

Housing Authority of Clackamas County

Metro Affordable Housing Bonds

Notice of Funding Availability

JANUARY 22, 2020

PROPOSALS DUE: 3:00 PM ON APRIL 6, 2020

SUBMIT PROPOSAL TO:

HACC Reception Desk

13930 S. Gain St.

Oregon City, OR 97045

(503) 650-3417

GENERAL INFORMATION

Overview:

In 2018, regional voters approved a \$652.8 million Metro Affordable Housing Bond for the creation of 3,900 affordable housing units within the urban growth boundary. The bond allows our region the opportunity to invest in the development of new housing resources for some of our most vulnerable and historically marginalized residents.

Recognizing the need and opportunity throughout the region, bond revenue is distributed based on assessed value of each of the three counties within the Metro district. This means that approximately 45% of homes created through the bond will be in Multnomah County, 34% in Washington County, and 21% in Clackamas County.

Bond revenues dedicated to Clackamas County are **\$116,188,094**. As a county without entitlement cities (cities with a population of at least 50,000), all bond resources will run through the Housing Authority of Clackamas County (HACC).

HACC will be the developer/owner of approximately 450 units of bond-financed housing and will use approximately \$63.9 MM or 55% of the total bond resources. The remaining balance, \$52.3MM or 45%, is available for projects sponsored by non-profit or for-profit developers throughout the eligible Metro boundary within the county.

Clackamas County production goals for Metro Bond funds are to:

- Develop or acquire approximately **812 new affordable housing units**
- Meet the needs of families by making at least 406 of the units two bedrooms or larger
- Meet the needs of the County's most vulnerable households by making at least 333 of the units affordable to extremely low-income households earning 30% or less of AMI. At least 200 of these units will be supported with rental assistance provided by HACC.
- Create affordable homes for households earning between 61 – 80% of AMI by using up to 10% of the funding. No more than 81 bond financed units will have rents at this level.

Available Resources:

- Capital Funding. HACC plans to release **\$40.67MM** or 35% of the total bond resources in this NOFA round.
- Project-based rental assistance. HACC will provide at least **125 project-based Section 8 (PBV) payment vouchers** to bond-funded projects that support units serving households with incomes at or below 30% of area median income. HACC anticipates a variety of project-based vouchers types will be available, including PBS8, Mainstream, and Veterans Affairs Supportive Housing (VASH) vouchers. HACC will work with developers to determine the appropriate voucher mix for each project. Please refer to the [HACC website](#) for current Fair Market Rents and payment standards.
- **HACC Conduit Bonds**. HACC may consider issuing conduit bonds for HACC-owned or other projects. These bonds have the advantage of lower fees than offered by other conduit bond issuers.

Information Session:

An information session for this NOFA will be held **on February 4, 2020** at the Clackamas Heights Community Room located at 13900 S. Gain St Oregon City, 97045, from **2:00 to 4:00 PM**. We encourage developers/sponsors planning to respond to this NOFA to attend.

Contact Person:

Devin Ellin, Senior Housing Developer
Housing Authority of Clackamas County
PO Box 1510, Oregon City, OR 97045
(503)650-3417 | dellin@clackamas.us

NOFA location and associated documentation: www.clackamas.us/metrohousing/NOFA

Timeline:

SCHEDULE	
NOFA Issued	January 22, 2020
Developer/Sponsor Mandatory Information Session	February 4, 2020
Applications Due by 3pm	April 6, 2020
Project Endorsement	July 2020

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I. **Background: Metro Affordable Housing Bond Program Work Plan and Clackamas County Local Implementation Strategy**

A. **Metro Affordable Housing Bond Program Work Plan**

On November 6, 2018, voters approved a \$652.8 million bond measure, directing Metro to fund affordable housing throughout the Metro region. In June of 2019, the Metro Council adopted the recommended program framework, as set forth in the Regional Investment Strategy: Affordable Homes for Greater Portland, which included recommendations for unit production goals, commitments to advancing racial equity, and implementation guidelines developed in collaboration with stakeholders, jurisdictions, housing providers and other partners. This Affordable Housing Program Work Plan ([Appendix A](#)) provides a comprehensive plan for implementing Metro's Bond Measure program.

