

Request for Proposal for Project-Based Vouchers

Thank you for your interest in Orange County Housing Authority (OCHA) Project-Based Vouchers for your project. To apply, complete and submit this Request for Proposal (RFP) package.

What is OCHA's Project-Based Voucher Request for Proposal (PBV RFP)?

This Request for Proposal (RFP) for OCHA's Housing Choice Voucher Section 8 Project-Based Voucher (PBV) program provides an opportunity for projects that meet OCHA agency priorities and qualify under program eligibility to apply for federally funded PBVs to contribute to the project's financial health and offer tenant stability. OCHA's Housing Choice Voucher (HCV) program manages the PBV RFP selection process.

PBV RFP Application Instructions

By submitting this RFP application to OCHA, applicants agree to comply with relevant U.S. Department of Housing and Urban Development (HUD) regulations and address OCHA priorities as outlined in the application package. An application checklist can be found on page 39 and includes a list of all the required components of the application.

Submission Instructions

Complete applications, including required supporting documents, must be submitted by 11:59 PM on Friday, December 12th, 2025, to OCHA by email:

Email to hcv@orangecountync.gov with the subject line "PBV RFP Submission_ [Project Name]."

Only completed applications will be considered.

Questions and Support

Applicants may contact OCHA at hcv@orangecountync.gov with additional questions.

Resources

Additional guidance can be found on [OCHA's website](#)

Federal (HUD) PBV Program Regulations can be found at [24 CFR Part 983](#).

Note: This application is for the sole use of responding to OCHA's request for Project-Based Voucher Proposals. Projects conditionally awarded PBV units under this RFP are required to comply with PBV requirements as well as any OCHA loan or preservation program regulatory agreement, marketing, and any other requirements that apply to the project.

RFP Fiscal Year 2025 Schedule

OCHA's Fiscal Year is from July 1 to June 30. This schedule outlines the expected timeline for the current RFP submission cycle.

Submission Deadline	Friday, December 12, 2025 by 11:59 PM
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Anticipated Selection Dates	January 2026
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Pre-Submission Conference Dates	Wednesday, November 12, 2025 at 10:00 AM Friday, November 14, 2025 at 1:00 PM (Applicants should attend one session)
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Instructions

- A separate complete application must be submitted for each project (as defined in HUD's PBV regulations listed below) for which Project-Based Voucher (PBV) assistance is requested (see [PBV Project Eligibility](#) below).
- OCHA's PBV RFP application in PDF form must be completed. Any additional narrative responses and/or supporting documents submitted as attachments in Word, Excel or PDF must be clearly numbered and labeled to correspond to the relevant question and/or Appendix in the application.
- OCHA will not accept revisions to any application after the application deadline.
- Commitments made in this PBV RFP by applicants must remain unchanged until Housing Assistance Payments (HAP) contract execution and lease-up. OCHA reserves the right to rescind a PBV award if OCHA is made aware of significant changes to the project from the information provided in RFP response.

PBV Project Eligibility

- Only housing that meets HUD's project definition will be considered for a PBV award:
 - A "project" is defined by HUD regulations¹: "A project can be a single building, multiple contiguous buildings, or multiple buildings on contiguous parcels of land. 'Contiguous' in this definition includes 'adjacent to,' as well as touching along a boundary or a point."² Multiple buildings meeting this definition of a single project, including projects located directly across the street from one another, must submit a single application to be considered.
 - Applicants seeking PBV assistance for projects that do not meet this definition, i.e. are scattered across non-contiguous parcels, including buildings that are diagonally across or down the street must submit multiple applications and will be considered as multiple, separate projects.
- Only applications requesting five (5) or more PBV units will be considered.
- Any applicant whose owner or project principal is listed as excluded from Federal Procurement and non Procurement programs on the U.S. General Service Administration list of parties is not eligible to submit a PBV RFP application.

Resources

- Frequently Asked Questions were included with application materials and can be provided again upon request to hcv@orangecountync.gov.
- Federal (HUD) PBV Program Regulations can be found at [24 CFR Part 983](#).

