Question: Just to confirm, no architectural drawings are required to be submitted with LIFT only applications? Not even a site plan?

Answer: That is correct. LIFT does not require anything to be submitted if it's a LIFT only project. However, if you'd like to submit a site plan, please feel free to do so.

Question: Will the LIFT Rental application workbook be updated to reflect 2022 LIHTC rent adjustments anticipated to be published on April 1, 2022?

Answer: No, for the 2022 LIFT NOFA, we will use 2021 rents throughout the scoring process.

Question: In the *Serving Communities of Color* Section, question 5 notes that "Signed MOU's with service providers are required in order to score points for this section." Does the requirement to have an MOU apply if the developer is also the service provider and is a Culturally Specific Organization?

Answer: If the developer is the service provider AND is a Culturally Specific Organization, a Letter of Commitment written on company letterhead will suffice.

Question: Regarding the Development Team Capacity points: Criteria J.iv. offer one point for "Multiple Project Reservations: If applicant has multiple project reservations with OHCS, explain how the development team has the capacity to support all projects simultaneously administratively and financially." How does a sponsor without multiple reservations obtain this point? Or is the intent for this point to only be available for sponsors with multiple reservations?

Answer: If a sponsor does not have multiple reservations with OHCS, they will earn full points for this question.

Correction: If your project is using OAHTCs to get to 30% units in order to get points for lower rents in the competitive LIFT NOFA, the number of units claimed on the application will be restricted at 30% on the OAHTC declaration for up to 20 years.

Question: Can a project count units reduced from 60% AMI to 30% AMI through OAHTC towards 30% unit scoring, or must all 30% commitments be through the rents page prior to application of OAHTC buydown?

Answer: All 30% commitments must be through the rents page prior to the application of the OAHTC buydown.

Question: It appears that there are two ways of calculating the managers unit rents in operating costs. One is to have the Manager's unit as a no cost unit to the Manager, i.e. not show in rents or expenses. The other is to include the managers unit rent as income, and then to provide a stipend reduction under operations... that is not necessarily equal to the full market rent. We track the second option, so Managers unit rents should be included in total income...Unless OHCS specifically requires otherwise, which I don't think is the case? Additionally I would assume that Total Residential SF should include managers units, as its residential unit space.

Answer: So, for LIFT, we can only fund units at 60% AMI or lower, with the exception of 1 unrestricted managers unit. As far as following LIHTC guidelines, OHCS considers a manager's unit that is unrestricted as a common area that supports and/or is reserved for the benefit of all the rental units in the property. Rents should not be collected for a management unit considered a common area unit if the household (including employees) that occupy the unit are not LIHTC certified. This information can be found in OHCS's LIHTC Compliance Manual on page 25. The Manual is located under Manuals & FAQs on this page: <https://www.oregon.gov/ohcs/compliance-monitoring/Pages/compliance-lihtc-program.aspx>.

Question: For the following tabs in the Excel Application Workbook, will you please confirm that typing in the name of the authorized signatory on the "signature" line item will suffice as a signature?:

- Applicant Agreement
- Authorization & Acceptance
- DEI Agreement
- Ownership Integrity

Answer: Yes, this will work for NOFA submission. Those forms will need to be signed before construction closing, if chosen for an award.

Question: Can you confirm that the LIFT Narratives are limited to 500 characters? I believe in the past they were limited to 500 words. 500 characters are not a lot of space to answer the detailed scoring questions. For 500 characters is that including spaces as characters or not?

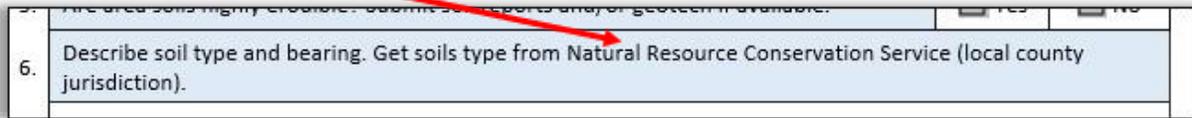
Answer: Narratives are limited to 500 characters, not counting spaces between words or sentences. 500 words is approximately a page in a word document and because of the large volume of applications received each year for LIFT, we'd like to see narratives at half a page or less.

Question: When do you anticipate our Portfolio Performance will be available to us? Will that be uploaded into Procorem?

Answer: The Portfolio Performance scores are being compiled now and will be published soon.

Question: Are third party reports such as the Phase I and geotechnical reports required to be submitted with the application? Section 3.3(C)(2)(iv) of the NOFA lists third party reports such as Geotech and Phase 1.

Answer: Provide the documentation as described in the site review checklist.



The image shows a screenshot of a table with a red arrow pointing to item 6. The table has columns for item number, description, and checkboxes for 'YES' and 'NO'. Item 6 is highlighted in blue.

6.	Describe soil type and bearing. Get soils type from Natural Resource Conservation Service (local county jurisdiction).	<input type="checkbox"/>	<input type="checkbox"/>
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We are looking for the site review checklist to be filled out with documentation submitted with the application to back up the answers.

Question: Is it possible to change the project name from the one submitted in the pre-app?

Answer: Yes, it is fine to change the project name. Please provide an explanation memo noting the name has changed.

Question: As I was looking though the scoring I noticed there seem to be a possible 105 point to score out of 100. Will you let me know if I have double counted a section? If 105 points is correct, will this affect threshold?

LIFT Subsidy	15 points
Unit Size	5 points
Readiness to Proceed	10 points
Serving Comm of Color	29 points (24 still showing in workbook)
AMI	5 points
Construction Costs	6 points
Innovation, Efficiency, Replicability	6 points
MWESB	5 points
Financial Viability	10 points
Development Team Capacity	4 points
Owner / Portfolio Performance	5 points

Wildfire Disaster Area	5 points
	105 points

Answer: The 5 points for the Wildfire scoring are bonus points that can be given to projects physically located in the census tracts that lost units during the 2020 wildfires. This does not affect threshold.