In its efforts to achieve unit production targets, Metro is guided by the following four principles:

- **Lead with racial equity.** Ensure that racial equity considerations guide and are integrated throughout all aspects of the Program implementation, including community engagement, project location prioritization, tenant screening and marketing, resident and/or supportive services, and inclusive workforce strategies.
- **Create opportunity for those in need.** Ensure that Program investments serve people currently left behind in the region's housing market, especially: communities of color, families with children and multiple generations, people living with disabilities, seniors, veterans, households experiencing or at risk of homelessness, and households at risk of displacement. Incorporate commitments for tracking and reporting on Program outcomes for people of color and other historically marginalized groups.
- **Create opportunity throughout the region.** Ensure that Program investments are distributed across the region to (a) expand affordable housing options in neighborhoods that have not historically included sufficient supply of affordable homes, (b) increase access to transportation, employment, education, nutrition, parks and natural areas, and (c) help prevent displacement in changing neighborhoods where communities of color live today.
- **Ensure long-term benefit and good use of public dollars.** Provide for community oversight to ensure transparency and accountability in Program activities and outcomes. Ensure financially sound investments in affordable, high quality homes. Allow flexibility and efficiency to respond to local needs and opportunities, and to create immediate affordable housing opportunities for those in need.

B. Clackamas County Local Implementation Strategy

In addition to Metro's Work Plan and guiding principles, the HACC recently completed a thorough, community-focused process to develop its Local Implementation Strategy (LIS) ([Appendix B](#)). The LIS aims to sustain Clackamas County's livability, particularly for those most in need. It will guide the County's efforts as it works to create affordable housing using its allocation of Housing Bond proceeds. The LIS also outlines a commitment to furthering community goals of preventing displacement, advancing racial equity and inclusion, creating affordable housing options in locations where there are none, and helping address homelessness in the community. Production goals and priorities identified in the LIS include:

Production Goals: Develop or acquire 812 or more affordable housing units, of which:

- 406 will be family-sized units (defined as two or more bedrooms);
- 333 units will be for households earning 30% or less of area median income (AMI); and
- No more than 81 bond financed units will be reserved for households earning between 61 – 80% of AMI.

Priority Communities: Create housing access and opportunities for:

- Communities of color;
- Families, including families with children and multiple generations;
- Seniors;
- Veterans;
- People living with disabilities;
- Individuals exiting the foster care system;
- Households experiencing homelessness and/or facing imminent displacement.

Location Priorities:

- Preference for neighborhoods that have good access to transportation, grocery stores, school, commercial services, and community amenities;
- Accessible support services (including addiction services and mental and physical health services).

All proposals will be evaluated against the Threshold Requirements, Priorities, Preferences, and Additional Consideration criteria described below.