¹ [24 CFR § 983.3](#)

² To test if buildings across the street from one another are contiguous: "if you were to draw a line across the street, perpendicular to the centerline of the street, and the line touches both properties, then they will be considered as contiguous". Projects located directly across the street from one another meet this definition but projects diagonally across the street from one another, down the block or catty-corner do not.

PBV Resident Eligibility

- In order to be eligible for PBV assistance, all residents of proposed PBV units, including existing and future tenants, must meet the requirements below. For future tenants OCHA will screen applicants for eligibility before they are approved to move into the project and before subsidy is paid to owner.
- Residents must apply for assistance, complete all required forms, and be approved for tenancy by OCHA.
- Residents must reside in units that are consistent with OCHA's subsidy standards, listed below. Residents cannot be overhoused (defined as a unit with more bedrooms than the household is entitled to according to the allocated number of bedrooms) or overcrowded (defined as having more than two people in the household per room (including the living room)).

Subsidy Standards Chart

Number of Household Members	Number of Bedrooms (no household members are partnered)	Number of Bedrooms (household members are partnered)
1	1	1
2	2	1
3	3	2
4	4	2-3
5	5	3-4

- Total household income must be at or below 50% of the Area Median Income (AMI). For current AMI values and income limits, visit OCHA's website.
- Once accepted into the PBV program, residents are expected to pay at least 30% of their adjusted income toward the OCHA-approved contract rent plus any utility allowances (known as the gross rent). If 30% of the adjusted household income covers or exceeds the entire gross rent, the household will not be eligible for assistance.
- If residents of a proposed PBV unit are currently receiving any rental assistance, they must be advised of their rights and differences in the program and consent in writing to give up their current assistance and switch to PBV for that unit to receive PBV assistance.

Section 1 - Applicant Information

Applicant Name--*must be the legal entity that will appear on the PBV HAP contract, such as the fee owner, beneficial owner, or ground lessee of the project*

Sponsor Name (if different than the Applicant name)

The Sponsor is the parent of the underlying company, individual or organization with a controlling interest in the ownership structure of the project.

Applicant Address

City

State

Zip Code

Applicant Contact Name

Email Address

Phone

Section 2 - Project Information

Project type: OCHA accepts applications for Project-Based Vouchers for three types of projects: Newly Constructed, Existing and Rehabilitated Housing

1). Please read application instructions carefully. Definitions of each project type are provided below¹. Select below the appropriate project type:

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- Newly Constructed: Housing units that do not yet exist and are developed after the date of selection for use under the PBV program.**
- Existing: Housing units that already exist by the submission deadline and that fully comply with Housing Quality Standards (HQS) on the PBV award date. Full compliance is defined as 100% of PBV units and public areas passing HQS inspection.** *Applicants may apply for PBVs for existing properties only where there is no planned substantial improvement for the project from the PBV RFP submission date through the first two years of the HAP contract¹.* If all of the criteria listed above are not met, the application must be submitted under the Rehabilitated Housing option. Applicants cannot swap or reduce the number of units to meet the Existing definition.
- Rehabilitated Housing: A project where proposed contract units exist by the submission deadline, but that does not meet the criteria described above under the definition of "Existing Housing".**

For all Rehabilitated Housing projects, *Appendix B: Additional Information for Existing and Rehabilitated Projects* of this application must be completed and submitted as part of the application package by the submission due date.

¹24 CFR § 983.3

²*Newly Constructed and Rehabilitated project owners must execute an Agreement to Enter into Housing Assistance Payment contract (AHAP). AHAPs are signed after selection, once the project has met subsidy layering requirements. These projects may not begin construction until after an AHAP has been executed. Please see *Appendix A: Additional Information for Newly Constructed and Rehabilitated Projects that have Already Started Construction* for more information.

Section 2 - Project Information

1) Proposed PBV Project Name

2) Name of Proposed Developer

3) Does the developer have 501c3 nonprofit status?

Yes No

If yes, attach a status letter for confirmation.

4) Proposed Management Company/Agent

5) Proposed Social Service Provider (if offering supportive services)

6) Are any of the partners listed above (developer, management company, service provider) entities with certified Minority and Women-Owned Business Enterprises (M/WBE) status?

Yes No

If yes, attach current certifications.

7) Do any of the partners on the project have any past Project-Based Voucher or other Project-Based Rental Assistance experience?