Question: Can we submit LIFT and Land Acquisition Revolving Loan Program (LAP) now?

Answer: LIFT's pre-application period closed on February 18th, so at this point, we're not accepting new pre-applications for LIFT. We will begin accepting pre-applications for LAP on April 1st.

Question: I see that there was an update to the LIFT Application provided. Is there any extension of application due date timing associated with the update or future update(s), and/or is there a cutoff so that we know the file will not further be updated?

Answer: There will not be an extension of the application due date for LIFT applications. If there are any other application issues, our application team has said they are willing to update any work-in-progress applications, with a turn time of less than 24 hours. Since launching our web-based application error reporting page in the FAQs last Friday, all items reported were fixed in the March 16 update with no additional errors reported to date.

Staff have been made aware that there were some needed fixes for the 2022-2 LIFT Rental application. Updated applications have been uploaded to work centers. The updates made are:

Operating Budget	C164 / DCR	The required reduction from OAHTC Calc cell E25 was not being pulled into Operating Budget C164, and the DCR was not reporting correctly. Fixed.
	Row 167, all cells other than C167 and D167	All cells in this row should be using net cash flow to pay down deferred development fee, but only cells C167 and D167 are doing that correctly. Fixed.
Sources and Uses	Cells AJ36 to AJ47, AJ82 to AJ83, and AJ97 to AJ102.	These should all have the same formula as in cell AJ35, but they do not. Fixed.
	F101	This cell is displaying #REF! Fixed.
	D53 and D54	Referencing wrong cells. Fixed.
Scoring LIFT Narratives	F17	The cell is locked and has no dropdown. It should allow us to enter either Urban or Non-Urban or it could pull this information from Project Details, F18. Removed
Lift Scoring Quantitative	C88 and C89	These cells are displaying #REF! Fixed.

Proposal Summary	Missing Table	Added unit mix table to summary page, was missing.
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Question: Are LIFT applicants required to submit a Resident Services Plan?

Answer: LIFT does not require a traditional Resident Services Plan, instead we are looking for Service to Communities of Color, per NOFA section 1.5(B).

Question: Because the CDM does not apply to LIFT projects that are not receiving LIHTC financing, can you confirm if studios that are under 350 SF will be considered studios and not SROs, and what the cut off between the two is for non-LIHTC projects?

Answer: The square footage of a studio unit does not determine the designation of a studio or an SRO, the presence of a bathroom and kitchen area does. To be considered a studio, the unit must have an unshared kitchen area **AND** an unshared bathroom.

Question: Can I apply for LIFT funds if I have a Private Activity Bond (PAB) allocation from an entity other than OHCS?

Answer: Projects that use PAB authority to be issued by other entities to generate 4% LIHTC are not eligible to receive LIFT funds from OHCS for their project. OHCS would have to be the issuer of PAB for a project to be eligible for LIFT and any other State development resources, with the exception of the Oregon Affordable Housing Tax Credit.

Question: Our project is unique in that it already has a Private Activity Bond (PAB) allocation. Is it eligible for both the LIFT Only and LIFT with 4% LIHTC set asides?

Answer: Projects that use PAB to be issued from other entities to generate 4% LIHTC are not eligible to receive LIFT funds from OHCS for their project.

If a project is planning to use 4% LIHTC/PAB, it should apply to the LIFT with 4% LIHTC/PAB set aside, including the following scenarios: 1. A project has received a PAB allocation from OHCS, meaning that the allocation has been approved by the Housing Stability Council for the project 2. A project has submitted a PAB reservation (including an intent resolution being issued) but has not yet been approved by the Housing Stability Council.

If the project has a PAB allocation to be issued by an entity other than OHCS and there are no other OHCS resources in the project, it is not eligible to receive LIFT or any other state resources from OHCS, with the exception of the Oregon Affordable Housing Tax Credit. To be eligible for LIFT in these cases, OHCS must be the PAB issuer.

Question: On the Operating Budget Tab, line 147 "Additional OAHTC Pass-through" is displayed in red and in parentheses. Since no other display like that occurs in the workbook, I thought I should ask what this represents.

Answer: This means the amount of passthrough that you are putting in the "Actual OAHTC Annual Pass Through" field in the OAHTC Calc page is less than the required amount calculated on the same page.

Question: It is our intent to execute an Option to Lease Agreement in the future. Would a Memorandum of Understand (MOU) between parties that outlines specifics around the intent to execute a long-term land lease, the land lease agreement process, and timeline for execution in relation to the LIFT funding source be acceptable to demonstrate site control?

Answer: Yes, this is an acceptable way to demonstrate site control.

Question: Does the LIFT program still require OHCS retaining 10% of the funds until completion of construction?

Answer: For projects that have a capital stack that includes 4% LIHTC and PAB, we can allow the 10% retainage to be drawn down prior to completion of construction. This is due to the 4% LIHTC 8609s that are held back until construction completion. If a project does not have 4% LIHTC, the full 10% will be held back.

Question: The NOFA states we need to submit all required 4% application materials in addition to LIFT materials for LIFT with 4% LIHTC/PAB applications. Which level of 4% LIHTC application should we submit- the 4% Pre application or the 4% Application?

Answer: We're looking for the bond pre-application materials, which is now included as part of the LIFT NOFA application. No additional information is required at application and a separate 4% pre-application with 4% proforma is not required at application.

Question: In the Scoring LIFT Narrative Tab, rows 192-95 and 199-202, it will not let me edit the text I have entered. When I hit F2 to enter edit mode the text disappears.