II. Threshold Requirements

Location	Projects must be located in Clackamas County and within the Metro Urban Growth Boundary.
Max Bond subsidy/unit	\$130,000 per unit
Project-based Section 8 Vouchers	For projects to qualify for Project-based Section 8 Vouchers (PBV), the projects must utilize a minimum of 8 vouchers. Units must be made available to households with adverse credit, rental, and legal histories, and very limited income.
Income Targeting	40% of the units in a project supported by Bond funding must be affordable to households earning 30% or less of area median income (AMI)*
Unit Size	50% of the units in a project supported by Bond funding must include two or more bedrooms**
Programming	Appropriate to building population(s). All units supported by Bond funding must be regulated at or below 80% AMI. All units supported by PBVs must serve households with incomes at or below 30% AMI.
Community Engagement	Project sponsors are required to hold at least two engagement sessions during predevelopment. These will help ensure developers are actively engaging with the community surrounding the proposed development and providing listening and feedback sessions to potential residents.
Screening	Units must be made available to households with adverse credit, rental, and legal histories, and very limited income. HACC may review and request revisions to the screening criteria and lease-up process.
Resident Services Plan	Resident Service Coordination that is appropriate to the level of need of the target population will be required at all projects. Resident Services will focus on eviction prevention, helping residents access services for which they may be eligible, empowerment services, and community building activities.
Supportive Services Plan	Projects serving high needs populations will require robust supportive services to ensure resident stability and positive outcomes. MOU's with service providers are expected. HACC will evaluate a project's target population and service plan to ensure it is appropriate and durable. HACC will approve resident service fees in project operating expense budgets.
Equity in Contracting & Workforce	A detailed plan to achieve at least 20% COBID certified subcontractor participation and 20% COBID certified professional services participation. Project sponsors will be required to provide documentation of subcontracting efforts and results. HACC strongly encourages architects, contractors, subcontractors and other bond project team members to involve Clackamas County workforce and businesses.
Sustainability	Compliance with Oregon Housing and Community Services standards
Accessibility	Incorporate Universal Design principals
Leveraging	Maximization of all non-Bond sources of funding including use of Low-Income Housing Tax Credit equity and conventional debt to the greatest extent feasible. (Proposals relying on competitive sources of funding, such as 9% LIHTC equity, FHLB, or other OHCS funding that have not been awarded at the time of proposal submission, may be deemed less competitive under this NOFA.)
Site Control	Demonstrated certainty of site control through fee simple ownership, executed long-term land lease, purchase option, purchase and sale agreement, or similar with closing date on the site no later than June 30, 2020; contingencies to closing reduce certainty of site control
Readiness to Proceed	Zoning is appropriate for proposed project development as evidenced by zoning letter from applicable jurisdiction. If zoning is not in place, provide a letter from applicable jurisdiction describing intended zoning and path/timeline for amendment.

* In cases where a project exceeds the threshold requirement for 50% 2br units, the threshold requirement for 40% of the units restricted at 30% AMI can be negotiated.

** In cases where a project exceeds the threshold requirement for 40% of the units restricted at 30% AMI, the threshold requirement for 50% 2br units, can be negotiated.

III. Scoring Criteria

Complete applications will be scored in the following categories. Maximum points in each category are noted. Sponsors must self-score their proposed project and include the completed scoring matrix shown below in the funding application (see Section V).

	Points Available	Self-Score
1. Subsidy Per Unit	15	
2. Location	25	
A. Proximity to Public Transit	5	
B. Proximity to Grocery or Drug Store	5	
C. Proximity to Medical Services, Library, or Senior Center	5	
D. Proximity to School	5	
E. Proximity to Parks, Recreation or Community Center	5	
3. Target Population and Project Attributes	30	
A. Income Targeting	5	
B. Unit Size	5	
C. Households with High Barriers to Housing	5	
D. Permanent Housing for Homeless Households	15	
4. Advancing Racial Equity	10	
5. Developer Experience and Capacity	10	
6. Readiness	10	
7. *Bonus Points* Community Housing Development Organization (CHDO)	2	
Total Possible Points	100 +2	

1. Amount of subsidy requested per unit (up to a total of 15 points)

While the Metro Bond resources are substantial, in order to meet the unit targets of the Bond, these funds will need to be blended with other public and private funding sources like 4% LIHTC equity, local resources, and bank loans. HACC has established a maximum bond subsidy of \$130,000 per unit. Points will be awarded for projects requesting less subsidy per unit. The lower the per unit request, the higher the score.

- Projects requesting \$100,000 per unit or less will receive 15 points
- Projects requesting \$100,001-\$115,000 per unit or less will receive 10 points
- Projects requesting \$115,001-\$125,000 per unit or less will receive 5 points
- Projects requesting \$125,001-\$130,000 per unit or less will receive 0 points

2. Location (up to a total of 25 points)

HACC looks to support projects in neighborhoods with good access to transit (e.g. bus, rail, bike paths, and pedestrian corridors), jobs, parks and open space, quality schools, commercial services and amenities, and provide the opportunity to create inclusive mixed-income neighborhoods.