Yes No

Section 2 - Project Information

8) Number of Buildings in Project¹

9) PBV Addresses: complete the table below.

Project Address(es)	City, State and Zip Code	Block and Lot Number

10) Is the project for which this application is being completed defined in a different way than HUD's definitions for financing purposes? If yes, provide the name of the larger project and any additional details.

Yes No

¹ If the development has multiple buildings, refer to the definition of "project" provided in the [PBV Project Eligibility](#) section. If the development meets this definition, enter information on all buildings (such as addresses and block and lot numbers) in this application. If the development does not meet the definition, multiple applications are necessary.

Section 2 - Project Information

11) Populations Served. Indicate if any PBV units will be used to serve any of the following populations, some of which are designated as Special Purpose Vouchers¹:

- Homeless Households²
- Families who are offered supportive services by the project
- Elderly Households (defined as the head, co-head or spouse of head of household is age 62 years or older)
- Veterans³
- Youth aging out of foster care³
- Families reunifying with their children under the foster care system³
- People with Disabilities³
- Justice Involved Individuals
- Existing/Rehabilitated projects only:* PBV will alleviate rent burden for existing tenants.
- Existing/Rehabilitated projects only:* Some or all proposed PBV units are vacant (indicate the number of vacant units):
- None of the above

Note: commitment to serve selected populations is binding at the HAP contract execution. Tenant Selection plan must include these populations and be consistent with any applicable marketing guideline requirements that apply to the project.

¹ If the application commits to serve any of these populations (homeless, veterans, disabled, youth aging out of foster care and families reunifying with children under foster care) OCHA may designate Special Purpose Vouchers for your project. Special Purpose Vouchers are designated for certain populations and may include partnership between OCHA and other agencies for tenant referral and service provision.

² Homeless households as defined at <https://www.ecfr.gov/current/title-24/subtitle-B/chapter-V/subchapter-C/part-578/subpart-A/section-578.3>

³ Tenants with these types of vouchers, described below, must be provided with appropriate social/supportive services as determined by OCHA.

- Veterans Affairs Supportive Housing (VASH) vouchers are designated for homeless veterans with case management and clinical services provided by the Department of Veterans Affairs.

- Mainstream vouchers are designated for households with an adult with a disability who is aged 18-61.

- Family Unification Program (FUP) vouchers are designated for youth aged 18-24 who are aging out of, or who have recently aged out of, or who have left foster care; and families in the child welfare system who are reunifying with their child(ren); or who are at risk of children being placed in foster care are impacted by their housing instability. FUP tenants are referred in coordination with the Administration for Children's Services (ACS).

Section 2 - Project Information

12) Number of Requested Units

Federal PBV regulations ([24 CFR § 983.54](#)) states the number of approved PBV units in a project cannot be more than the greater of 25 units or 25% of the total units in a project. Projects in an area where vouchers are difficult to use¹ may be approved for the greater of 25 units or 40% of the total units in the project.

Requests for additional PBVs must be for units designated to serve households where the head, spouse or cohead of household is elderly (defined as aged 62 or older), eligible for Family Unification Program (FUP) vouchers (as defined in footnote 3 on page 9) or for residents who are eligible for supportive services². The project must make supportive services available to all PBV-assisted families in the project, but the family may not be required to participate in the services as a condition of living in the excepted unit. Supportive services include: Case management; Employment skills development and job training; Family support services; Parenting skills, childcare skills, family budgeting and similar related services; Housekeeping and homemaking activities; and Other services designed to help the recipient live in the community as independently as possible.

These units are considered “excepted” units. For a unit to be considered excepted, it must be occupied by a family who qualifies for exception. A project is not limited to a single exception category but may include excepted units from any of the exception categories.