Answer: The Development Team Capacity narratives on the Scoring LIFT Narrative tab pull directly from the Narrative tab. As stated in line 156, if you want to edit it, please edit on the Narrative tab.

Question: Is the date from which the project schedule is assessed the Application due date, or a presumptive award date?

Answer: It is the date of the reservation letter. Reservation letters are generally sent within a month of the Housing Stability Council approval.

Question: There appear to be several repetitive questions related to experience of the team. The same questions shows up on the Narrative tab, the LIFT Scoring Tab and on the Development Capacity Worksheet. Is OHCS expecting the same information in each of these three places?

Answer: The Development Capacity Worksheet is a form we provide as a supplement to the development team questions on the Narrative tab in case formatting causes issues. We encourage everyone to use the space in the Narrative tab since the LIFT scoring tab pulls the narratives directly from the same questions in the Narrative tab.

Question: In addition to the "OHCS NOFA Application_2022-2_LIFT Rental" excel spreadsheet and all supplemental documents listed in the table provided on the "Instructions" tab, should we submit a separate narrative pertaining to the following?

- "Serving Communities of Color" responses (pages 19 and 20 of NOFA pdf).

- “Demonstration of innovation, efficiency and replicability of building development or finance strategy” responses (pages 20 and 21 of NOFA PDF).
- “M/W/ESB Engagement” responses (pages 21 and 22 of NOFA PDF).

Answer: If you scroll through the tabs, you should find the MWESB Engagement Strategy, Scoring_LIFT Quantitative, and Scoring_LIFT Narrative tabs in between the financial tabs and the Applicant Agreement/Authorization and Acceptance tabs at the end.

x	x	x	x	x		
x			x	x		x
x			x	x		
Commercial Operating Budget	MWESB Engagement Strategy	Scoring_LIFT Quantitative	Scoring_LIFT Narrative	Blank Worksheet	Applicant Agreement	

Question: Please clarify whether a Geotech or Phase 1 is necessary to score full points in the Readiness to Proceed category?

Answer: Readiness to Proceed, under the competitive scoring Section 3.3 (C)(2)(i)-(vi) references the Site Review Checklist that was submitted with the preapplication. Please refer to the checklist for what reports are acceptable.

Question: The NOFA states the scoring for Serving Communities of Color is up to 29 points, with a minimum score of 8 points to qualify for funding, whereas the application states the scoring for Serving Communities of Color is up to 24 points, with a minimum score of 6 points to qualify for funding.

Answer: The NOFA is correct; the application is incorrect. This scoring category is 29 points with a minimum score of 8 points to qualify for funding.

Question: How do I tell if a jurisdiction is Urban or Mid-sized Urban?

Answer: To look up the population of the jurisdiction used, refer to the Blue Book page on the Secretary of State’s website here: <https://sos.oregon.gov/blue-book/Pages/local/city-population.aspx>

Urban Communities: All jurisdictions within the Portland Urban Growth Boundary regardless of size, and communities with populations of 40,000 and above in the balance of the state.

Question: Was the pre-application data for NOFA 22-2 LIFT Rental published on March 4?

Answer: Yes, you can find that information on the LIFT NOFA page, under Notices & FAQs. Here is the link: <https://www.oregon.gov/ohcs/development/Documents/nofa/2022/LIFT-2022-PreApp-Stats-Rental.pdf>

Question: Regarding the LIFT Rental Application, I do not see any application questions relating to Communities of Color and only one question on resident services (narratives tab). It also appears from the Supplemental Documents table on the Instructions tab that an RS plan is not required for the LIFT Rental application. Can you confirm if these observations are correct - no questions/narrative on Communities of Color and only one question about resident services - or if they are in the application and I am missing them, can you point me in the right direction?

Answer: At this point, the only applications released were for wildfire projects. These are not the same applications that will be released for the competitive offering on Friday March 4th per the NOFA.

Question: Regarding the LIFT loan in general, specifically how has it worked in the past with projects leveraging a HUD221(d) loan? Our lender worked with a LIFT winner in the past and the owner dropped the HUD loan for some reason as it had something to do with subordination issues. Have other LIFT winners had any issue executing a HUD221(d) with a LIFT award?

Answer: The answer is no – no LIFT projects have closed with a HUD221(d) loan. LIFT requires that the Deed of Trust be in a first lien position which is probably why they had issues with subordination.

Question: Given there are private activity bonds set aside for LIFT projects, how fast could close occur for the 4% LIHTC portion in 2022 following the LIFT award?

Answer: Secondly, timing for the bond portion will depend on how the pipeline looks when we take the approvals to Housing Stability Council. At this point, expectation is that no 4% LIHTCs with PABs will close in 2022.

Question: What is the “Owner and Development Performance Letter” that’s found on the LIFT checklist? It says sponsor provided and we are unfamiliar with this requirement.

Answer: Please see section 3.3(K) on page 23 of the NOFA which discusses the Owner Performance Letter.

Question: Our project is planning to adhere to the City of Portland’s N/NE Preference Policy as part of our lease up efforts. What information do we need to provide with our application?

Answer: Please provide evidence that the N/NE Preference Advisory Board is aware of your project by reaching out to Matthew Tschabold and Dyvisha Gordon at Portland Housing Bureau at Matthew.Tschabold@portlandoregon.gov and Dyvisha.Gordon@portlandoregon.gov. They will provide a letter that you can include in your application.

Question: Where can I find the Affirmative Fair Housing Marketing Plan form? It says it should be in the workcenter, but I can't find it.

Answer: The AFHMP is not a required submission for the LIFT NOFA, this was marked incorrectly on the application.

Question: Can you direct me to the spreadsheets summarizing the "winner" projects under the 9% 2021 NOFA and the LIFT Rental 2021 NOFA?