A. Proximity to Public Transit (up to 5 points)

- Within ½ mile of multiple bus lines or MAX station (5 points)
- Within ¼ mile of a single bus line or shuttle (3 points)
- Within ½ mile of a single bus line or shuttle (2 point)

B. Proximity to Grocery or Drug Store (up to 5 points)

USDA Food Desert data from: <http://www.ers.usda.gov/data-products/food-access-research-atlas/go-to-the-atlas.aspx#.Uw9-EOOwI5I>

- Full service grocery or drug store located within ½ mile (5 points)
- Full service grocery or drug store located within 1 mile (3 points)
- Not located in a USDA Food Desert (2 points)

C. Proximity to Medical Services, Library, or Senior Center (up to 5 points)

- Available within ½ mile (5 points)
- Available within 1 mile (3 points)
- Available within 2 miles (2 points)

D. Proximity to School (up to 5 points)

- Within ½ mile (5 points)
- Within 1 mile (3 points)
- Within 2 miles (2 point)

E. Proximity to Parks, Recreation or Community Centers (up to 5 points)

- Within ¼ mile of a park, recreation center, or community center (5 points)
- Within ½ mile of a park, recreation or community center (2 points)

3. Target Population and Attributes (up to a total of 30 points)

In order to meet unit bedroom size and affordability goals, HACC looks to support projects that include units with two or more bedrooms and rents at or below 30% AMI. During the listening phase, HACC received reminders of the need for senior housing, family housing (to include three and four-bedroom units), housing accessible to high needs populations, housing that is compliant with the American with Disabilities Act (ADA), and housing for individuals who are homeless or at risk of homelessness.

A. Income Targeting (up to 5 Points)

- Points will be given based on percentage of rents affordable at lower AMI levels. Percentages are rounded up to the next whole number.

Percentage of units above threshold requirement affordable at or below 30% AMI:	Points
10% and above	5
8-9%	4
6-7%	3
3-5%	2
1-2%	1

B. Unit Size (up to 5 points)

- Points are awarded for the number of units with 2 or more bedrooms above the threshold requirement.
 - 1 point will be awarded for each 5% of units that have 2 bedrooms **above the threshold requirement.**
 - 1 point will be awarded for each 5% of units with 3 bedrooms or larger

C. Households Facing High Barriers to Housing (up to 5 points)

- One point awarded for each 5% of the affordable units set aside for households facing high barriers to housing, up to a maximum of 5 points. “High Barrier” populations means categories of people with particular needs related to housing, including but not limited to veterans, elderly, people with the presence of a disability, previously incarcerated persons, and survivors of domestic violence.
- To receive points, the Resident Services Plan must demonstrate how essential supportive and social service needs of the population will be provided and funded. Providing accessible units will not in and of itself be sufficient to score points.

D. Permanent Housing for Homeless Households (up to 15 points)

- Projects with units set aside for [homeless households](#) must offer sufficient supportive services for the population served and show sufficient commitments for services. Services must be offered voluntarily for the duration of tenancy. When Project-Based Vouchers are awarded, units must be filled from Clackamas County’s Coordinated Housing Access (CHA) system in collaboration with the HACC’s waitlist process. To receive points, the Supportive Services Plan must demonstrate how essential supportive and social service needs of the population will be provided and funded.
- One point awarded for each 5% of affordable units set aside for homeless families or individuals, up to a maximum of 15 points.

4. Advancing Racial Equity (up to a total of 10 points)

People of color struggle disproportionately with unaffordable housing, displacement and homelessness. HACC is committed to addressing this inequity by prioritizing opportunities to serve historically underserved communities, removing barriers to fairness in representation, opportunity, and access and providing equal opportunity for very low-income families of all ethnic backgrounds to experience freedom of housing choice.

- Points will be awarded based on comprehensiveness, specificity, quality of engagement, and quality of services, according to the following criteria. Up to 2 points per answer. Include responses in the Equity Plan referenced in Section V. **Projects must meet a minimum of 5 points in this section to qualify for project funding.**
 1. Tell us about historically underserved communities in your project area including demographics and other factual data in your response.
 2. How have you connected to this community(ies) in planning for this project?
 3. How do you plan to ensure that these communities are aware of this housing opportunity?
 4. What barriers do you anticipate these communities encountering in accessing housing? What is your plan for mitigating identified barrier to access?
 5. How will you serve this community(ies) through building operations? Please attach any actionable MOUs with service organizations.