Please complete the Bedroom Distribution Chart below:

Bedroom Distribution Chart

Total units in the project _____ Total Units for PBV _____

	SRO ³	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	Total
Total # of Units in the Project (PBV and non-PBV)								
Total # of Proposed PBV Contract Units								
Proposed Contract Rent (per month) ⁴ 1								
Total # Excepted Units (if applicable) ²								

For projects with excepted units, check applicable reason(s) for exceptions:

- Elderly (head of household or spouse or cohead is 62 or older)
- Household is offered supportive services
- Family Unification Program (FUP) participants

¹ Areas where vouchers are difficult to use are defined as: A census tract with a poverty rate of 20 percent or less, as determined by HUD; A ZIP code area where the rental vacancy rate is less than 4 percent, as determined by HUD; or A ZIP code area where 90 percent of the Small Area FMR is more than 110 percent of the metropolitan area or county FMR.

² [24 CFR § 983.54](#)

³ SRO is defined as " A unit that contains no sanitary facilities or food preparation facilities, or contains either, but not both, types of
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facilities." For more information, view [Understanding SRO](#).

⁴ [Fair Market Rents \(FMR\) as set by HUD](#)

⁵ In the chart, the number of "excepted units" is the difference between the greater of 25 units or 25% of units in the project (the greater of 25 units or 40% of units for projects in low-poverty census tracts) and the number of requested PBV units. More information can be found in the [Support Available to Residents](#) section of this application, pages 25 and 26.

Section 2 - Project Information

13) Newly Constructed and Rehabilitated Project only: As per 24 CFR § 983.153 (f) all newly constructed and rehabilitated buildings with more than four rental units must include installation of broadband infrastructure as this term is defined in 24 CFR § 5.100.

- Yes, the broadband infrastructure will be installed.
- No, the broadband infrastructure will not be installed. Explain why and provide applicable supporting documentation.

Section 3- Need for PBV

1) Need for PBV. Describe the project's need for PBV assistance:

Describe how PBV assistance will contribute to the project's financial health and offers tenant stability. For example, explain added ability to support debt, mitigate rent burden for existing tenants, provide housing to certain affordability tiers, serve targeted populations, and/or any other circumstances that are applicable to the project.

Separately, explain how the project will be impacted if PBV assistance is not awarded. Include description of any financing gaps or indicators of adverse financial health that is indicated in the submitted budget documents. See the following page for more information about budget submission requirements.

Section 3 - Need for PBV

2) Operating Pro Forma Documents

Documents requested in this section must be submitted in Excel format.

Newly Constructed Projects - Attach the following documents:

- a) Full Operating Pro forma that assumes PBV assistance, including development budget, sources and uses, mortgage terms/rates, income, and operating expenses, and 30-year cash flow projection.
- b) The same Operating Pro forma referenced above that reflect income without PBV assistance. This version of the budget should reflect the same affordability tiers and population as the budget in item a, above. If the lack of PBV results in a financing gap or the need for more capital subsidy, this should be reflected in the budget.

Existing and Rehabilitated Projects - Attach the following documents:

- a) Full Operating Pro forma that assumes PBV assistance and any planned rent restructuring and/or increases, including construction budget, sources and uses, mortgage terms/rates, income and operating expenses, and the 30-year cash flow projection including existing/expected debt service.
- b) The same Operating Pro forma referenced above that reflect income without PBV assistance. This version of the budget should reflect the same affordability tiers and population as the budget in item a, above. If the lack of PBV results in a financing gap or the need for more capital subsidy, this should be reflected in the budget.
- c) Full Operating Pro forma that assumes PBV assistance without any planned rent restructuring and/or increases, including construction budget, sources and uses, mortgage terms/rates, income, and operating expenses, and 30-year cash flow projection including existing/expected debt service.
- d) The same Operating Pro forma without any planned rent restructuring referenced in c) above but reflecting income without PBV assistance. This version of the budget should reflect the same affordability tiers and population as the budget in item c, above. If the lack of PBV results in a financing gap or the need for more capital subsidy, this should be reflected in the budget.

Section 3 - Need for PBV

3) Financing Sources and Commitments:

If PBVs are requested in conjunction with an upcoming transaction, complete the following table to reflect anticipated additional funding sources received after award notification. Applicants that are selected for PBV funding are **required** to report any additional funding sources after notification of the PBV award. Documentation of any conditional financing commitment letters may be submitted as part of the application package. The source(s) indicated below should also be reflected in Pro forma documents provided above.