Answer: You can find all of the past NOFA Recipients on our webpage here: <https://www.oregon.gov/ohcs/development/Pages/applicants-developments.aspx>

Question: Please confirm that it is ok for a project to apply both under NOFA 22-2 LIFT Rental and under NOFA 22-5 9%. If two applications are filed, does OHCS allow them to compete all the way through scoring? What happens if both applications score high enough for a reservation under each NOFA?

Answer: You can apply for both, paying both application fees, but OHCS will determine which NOFA you will be awarded from.

Question: Under the NOFA 2021 DHC and NOFA 2022-2 Application review, there is a bullet with “NOFA Cover Sheet”, submitted by due date and time. Where do I find this document?

Answer: This is an old document we no longer use, it was similar to the charge transmittal and our instruction tab.

Question: There is a limit of 2 projects being awarded to the same developer in this NOFA. Is there a limit on the number of projects that can receive a funding award that use the same development consultant?

Answer: No. There is only a limit on developers/co-developers.

Question: Regarding the 2022 LIFT Rental NOFA pre-application, I have a question about the “Most similar RS Means building type” question on the LIFT Rental tab of the pre-application. Our two buildings best fit the “Fiber Cement Siding/Wood Frame” material type selection. Our buildings are 4 stories, and we only see that material selection for 1-3 story buildings. Do you suggest that we select “1-3 Story with Fiber Cement Siding/Wood Frame” or one of the 4-7 story options that will accurately reflect our stories but not our materials type?

Answer: Please select the building that best fit your project.

Please Note: Pre-applications for the LIFT Rental NOFA were due February 18th by Midnight.

Question: Is there a maximum LIFT subsidy amount for 4 bedroom units?

Answer: Yes, it’s in the Framework but not the actual NOFA. For units larger than 3 bedrooms, an additional \$20,000 per bedroom is added to the subsidy maximum.

Question: Are all of the site review checklist attachments required at pre-application?

Answer: No, only the site review checklist is required at pre-application, the attachments can follow with the rest of the NOFA application on April 22.

Question: Does satisfaction of the LIFT loan take place after the first affordability period expires or at the end of the extended affordability period?

Answer: Upon extending the affordability period for an amount of time equal to the first affordability period, the loan will be considered satisfied.

Question: Can LIFT 4% be paired with AWHTC? Is there still funding in the AWHTC program since it is first come first served?

Answer: Each NOFA has a list of OHCS funding sources that are being offered in that funding offering. For LIFT with 4%, it is OAHTC’s, and Private Activity Bonds. And the 2022 standalone AWHTC Application states that anyone applying for AWHTC can’t apply for other OHCS funds. As far as if there is still funding in the AWHTC program, the program manager is reviewing applications as they come in. Currently there are still funds available, but this could change at any point as applications continue to flow in.

Question: Do you have to have site control before the preapplication deadline (2/18/22), or just demonstrated site control by the full application deadline on 4/22/22?

Answer: You must have demonstrated site control by the full application deadline.

Question: Where in the workbook do we account for our lease payment for the land for the project? Our lease payment is also based on rental income.

Answer: If you have a lease payment for the land that is based on rental income, the best place to account for this would be on the Operating Budget tab. The workbook accounts for a 2% increase in rents each year, while the expenses increase by 3% each year. There is also a section on the Operating Budget tab where you can provide an explanation for the difference in the lease income over the 30-year proforma period. There is also a Blank Worksheet Tab that you can use to model what you think the actual lease payments will do over this 30-year period.

Question: 1. Can a previously awarded local PJ HOME funds be paired with LIFT Rental funds? 2. If a project applies for this LIFT NOFA does that mean it cannot apply for the later 9% LIHTC NOFA? In previous years I think I remember there have been restrictions about applying for similarly timed LIFT rental and 9% LIHTC NOFA's.

Answer: 1. If you have a PJ HOME award, those funds can be paired with LIFT. 2. LIFT Rental funds and 9% LIHTC are not being offered together in a NOFA this year. Each NOFA has a list of the different funding resources that can be applied for in that offering. For 2022, the funding sources available in the LIFT Rental NOFA to pair with the LIFT Rental funding source are OAHTCs and 4% LIHTC with Private Activity Bonds. When the 9% LIHTC NOFA is released, it will have a list of the funding sources available to pair listed with 9% LIHTCs in the NOFA document, and it will **not** include LIFT Rental.

Question: Please confirm that the Zoning Certification Form isn't due until the proposal application is due on April 22, 2022. Its link is listed under the project site review checklist on the OHCS LIFT Rental NOFA website, but it isn't listed pre-application submission material in the pre-application spreadsheet instructions or the NOFA PDF instructions Section 2.1 Pre-Application and Application Access. I'm just wanting to be absolutely sure that the intent from OHCS is to provide the form to allow time to complete this requirement for the final proposal application and not attempt to submit at this point in the application process.

Answer: The Zoning Certification form is not due until April 22nd. The intent of making it available on the webpage was to allow applicants extra time to get it filled out by the various jurisdictions.

Question: Is the pre-application due at 4:00PM PST or Midnight on February 18, 2022? There is conflicting information between the pre-application spreadsheet, OHCS LIFT Rental NOFA website and Section 2.1 Pre-Application and Application Access of the NOFA PDF instructions.

Answer: The LIFT pre-application is not due until midnight on February 18th. This is for LIFT only.

Question: Does the Real Estate Holdings schedule need to be submitted as part of the February 18, 2022, pre-application? It's noted on the Project Input sheet of the pre-application spreadsheet, but in that same section, it states to "include the REO schedule in your Procorem Workcenter prior to submission of this application." As applications won't have access to their Procorem Workcenter until after the pre-application is submitted, it leads me to believe that the REO schedule is intended to be submitted later, prior to the April 22, 2022, proposal application submission and not for the pre-

application. Could you please confirm when this requirement is to be submitted and confirm the means if different than the future assigned Procorem Workcenter.