5. Developer Experience and Capacity (up to 10 points)

The development team’s experience and capacity should match the scope and scale of the proposed development. Complete the narrative questions and tables of requested information. Include responses in the Development Team Summary referenced in Section V. Points will be awarded based on the experience and capacity of the development team.

1. List the five (5) most recent projects you have **completed** in the past five years. (Include project name, city, target population, and funding sources.)
2. List all housing projects **under development**. (Include project name, city, target population, funding sources, and estimated completion date.)
3. For the proposed project, list below the names of agency staff members and/or the third party firm assigned to each task.

Position Name	Staff Person Name/Title or Contracted Firm Name	Years of Experience Developing or Managing Multi-family Housing
Executive Director/Owner		
CFC/grant application writer		
Project Developer		
Development Consultant		
Construction Manager		
Asset Manager		
Compliance Manager		
Architect		
General Contractor		
Other		

4. Describe agency staff member experience leading construction development of projects of similar (or larger) size and scope such as mid-rise versus high-rise, wood frame versus steel, and new construction versus rehabilitative construction. If applicant staff experience in affordable housing development and operation is limited, discuss how this concern will be mitigated (i.e. whether you will partner with an experienced consultant or organization). If using a consultant, indicate how long the consultant will be involved in the development process.

6. Readiness (up to 10 points)

Points will be awarded according to the degree to which the proposal demonstrates readiness to proceed.

- Maximum points are awarded for sites that have obtained entitlements (obtaining building permits is not necessary to score points).
- Projects that have submitted their application for entitlements will be eligible for up to 5 points.
- Projects that have submitted an executed MOU with a service partner to provide services to residents at the property will be eligible for 1 point. To receive points, in addition to the MOU, the Resident Services Plan must demonstrate how essential supportive and social service needs of the population will be addressed.

7. CHDO bonus (up to 2 bonus points)

A Community Housing Development Organization (CHDO) is a private nonprofit, community-based service organization that has staff with the capacity to develop affordable housing for the community it serves.

- Two bonus points will be awarded to qualifying CHDOs.

IV. Additional Considerations

In addition to the threshold requirements, competitive scoring criteria, and development priorities, development teams should keep in mind the following as they are crafting their proposals:

- **Project-based Section 8 Vouchers:**

- Projects must be an eligible housing type for PBV assistance (24 CFR 983.53 and 983.54) and meet accessibility requirements in accordance with the regulations implementing Section 504 of the Rehabilitation Act of 1973. Projects must also complete an Environmental Review under the National Environmental Policy Act (NEPA), a Subsidy Layering Review (SLR) (24CFR 983.55, FR Notice 6/25/14), and are subject to HUD Section 3 hiring goals and Davis-Bacon labor standards. Projects must be aware of the cap on the number of PBV units allowed in a project based on 24 CFR 983.56 and PIH Notice 2017-21. HACC will limit approval of sites for PBV housing in census tracts that have poverty concentrations of 20% or less.
- For projects using PBVs, the projects must utilize a minimum of 8 vouchers.
- All units supported by PBVs vouchers must serve households with incomes at or below 30% of area median income and made available to households with adverse credit, rental, and legal histories.
- Projects completing all applicable HACC and HUD reviews may then execute a Section 8 Project-Based Voucher Housing Assistance Payments (HAP) contract with HACC. The term of the HAP contract for any contract unit may not be less than one year nor more than 20 years. The term of the PBV HAP Contracts desired by the requesting party must be stated in this proposal and will be negotiated on a case-by-case basis.
- A project may utilize a site-based waiting list to select applicants for PBV assisted units and HACC reserves the right to require local preferences to determine order of selection from an owner administered site-based waiting list.
- New Construction Site and Neighborhood Standards must be met (24 CFR 983.57(e))
- Existing Acquisition or Rehabilitated Housing Site Neighborhood Standards must be met (24 CFR 983.57(d))
- Projects that request PBVs should understand that the Fair Market Rents shown in on the HACC website (www.clackamas.us/housingauthority/section8.html) are published by HUD annually and are the basis for which public housing agencies set their voucher payment standards. It is the HACC Voucher Payment Standard that establishes the maximum approvable contract rent for a PBV program unit. The proposed project's PBV rent to owner must not exceed the lowest of the following amounts:
 - An amount determined by the PHA, not to exceed applicable payment standard for the unit bedroom size minus any utility allowance;
 - The reasonable rent; or
 - The rent requested by the owner.