Source	Date of Financing (actual or projected)	Commitment Attached? (Y/N)	Notes
(e.g. Community Preservation Corporation 1st mortgage)	(e.g. TBD –roughly MM/DD/YY)		

4) Provide the status of 9% Low-Income Housing Tax Credits (LIHTC):

9% LIHTC received on:

Or, project applied for 9% LIHTC on:

Decision is anticipated on:

Not applicable or not applying for 9% LIHTC

5) Provide the status of 4% Low-Income Housing Tax Credits (LIHTC):

4% LIHTC received on:

Or, project applied for 4% LIHTC on:

Decision is anticipated on:

Not applicable or not applying for 4% LIHTC

Section 4 - Project Narrative

You may complete the questions in this section using the boxes provided, or submit your response in a separate Word or PDF attachment, which are clearly numbered and correspond to the relevant question.

Provide a project narrative with the following components:

a) Project Description including at least the following elements:

- Address of project, Assessor Parcel Number, and/or Location by census tract
- Total number of buildings in community
- Total number of units by bedroom size in each building
- Number and bedroom sizes of Project Based Vouchers in each building
- Sketches of the proposed unit plans (for new construction)
- Detailed description including amenities and services.

Section 4 - Project Narrative

b) Site and Ownership Description (public or privately owned site; evidence of site control required; if applicant is not current owner, explain if under contract to purchase, acquisition plan/date, etc.; include name of current and/or future legal and beneficial owner[s]).

Section 4 - Project Narrative

c) Population to be served and PBV unit designation (information about prospective residents including Area Median Income (AMI), services to be provided, and any vulnerable populations to be served¹).

¹ Including, but not limited to: homeless households; elderly households, defined as those where head, spouse or cohead is aged 62 or older; households including one adult with a disability who is age 18-61; veterans; Family Unification Program (FUP); youth aged 18-24 who are aging out of, or who have recently aged out of, or who have left foster care; and families in the child welfare system whose housing instability is affecting either their reunification with their child(ren) or may factor into their child(ren)'s placement into foster care; victims of domestic violence and justice-involved individuals.

Section 4 - Project Narrative

d) Any additional information that is relevant for this application.

Section 5 - Deconcentration of Poverty and Expanding Opportunity

1) Neighborhood Information

Census tract, poverty rate, and minority population rate (a, b, and c below) can be found by entering complete address and zip code at the following website: [FFEIC Geocode Map](#) and clicking *Search* for the project.

a) Census Tract of Proposed PBV Project:

Census tract identifier will appear broken down into State Code, County Code, and Tract Code. Enter the four-to-six-digit *Tract code* above.

b) Poverty Rate:

Poverty rate can be found by clicking the *Census Demographic Data* button, and navigating to the *Income* tab. Enter the number indicated in the *% below the Poverty Line* above.

c) Minority Population Rate:

Minority population rate can be found by clicking the *Census Demographic Data* button and navigating to the *Census* tab. Enter the amount in *Tract Minority %* above.

¹OCHA must also consider factors listed in regulations, e.g. [24 CFR 983.55](#).

Section 5 - Deconcentration of Poverty and Expanding Opportunity

2) Deconcentration. Is the proposed project located in a census tract with a poverty rate higher than 20%?

Yes No

If yes, provide a brief description for each of the categories below that explains how your project will address HUD requirements that the location of the proposed PBV project promotes the deconcentration of poverty and expands housing and economic opportunities¹. If necessary, attach additional documentation. If no, type N/A in each box below.

Significant revitalization has occurred or will occur in the census tract where the project is located and/or the surrounding neighborhood(s);

Any local, state, and/or federal dollars that has been invested within the past five years or future commitments of investment in the neighborhood that assists in de-concentrating poverty and expanding opportunities available to residents;

Current or anticipated future development of new market-rate housing in the census tract where the project is located and/or in the surrounding neighborhood(s); and

Access to opportunities for educational and economic advancement in the census tract where the project is located and/or in the surrounding neighborhood.

¹ 24 CFR § 983.55 (b)(1)
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Section 5 - Deconcentration of Poverty and Expanding Opportunity

3) Proximity of social, recreation, commercial, employment and health facilities

a) Check one box per each row below.

b) Attach screenshots or printouts of maps showing examples of each item within a one mile radius of the project.