Answer: The Real Estate Holdings form should be submitted along with your preapplication and site review checklist.

Question: I am hearing from the City of Portland planning staff they are 2-3 weeks out for zoning verification forms or land use compatibility statements. Are you hearing this from other applicants in the Portland area? If we do not receive the zoning form back before the February 18th deadline, can we submit the applicable portions of the planning code that clearly show how the proposed multi-family project is allowed outright, and follow up with the zoning verification form in the full application?

Answer: The Zoning form is required at the NOFA deadline, not at the pre-application deadline. It's been put out because of the amount of time it takes to get it back from the jurisdictions across the state.

Question: Does a project have to have PAB reservations to apply for 2022 LIFT with 4%? Or has OHCS already set aside PABs for those LIFT awards?

Answer: A project can apply for both LIFT and 4% LIHTC/PAB through the LIFT NOFA.

Question: Does LIFT allow income averaging similar to LIHTC to serve households up to 80% AMI, but the project average remains at or below 60% AMI?

Answer: LIFT Rental is not allowed to pay for units over 60% AMI. If doing income averaging through the LIHTC program, only units at or below 60% AMI will be eligible for funding.

Question: Are the set-asides of LIFT with or without 4% LIHTC for projects do/don't currently have PAB reservation from last year, or does it mean that the project will/will not ever seek 4% LIHTC as part of its capital stack? I want to apply with two projects, both to be financed with 4% and LIFT. One project has a PAB reservation from last year, and one does not. Should both be applying for the "LIFT with 4%" category, or am I misunderstanding something?

Answer: If the project's capital stack includes 4% LIHTC, then that project would fall under the LIFT with 4% category.

Question: Which source should be used to confirm jurisdictional population sizes to determine if a jurisdiction falls in the Mid-Sized Urban set aside or Urban set aside for the purposes of the LIFT + 4%/PAB applications. Language in the NOFA:

Metropolitan Statistical Areas (MSA): geographic regions delineated by the United States Office of Management and Budget. MSA is the formal definition of a region that consists of a city and surrounding community that are linked by social and economic factors. Oregon counties located in MSAs are Benton, Clackamas, Columbia, Deschutes, Jackson, Josephine, Linn, Lane, Marion, Multnomah, Polk, Washington, and Yamhill Counties.

Mid-Sized Urban Communities: Jurisdictions outside of the Portland Urban Growth Boundary, that both have a population between 15,000 and 40,000 and are in a county that is part of an MSA.

Answer: OHCS uses data from Portland State University's Population Research Center for our NOFA work. Luckily for us, this information can also be found on the Oregon Blue Book webpage: <https://sos.oregon.gov/blue-book/Pages/local/city-population.aspx#InplviewHash7a3a9d2f-7c53-41ab-bd44-2f807f107a1c=SortField%3DRank-SortDir%3DAsc>

Question: Regarding guidance on site control requirements, would an Intergovernmental Agreement, signed by city and county, specifying that after cleaning up a site the County will transfer it to the Sponsor, be sufficient evidence of site control? Is there anything in particular that the Agreement needs to stipulate to meet OHCS' needs?

Answer: Provided that the Intergovernmental Agreement mentions the project sponsor and includes (at a minimum) a timeline for when the site would be transferred to the developer and the address of the site/property description, it should work.

Question: We still do not require developers follow the Core Development for LIFT projects unless paired with 4% LIHTC, right? I'm assuming that for LIFT/Wildfire Direct awards, since they don't have 4%, following the CDM doesn't apply either.

Answer: This is correct.

Question: Just confirming that a project is eligible for LIFT Wildfire Direct awards, and to receive points, it needs to be in one of the three impacted tiers. A project cannot be in just any part of the designated county and expect to get points. According to the NOFA, it's the latter.

Answer: For the Wildfire Direct awards, there's no scoring. If the project meets the NOFA requirements, it can be funded, as long as there is funding available. Applications are reviewed on a first come, first reviewed basis. Projects can be anywhere in the counties specified in the NOFA. If a project is coming in for regular LIFT, the point system developed last year is used and projects in specific areas can receive up to 5 points.

Question: Will there be another LIFT NOFA without 4%? I don't see the higher per unit limits referenced in NOFA 22-02?

Answer: The per unit limits are in section 1.2(F). The subsidy amounts for LIFT using 4% with Conduit Bonds is located on the bottom of page 6. The LIFT only subsidy amounts are located at the top of page 7.

Question: We are hoping to apply for LIFT loan as a for-profit developer using the money that is set aside for projects that are not pursuing LIHTC Funds. Do we need to have a non-profit partner as part of the ownership group, or can we have a culturally specific group as a consultant and leading the projects initial marketing and outreach efforts, community involvement in design +Planning and ongoing community involvement and culturally specific operations?

Answer: LIFT is given as a loan, so no non-profit partners are needed for for-profit developers. Partnering with a culturally specific group as a consultant, is allowable.

Question: If a project already has 4% LIHTC reservation but a funding gap due to increased costs, can it apply for just LIFT funds in this NOFA?

Answer: In this scenario, a NOFA application under the LIFT with 4% LIHTC would need to be submitted. Please Note: a separate 4% LIHTC/Bond pre-application should not be submitted with LIFT with 4% projects, all needed information is provided in the LIFT application.

Question: To clarify, the preapplication is due by Feb 18 or 22?

Answer: Pre-applications are due on Feb 18, 2022.

Question: Can you clarify the email address for submitting the preapplication? Is it MFNOFA@hcs.oregon.gov or MFNOFA@oregon.gov?

Answer: Both addresses send emails to the same inbox, so either can be used.

Question: Can you clarify site control again please. Does site control need to be shown through 2022?