- **Financial metrics:**

- Sufficient hard and soft costs contingencies and reserves should be embedded in each proposal to ensure that the project could be completed without any additional Bond funds.
- Projects should incorporate adequate operating expenses on a per annum basis to serve the targeted population.
- Project proformas should assume that income from PBV units will be set at 60% AMI.
- Projects should balance amenities (community rooms, gathering space, etc.) and durability (such as unit finishes) with unit costs/subsidy to ensure the population served can reside long term in the affordable units.
- Project evaluations will emphasize expediency and cost efficiencies in all aspects of building design, construction, and operations. Innovations that can reasonably be expected to result in demonstrated lower costs are encouraged.
- Cost Controls: All projects should demonstrate average unit costs not to exceed limits prescribed by Oregon Housing and Community Services (OHCS).
- In an event of default, rents for Bond-funded units may not exceed 60% AMI. No exceptions.
- HACC strongly discourages manipulation of pro forma assumptions to produce a desired outcome, such as lowering expenses to produce more favorable net operating income.
- New Construction units and acquisition/rehab projects less than 10 years old receiving Metro Bond funds will be regulated to a 60-year affordability period. For acquisition/rehab projects that are more than 10 years old, HACC may consider a shorter period of affordability, but no less than 30 years.

- **Equity:**

- Proposed project must show it can meet the 20% COBID hard and soft cost goals. In addition, proposers must consider how equity is addressed throughout their proposals to include:
 - How diversity and inclusion is applied in the organization, including its board.
 - The provision of culturally responsive and culturally specific services.

These and other related topics should be captured in development teams' Equity Plan (see Section V, Application Requirements)

V. Application Requirements

Development teams must submit the following minimum application materials including the completed application form ([Form B](#)). Total combined page limit for the Project Narrative (#3) and Development Team Summary (#4) is 15 pages. Page limit for the Equity plan (#7) is 6 pages. Aside from financial documents, application materials should be single-spaced, 1-inch margins, with no smaller than 11-point font.

1. Sponsor Cover Page ([Form A](#))
2. Funding Application ([Form B](#))
3. Completed self-score matrix
4. Project Overview Narrative that includes:
 - A. Type of project (new construction, acquisition/rehab)
 - B. Description of project including number and type of units, number of floors, construction type, floor area ratio, height, key building and site amenities, and any other key design elements (if any), and how project meets the LIS and Bond Framework goals.
 - C. Description of the target population, income mix and lease-up plan, including:
 - i. Description of resident or other programming including resident services.
 - ii. Description of plan for outreach, marketing and lease-up to priority populations, including plans to implement low barrier screening, to promote accessibility to households with adverse credit, rental, and legal histories and very limited income. Access may be achieved through partnerships with referring service providers, innovative screening and property management strategies, and/or other approaches that remove barriers to access.
 - D. Supportive Services Plan (2-4 pages expected) - **only for projects proposing unit(s) for high barrier or homeless populations**: A supportive services plan to serve the priority population(s) that addresses:
 - i. Overview of the target population and needs, and how service team's approach and services offered are responsive and effective for meeting these needs. This includes delivery of culturally responsive and/or culturally specific services, methods of assessing and providing services to residents, and plans for supporting tenants and the housing community when tenants are experiencing a crisis.
 - ii. Service team's overall capacity to support project service design, planning and services operations oversight in addition to providing needed direct services in the project. Include description of how community relationships and partnerships will be leveraged to strengthen services. Include any MOU's with service providers.