Distance To:	Less than .5 mile	Approx. 1 mile	More than 1 mile
Shopping, groceries, pharmacy, access to other daily necessities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medical facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public schools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parks, civic facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4) For Newly Constructed projects only: Is the proposed project located in a census tract with a high concentration of minority residents?

Yes No

If yes, provide a brief response to address HUD requirements for site selection standards¹. For example, how the proposed PBV project will help revitalize the neighborhood economically and assist in meeting affordable housing needs. If necessary, submit additional documentation with the application. If no, write N/A in the box below.

¹ 24CFR § 983.55 (e)

Section 6 - Developer and Partner Information

1) Previous OCHA-assisted housing experience

Complete *OCHA's PBV RFP Listing of OCHA-assisted projects* in the last five year spreadsheet to provide information about developer, management and service provider experience with OCHA-assisted housing. Complete a separate tab for each. Note that OCHA may consult internal resources for more information, if applicable.

2) Is the developer, sponsor, owner, service provider or property manager currently involved in litigation or investigation related to their business?

Yes No

If yes, provide an explanation below. Responding yes will not automatically disqualify the application from consideration. If no, write N/A in the box below.

Section 6 - Developer and Partner Information

3) Developer/sponsor/owner experience

Provide a description of experience developing rental housing, including:

a) Number of years of experience in developing rental housing, including the amount of that time devoted to affordable rental housing. If five years of experience or less in developing affordable rental housing, provide additional information describing applicable qualifications;

b) Number of units developed, specifying separately number of affordable and other rental units;

c) Specify experience with past PBV awards and/or other project-based subsidies; and

d) If the sponsor's or owner's portfolio includes any of the below, identify the project and provide an explanation:

- project-based contract that has ever been delayed or underutilized;
- past project HQS failures;
- past project delays reporting vacancies;

Additional Word or PDF pages can be added, if they are clearly labeled.

Section 6 - Developer and Partner Information

4) Property/subsidy management experience

Provide a description of the property and rental subsidy management's experience, which can be direct or through a partnership, including:

- a) Number of years of experience managing and maintaining rental housing, including the amount of time that has been devoted to affordable rental housing. If the applicant has five years of experience or less managing affordable rental housing, provide additional information describing qualifications with administering subsidies;
- b) Proposed / current property management agreement and specify the role that the management will have in subsidy rent-up and administration for the proposed project;
- c) Number and type(s) of units under management; and
- d) Number of years of experience managing assisted rental housing, including Housing Choice Voucher (and PBV) and other programs. Specify whether this was through OCHA or other housing agencies. Specify role in assisting tenants to manage and maintain their subsidy.

Attach any additional materials as needed.

Section 7 - Support Available to Residents

1) Excepted Units. If the project includes excepted units or will serve tenants with Special Purpose Vouchers¹, these tenants must be offered applicable service, which are optional to the tenant.

Describe any services offered to residents at this project accordingly.

a) Indicate whether any services will be offered to tenants without Special Purpose Vouchers.

- Supportive services will be available for all tenants
- Supportive services will only be available for the following groups (specify below):



b) Describe the service for the project, including services that will be offered to tenants that qualify for Special Purpose Vouchers, and services that will be offered to all tenants. The service should be targeted to the population(s) to be served in the project². Include the following information:

- A description of the service provider’s experience working with vulnerable populations, especially with the target population(s) for the project, and with residents of assisted affordable housing; and
- Any funding or contracts for supportive services that the project has been awarded, has applied for, or is planning to apply for. Include the date or anticipated date of award and attach any award letters.

¹ Special Purpose Vouchers

Section 7 - Support Available to Residents

2) All Projects: Additional Support. Use the space below to provide a narrative describing the support that will be available to residents who may struggle with tenancy (e.g. facing a non-payment or holdover eviction, unable to manage their resources, lost income or have experienced any type of abuse). Attach additional materials as needed.

Appendix A - Additional Information for Newly Constructed and Rehabilitated Projects that have Already Started Construction

Appendix A must be completed and submitted as part of the application package for projects that have begun construction or development activities prior to application submission.