Answer: Site control must be valid through December 31, 2022.

Question: Will a list of submitted pre-apps be published?

Answer: Pre-application data and a list of pre-applications will be published during two-week window between the due date for pre-applications (Feb 18) and release of the full application (March 4).

Question: Can we provide a zoning letter saying that the zoning change has been initiated and is in process along with the zoning form?

Answer: As Section 3.2(A)(2), p.17 of the LIFT Rental NOFA states, any zoning change must be complete prior to application submission.

Question: It would be helpful to have the zoning certification form posted on the webpage so that applicants can access it prior to March 4.

Answer: Please find it posted here:

<https://www.oregon.gov/ohcs/development/Documents/nofa/2022/Zoning-Certification-Form.docx>

Question: What is the annual compliance fee for a project using LIFT with 4% LIHTC?

Answer: Projects with LIFT and 4% LIHTC would pay the LIHTC/Conduit Bond compliance fee of \$45 per unit per year only. Projects using LIFT without 4% LIHTC will pay the LIFT compliance fee.

Combined Resources Pool:

Question: In addition to building envelope improvements, are HVAC and elevator modernization eligible uses?

Answer: HVAC and elevator modernization do count as eligible uses. Both count as potential health and safety concerns when not in good working order.

Question: Can the preservation grant funds be used to cover both hard and soft cost such as permits, consulting fees, legal, temporary relocation, etc.?

Answer: Yes, in general, the Preservation Funds can be used for both hard and soft costs.

Question: In the past, on similar preservation projects, we have budgeted for a modest sponsor organization project management fee. Would this type of fee or a smaller developer fee be allowed in the budget if covered by non-OHCS sources?

Answer: Nothing in the application materials prevents you from including this in your budget.

Question:

1) Regarding preservation funding, is it limited to envelope improvements only – or are other building systems (i.e., HVAC, MEP, Structural) or unit/common area interior repairs eligible uses for this source under the “...**and major system degradation and/or health and safety issues**”?

2) And will this also be the case in the September NOFA?

3) Additionally, can you share how much of the current preservation pool has been allocated to-date? And how much might be remaining at this time?

Answer:

1) Everything you’ve listed falls under approved uses for preservation funding from the Preservation Pool.

2) The broad categories that will make up the approved activities for the September Preservation NOFA are:

- Projects at risk of expiration of Federal rent assistance
- OHCS Portfolio Projects at risk of expiration, and
- Risk of loss due to physical condition

We will have more specifics available in the NOFA.

3) As of 3/21/22, the Preservation Pool in the Combined Pools Application has only received one complete application. Most of the funds are still available.

Question: Can a sponsor only apply to the Combined Pools Resource once per year?

Answer: Sponsors can apply to the Pool Funds with multiple projects while the application period is open. However, sponsors are limited to only one of the pools per project and applications for multiple projects from the same sponsor should be staggered with 15-day intervals between submitting applications.

Question: Regarding the Affordable Rental Housing Portfolio Preservation Pool and the OAHTC Pool, would a successful application for OAHTCs preclude an applicant from obtaining other OHCS funds for the same project in the future? The application instructions clearly state that projects that currently have other OHCS awards are not eligible, but I didn't notice a specific reference to my question above. Would a successful award from the Affordable Rental Housing Portfolio Preservation Pool preclude a project from applying for and receiving other OHCS funding sources?

Answer: It is OHCS's expectation that applicants requesting pool funds will be able to complete their projects without any additional OHCS funds. Applicants should be able to show that their projects can be completed with the funding they are requesting through the Pool Application without need for other OHCS funds. If your project's needs are more than can be covered by the available resources in the Combined Pools, you should consider our other funding opportunities instead.

We understand that wider economic conditions may require a reassessment of funding on a project-by-project basis. If, after a reservation of funds, a project has a gap in funding due to changes in the market, then that project's sponsors can request an exception to apply for additional funding.

Question: Can you help clarify the issue concerning combining OHCS programs with AWHTC?

Answer: When it comes to using AWHTC as a source for a larger project where you are seeking other OHCS funding, we don't allow for concurrent applications unless your project is in a declared disaster area. You must have already received a reservation for AWHTC before you apply for other competitive funding, such as LIFT funds. This is to prevent applicants from reporting funding sources in their applications they haven't been reserved.

Question: Are applicants for the preservation pool required to select a general contractor before submission of the full application?

Answer: Yes, sponsors are expected to have selected a general contractor to be included in the Development Team Capacity tab of the full application. You don't need to have finalized any contracts by time of application, but we would like to see that you have a full development team ready to go.

Question: Regarding NOFA 2022-2 and 2022-1, we have an issue with the application spreadsheet. Cell C18 on the Budget Sources tab is protected and won't allow entry of the AWHTC amount.

Answer: The cell was capped at \$2.75m as the upper limit. That was the old hard cap on AWHTC reservations. We changed the cap limit to the amount of AWHTC offered through the standalone AWHTC application for community-based applicants. That should solve your issue.

Question: Do we need to include the charges transmittal form from the full application when we mail in the application fee?

Answer: Yes. Our Finance Section requires the transmittal to properly process the fee. If sponsors do not include the transmittal form, it will delay the review process and potentially cause their projects to be prioritized lower for funding consideration.

Question: Which underwriting requirements should be followed for the preservation funds? The GPGM or the combined pool application instructions?

Answer: We will be using the underwriting guidelines as listed in the application. We are also always willing to work with sponsors should their investors require more strenuous standards.

Question: Are there any other due diligence reports (3rd party) required in the full application stage?

Answer: All of the due diligence reports required at application are included in the full app. Anything not listed there is not required.

Question: The below FAQ entry indicates that the Pool Preservation Funds are not intended to be leveraged with other OHCS offerings. Does that include 4% tax credits that have not yet been applied for and/or funded?