- iii. Types and level of services to be offered, including anticipated FTE by service type.
 - iv. Brief overview of anticipated services outcomes for target population, including racially equitable access and outcomes.
 - v. A marketing and lease-up plan that demonstrates: capacity to reach the target population through coordinated access; how the lease-up process will ensure equitable access for people of color in the priority population(s).
 - vi. Budget and sources of funding for services, including both funding through this NOFA and leveraged sources. Brief overview of anticipated services outcomes for target population, including racially equitable access and outcomes.
- E. Description of key financial assumptions and financing terms, particularly as those relate to contingent, at risk or otherwise uncommitted outside funding sources. Please include assumption on operating costs as well as provision of supportive services.
- F. Indicators of cost-efficient design, construction and operations.
- G. Indicators and description of Universal Design concepts applied in the project.
- H. Confirmation of Davis Bacon wage assumptions and/or a BOLI wage determination letter for construction as applicable.
- I. Description of the green/sustainable building or operations features.
5. Development Team Summary: Development team qualifications and experience, including ownership entity and its relationship to other development team members. The summary must also include a description of the development team’s past use of or familiarity with rules, regulations, and requirements of the specific funding sources being requested. **Teams unable to satisfactorily demonstrate use or familiarity may be eliminated from consideration.**
 6. Preliminary Budget/Pro Forma ([Form D](#)): including projected sources and uses, income and expense breakdown, and 30-year cash flow projections. **Use of OHCS pro forma in MS Excel format is required (not PDF).**
 7. Readiness: fill out, to the greatest extent possible, Proposed Project Schedule ([Form E](#)).
 8. Equity Plan
 9. Draft Affirmative Fair Housing Marketing Plan ([Form F](#))
 10. Sponsor Statement of Financial Capability ([Form C](#))
 11. Organizational financial statements for last two years and a Schedule of Real Estate Owned. Please clearly mark “confidential” if these financial statements are to be kept confidential in the event of a public records request.

All pages in the application must be numbered.

Design/architecture is NOT required and is only encouraged to the minimum extent necessary for development teams to comply with other submittal requirements.

Signed and dated proposals must be submitted by **3:00 p.m. on April 6, 2020** to be considered responsive.

Submit three (3) hard copies of completed application and documentation, with copies of all documents on a flash drive (NO FAXES PLEASE) to:

Devin Ellin, Senior Housing Developer
c/o HACC Reception Desk
13930 S. Gain St., Oregon City, OR 97045
(503) 650-3417 | dellin@clackamas.us

VI. Review and Selection Process

Upon receipt, all applications will be reviewed for adherence to this NOFA's application requirements and scoring criteria. The selection process may take 10-15 weeks and include the following steps:

1. HACC Concept Endorsement: 45 - 60 days

- A. Threshold Review – HACC Staff
- B. Technical and Financial Feasibility Review – HACC staff, HACC Housing Advisory Board, and Ad-Hoc Evaluation Review Committees
- C. HACC selects project for approval and forwards decision to Metro

2. Metro Concept Endorsement: 30 - 45 days

- D. HACC staff, in conjunction with Metro staff, will present the project to Metro for endorsement by the Metro COO. Metro will review the project for conformance to the adopted Local Implementation Strategy.
- E. Metro approves concept endorsement

HACC and its partners at their sole discretion may employ the following selection process and evaluation criteria in recommending projects for an award.

Projects will be evaluated and ranked based on at least the following:

1. Alignment with the LIS:
 - Need: population, location
 - Impact: alignment of resident services, fair housing marketing plan and outreach plan to LIS goals and priorities
2. Investment Requirements
3. Scoring Criteria
4. Preferences
5. Additional Considerations
6. Qualifications and experience of the Development Team
7. Reasonableness and feasibility of all financial materials submitted including the project budget and proforma
8. Readiness to proceed with the project and assumptions regarding the project schedule.
9. Content, quality and reasonableness of all equity related submissions including the Equity Plan
10. Content and quality of the proposal, the Project Narrative, all other required materials and materials submitted voluntarily by the Development Team

VII. General Conditions

This NOFA is not a solicitation of competitive bids. Failure to abide by these General Conditions is grounds for disqualification. HACC by this NOFA specifically reserves the right in its sole discretion to determine which proposals best serve the public good, and to:

- A. Revise the solicitation, evaluation, or selection process including extending the deadline or canceling without selecting any projects.
 - B. Waive informalities and irregularities in the proposals received in response to this NOFA.
 - C. Disqualify without recourse or appeal any or all proposals.
 - D. Reject any or all proposals.
 - E. Determine the timing, arrangement and method of any presentations.
 - F. Verify and investigate the qualifications and financial capacity of the development team, and any of the information provided in the proposal.
 - G. Request best and final offers.
1. Every effort has been made to provide current and correct information; however, HACC makes no representation or warranty with respect thereto.
 2. All proposals received shall become the property of HACC and considered an official public record subject to inspection by the public in accordance with Oregon's Public Records Law (ORS Chapter 192). Entities are advised that confidential financial information, including the Sponsor's Statement of Financial Capacity, should be clearly labeled and submitted separately from the remainder of their proposal (both paper and digitally). Similarly, if any entity responding to this solicitation believes that a specific portion of its response constitutes a "trade secret" under ORS 192.345(2) and is, therefore, exempt from disclosure, the entity must clearly identify that specific information as a "trade secret" and submit it together with the confidential financial information. Identification of information as a "trade secret" does not necessarily mean that the information will be exempt from disclosure. HACC will make the determination of exemption from disclosure based on the nature of the information and the requirements of the Oregon Public Records Law. If an entity disagrees with HACC's determination that an exemption does or does not apply, that entity is exclusively responsible for defending the entity's position concerning the requested information from any party requesting the disclosure.
 3. Restrictions on communication. Every effort has been made to include herein all the information necessary to prepare and submit a responsive proposal to this NOFA. However, in the event additional information is desired, or if you have a question about any of the information or requirements contained in this NOFA, direct your questions to:

Devin Ellin, Senior Housing Developer
Housing Authority of Clackamas County
PO Box 1510, Oregon City, OR 97045
(503) 650-3417 | dellin@clackamas.us

4. During the course of this NOFA, development teams are cautioned not to undertake any activities or actions to promote or advertise their proposals except in the course of HACC-authorized presentations; or to make any direct or indirect (through others) contact with review committee members (if named), staff members of the County, HACC or other funding partners. Development teams may only initiate contact with the person named in #3 above who will assess inquiries and determine further actions, if any.
5. HACC will not hold “one-on-one” meetings with any development teams during the evaluation process except as part of a scheduled interview or presentation process involving all or a “short list” of development teams. HACC may, however, ask individual development teams clarifying questions or obtain additional information about some specific point of a proposal.
6. HACC accepts no responsibility or obligation to pay any costs incurred by any potential or eventual development teams in the preparation or submission of a proposal; or in complying with any subsequent request by HACC for information or participation throughout the evaluation process.
7. Funded projects will be required to:
 - A. Comply with Metro-required 60-year affordability agreement and annually submit compliance reporting as specified in agreement.
 - B. Financial Documentation: Current financial statements and recent financial audits (if available) in sufficient detail for HACC to analyze the overall health of the organization, and the performance of other real estate owned.
 - C. Support letters from all partner service providers must be submitted for services to be considered in scoring.
 - D. Additional information regarding project criteria is contained within the Appendices.
8. Mandatory Information: Development teams may be eliminated from consideration if a representative of the team does not attend the Mandatory Developer Information Session.
9. Once an application has been submitted, no action may be taken on the property, bid solicited, or contract entered into until a HUD environmental review which complies with the laws and authorities of the National Environmental Policy Act (NEPA) is conducted. Failure to do so may result in a “choice limiting action” and render the project ineligible for funding.

All substantive questions and answers (FAQs) as well as formal Addenda will be posted to the HACC website page: www.clackamas.us/metrohousing/NOFA

VIII. Forms and Appendices

FORMS	LOCATION
Form A – Sponsor Cover Page	Form A
Form B - Funding Application	Form B
Form C - Sponsor Statement of Financial Capability	Form C
Form D - Pro Forma	Form D
Form E - Proposed Project Schedule	Form E
Form F - Sample Screening Criteria	Form F

APPENDICES	LOCATION
Appendix A – Metro Affordable Housing Bond Program Work Plan	Appendix A
Appendix B – Clackamas County Local Implementation Strategy	Appendix B