“Question: Can the funds available through this Affordable Rental Portfolio Preservation Pool NOFA (\$20K per unit) be used in conjunction with 9% LIHTC? If a project submitted funding through this NOFA, could it also use this source as grant leverage in their 9% application?”

Answer: The preservation funds available through the Combined Pool application are not intended to be leveraged with other OHCS offerings. The noncompetitive pools are meant for projects that only require the funds offered through the application. If this fund offering does not match the needs of your project, we will be offering a larger competitive Preservation NOFA in September. “

Answer: Yes, we are unable to offer any 4% LIHTC through the Preservation Pool application. Any preservation projects that require 4% should wait for the Preservation NOFA coming out in the Fall. If your project is already in the pipeline for 4%, you can still apply for funds through the pool app, but we have no new 4% availability.

Question: Would a PCA (physical condition assessment) work in lieu of a CNA (capital needs assessment) for the next stage of this application?

Answer: for noncompetitive funds, the project sponsor can submit a proposal on which parts of the CNA requirements they feel should not be required. Kevin Burgee, the agency Architect, will review the proposal and either agree to it or initiate further conversation. Sponsors can access the CNA requirements in the CDM and cross out sections they feel should be excluded and include that document with the proposal.

Question: Can you please clarify whether the \$2,500 pre-application fee covers the NOFA application fee as well? Or are two separate fees for each application stage required?

Answer: Each application requires a separate application fee.

Question: On the Sources tab, should we use the GHAP (cell C17) for the Preservation Pool request? There is no separate line for Preservation Pool sources.

Answer: We do have a spot for the preservation funds. It's in row 18 and you should be able to unhide the row to reveal it. Row 45 will also reveal the preservation line in that section of the tab.

Question: Should we be putting in an OAHTCs request with this Preservation Pool application, or can we assume that the OAHTCs have already been set aside with the Bond/4% application we already

submitted.

Answer: If you've already requested an allocation of OAHTC through your 4% application, then there's no need to make the request twice.

Question: Are the Preservation funds awarded as a grant or loan?

Answer: The Preservation funds are awarded as a grant.

Question: Does receipt of the preservation grant trigger prevailing wages in the construction/rehabilitation of the project?

Answer: Preservation funds are not federal funds, so Davis-Bacon isn't triggered. However, applicants will have to contact BOLI directly to determine whether they need to follow the State's prevailing wage law.

Question: Is there a time limit for when the existing HAP contract expires in order for the project to be considered "preservation"?

Answer: Any federal rent assistance must be expiring within 7 years at the time of application to qualify.

Question: Once we make it past the pre-application stage, what type of due diligence reports are required in the full application stage?

Answer: The complete list of required due diligence documents will be included in the workcenters and we'll be requiring the usual set of documents: confirmation of zoning and site control, scope of work, a CNA for rehab projects, an LOI for any OAHTC requests, and so forth.

Technical Advisory 01/24/22: Last week, we published our 2022 Combined Pool Application for a variety of development, rehabilitation, and preservation resources for Affordable Rental Housing. Unfortunately, the version that was published had key formatting errors in the Instructions Document for the application. Specifically, the section headings were not properly numbered and there were conflicting references to different sections. We have updated the document to address these errors and published a corrected version.

The updated Combined Pool Application Instructions Document can be found here:

<https://www.oregon.gov/ohcs/development/Pages/notice-of-funds-availability.aspx>

Questions/Answers:

1. The Combined Announcement and Instruction for Application Document does not contain section numbers which are referenced the document. Can you please re-issue the instructions with the section numbers. *We have updated the Application Instructions to include section numbers and have fixed the erroneous section number references.*
2. Additionally, are the section numbers in the grid below meant to align with sections listed in the Eligible Activities and Funding paragraph? *They are meant to align. The section numbers have been updated to match.*

Eligible Activities and Funding Available

Applicants may apply for only one eligible type of activity described in Sections 4, 5, and 6 below, and may request funding only up to the available funding per project for projects within that activity type. Please see the chart below for the funding available through this offering.

Sec.	Pool Name	4% Leverage	Funding Sources and Amounts
2	OAHTC	None	\$250M OAHTC
2	OAHTC Wildfire	None	\$200M OAHTC
3	PuSH*	None	\$10M Preservation, OAHTC**
3	Affordable Rental Housing Preservation	None	\$20M Preservation, OAHTC**
4	Manufactured Dwelling Park Preservation	None	\$25M Pres., OAHTC**

**For housing acquisition costs only. Must be a property included in the Statewide Inventory maintained by OHCS.*

***Up to 95% of permanent loan amount.*

3. Affordable Housing Preservation – The application instruction state, “The OHCS preservation funds provide grant funds to recapitalize and fund envelope improvements to existing affordable housing projects at risk of loss.” Could you clarify the allowed uses of the PuSH funds. I thought these funds were to fund acquisition of project with expiring restrictions. PuSH funds are meant for the acquisition of affordable housing at risk of expiry. The housing must be included in the PuSH database maintained by OHCS. Since PuSH funds are only for acquisition, any PuSH projects in need of other preservation funds can also apply for the other Preservation funds listed in section 3.

4. Is it possible to apply for both PuSH Preservation as well as Affordable Rental Housing Preservation Funding? It is possible to apply for both PuSH and general preservation funds for projects that have been identified as PuSH projects.

Question: Please clarify if the OAHTCs offered in this NOFA can be paired with other department resources that will be published at a later date (ie. 9% LIHTC or LIFT)? Or will there be additional OAHTC offered directly in those NOFAs?

Answer: The upcoming NOFAs will have OAHTC as an available funding source to request. The OAHTC Pool is primarily for projects that only need OAHTC from OHCS. The Preservation Pools can also request OAHTC as needed.

Question: Regarding the timing and use of LIFT with OAHTC, assuming an application for OAHTC is submitted this week, when will decision be made and how does this timing relate to the upcoming LIFT 4% NOFA?

Answer: OAHTCs are one of the funding sources available through the LIFT NOFA. Applicants should request OAHTCs through the LIFT application if applying for LIFT Rental.

Question: Can you clarify if the 2022 Combined Pool application applies only to preservation projects/OAHTC requests? The NOFA sections for 9% and other programs are not yet populated.

Answer: That's correct. The combined Pool app is a noncompetitive application for Preservation funds and OAHTC. The 9% LIHTC NOFA will be released later this year.

Question: Can the funds available through this Affordable Rental Portfolio Preservation Pool NOFA (\$20K per unit) be used in conjunction with 9% LIHTC? If a project submitted funding through this NOFA, could it also use this source as grant leverage in their 9% application?

Answer: The preservation funds available through the Combined Pool application are not intended to be leveraged with other OHCS offerings. The noncompetitive pools are meant for projects that only require the funds offered through the application. If this fund offering does not match the needs of your project, we will be offering a larger competitive Preservation NOFA in September.

Question: Will projects applying under the wildfire set asides have to be fully ready to go (Typical NOFA ready) or does the set-a-side have a lower readiness threshold?

Answer: Projects will need to be ready to proceed like a typical NOFA application. The idea of the Wildfire funds is to deploy them quickly for projects that are ready to start in areas where recovery is needed.

Question: Regarding the Affordable Rental Housing NOFA that was released as a part of the Combined Pool Application, it is clear from the Instructions what is needed for the Pre-App, but what specifically is needed for the actual application? Can you provide me access to Procorem to view a list that details what is needed?

Answer: The full application will be the usual pro forma application in excel with multiple tabs. We will be granting access to Procorem workcenters to every project sponsor that submits a pre-app. When submitting a full application through Procorem, sponsors will be expected to provide the usual supplemental documents: CNAs for projects involving rehab, site control information, site designs, development plans, and LOIs.

Agriculture Worker Housing Tax Credit (AWHTC):

Question: Is the receipt of the AWHTC application set upon complete upload of the application to Procorem or complete upload *and* receipt of payment?

Answer: We consider an application complete after we've received both the application and the application fee.

Question: Can LIFT 4% be paired with AWHTC? Is there still funding in the AWHTC program since it is first come first served?

Answer: Each NOFA has a list of OHCS funding sources that are being offered in that funding offering. For LIFT with 4%, it is OAHTC's, and Private Activity Bonds. And the 2022 standalone AWHTC Application states that anyone applying for AWHTC can't apply for other OHCS funds. As far as if there is still funding in the AWHTC program, the program manager is reviewing applications as they come in. Currently there are still funds available, but this could change at any point as applications continue to flow in.

Question: What restrictions come with the AWHTC credit?

Answer: The only restrictions attached to the AWHTC program credit is that the sponsor must set aside units preferred for agricultural workers and their families. Any restrictions from other OHCS funding sources must also be maintained.

Question: How is Agricultural Worker defined?

Answer: We follow the definition of Agricultural worker found in the authorizing statute. It can be accessed here: https://oregon.public.law/statutes/ors_315.163.

Question: Will all units in a property be covered by these restrictions or a subset of units?

Answer: The number of units restricted depends on the amount of tax credits you're requesting and there is a tab in the application to help determine that amount.

Question: How long do the restrictions attach to the property?

Answer: The restrictions run for 10 years.

Question: When does credit delivery start? How is it triggered? Are they all delivered at once, or over some time period?

Answer: The credit can be claimed after construction is completed. The project sponsor just needs to provide proof of final eligible costs, a certificate of occupancy from the county, and some "after" pictures. After verifying the information, the program manager will issue a Letter of Credit Approval and let DOR know you've been approved to claim the credit. The credits must be claimed over 10 years, but they can also be claimed up to 20% of the total credit amount per year as long as your tax burden is equal to or greater than that amount.

Question: Are these state or federal tax credits?

Answer: These are state tax credits.

Question: Can I expect access to a Procorem workcenter soon for the AWHTC application? Is there a sweet spot for how much we could apply for? For instance, if we requested over 50% of the available funds, is that too much?

Answer: We should have everything ready to start granting access to the workcenters by Monday, January 31st. There is an AWHTC calc page in the full app that lays out how many agriculture worker units we expect per amount of AWHTC requested. You can use that page to determine the amount of AWHTC you're comfortable requesting.

Question: Can we apply for both the AWHTC pre-application as well as the OAHTC pre-application?

There is some confusion around the use of AWHTC with other OHCS funding sources.

Answer: We've made an internal determination to allow an exception to the rule for the standalone AWHTC app to allow project sponsors in disaster areas to apply for AWHTC through the standalone app and also apply for other necessary funds through other NOFAs like the upcoming LIFT NOFA that will include disaster relief GHAP funds.

Additional Questions:

Question: Can we submit applications for the Land Acquisition Revolving Loan Program (LAP) now?

Answer: We will begin accepting pre-applications for LAP on April 1st.

Question: When will the Preservation NOFA be released? Where can I find more information about it?

Answer: Currently, it's slated for a September release and you can find out more about it by accessing the Housing Stability Council packet for the December 2021 meeting on our website here:

<https://www.oregon.gov/ohcs/hsc/Pages/2021-meeting-archives.aspx>

Question: An infographic in the December HSC meeting about the Preservation NOFA noted that there are set-asides for:

- 30% for federal rent assisted at risk of expiration
- 40% for portfolio at risk of expiration
- 30% for physical condition at risk of loss

Are those set-asides still accurate?

Answer: We plan to use the set-asides approved by Housing Stability Counsel in the Preservation NOFA.