Note that even if an AHAP is not needed at this time, the project must remain in full compliance with all HUD requirements. By checking the below boxes and signing below, the owner certifies that the following documents will be provided to OCHA after selection and before the HAP contract execution. This certification is required.

Subsidy Layering Review¹

It is the sole responsibility of the proposer to ensure that they are in compliance with any subsidy layering requirements imposed upon the project from previous funding sources.

Environmental Review (if applicable)²

Pre-Construction Architect Statement affirming compliance with the Fair Housing Act, the Americans with Disability Act Accessibility Guidelines³, and Section 504 of the Rehabilitation Act of 1973. (if applicable)

Signature of Owner

Title

Date

¹ HUD requires a subsidy layering review (SLR) be conducted when new construction or rehabilitation housing will include PBVs in combination with other governmental housing assistance from federal, state, or local agencies, including assistance such as tax concessions or tax credits.

² Certain PBV activities are subject to HUD environmental regulations in 24 CFR parts 50 and 58. Applicant will be required to procure an environmental consultant to prepare the environmental review which must be provided to HAOC within X days from the award of the PBVs.

³ [Accessibility Requirements for Buildings | HUD.gov / U.S. Department of Housing and Urban Development \(HUD\)](#)

Appendix B - Additional Information for Existing and Rehabilitated Projects

Appendix B must be completed and submitted as part of the application package for Rehabilitated and Existing Housing projects.

1) Attach a rent roll, (provided in application materials) identifying units proposed for PBV assistance.

All units indicated for PBV must be ready for HQS inspection, have eligible tenants (if the building is occupied) who are interested in and eligible for PBV assistance, and represent the full intended group of assisted units. Applicants can swap or reduce the number of units after application submission, with PHA approval on a case-by-case basis.

Complete all columns on the rent roll with the unit's characteristics, occupants, any other assistance, and legal rents as indicated on each column's header. This information will assist OCHA to determine project and occupant eligibility.

2) If known, include how many current tenants in the project have income below 50% Average Median Income (AMI)? If unknown, write N/A in both.

Describe below the methodology used to determine the number of projected tenants that will have incomes below 50% AMI (e.g., if estimated, how was the estimate calculated? If verification of tenant incomes has been conducted include the dates of the most recent verification).

Appendix B - Additional Information for Existing and Rehabilitated Projects

3) What, if any, information has been communicated to residents about the intention to apply for PBV units?

In order to qualify for PBV, existing residents must meet certain requirements, such as providing income information and access to the unit for Housing Quality Standards inspections, and being in an appropriately sized unit (see [PBV Resident Eligibility](#) on page 4). Include plans to communicate and work with applicants to facilitate inspections and applications if selected.

4) Does the property have any Minimum Housing Code violations?

Yes No

If yes and there are any open violations at the property, describe below and submit materials listing all violations (such as a violation summary report) and evidence of a clearance plan, corrective action plans, summaries of corrective actions taken and/or dismissal inspection requests. If no, enter N/A.

Appendix B - Additional Information for Existing and Rehabilitated Projects

- 5) Indicate the projected Maintenance and Operations Expense Budget for the project.
 - a) Complete the chart on the next page.

Number of Residential Units (incl. Super) in project:

Number of Non-Residential Units in Project:

	PROJECTED CALENDAR YEAR	CURRENT YEAR	PAST YEAR
ADMINISTRATIVE EXPENSES	PROJECTED EXPENSES		
Property Management Fees			
Professional Fees - Auditing			
Professional Fees - Legal			
Other:			
TOTAL ADMINISTRATIVE EXPENSES	\$		
UTILITY EXPENSES			
Electricity			
Water and Sewer			
Heating			
TOTAL UTILITY EXPENSES	\$		
OPERATING AND MAINTENANCE EXPENSES			
Salaries (incl. salaries, employee benefits, and payroll taxes)			
Supplies/ Cleaning/ Exterminating			
Repairs and Maintenance (incl painting, etc.)/ Contracts			
Elevator			
Other:			
TOTAL OPERATING AND MAINTENANCE EXPENSES	\$		
TAXES AND INSURANCE EXPENSES			
Property and Liability Insurance			
Real Estate Taxes			
Other:			
TOTAL TAXES AND INSURANCE EXPENSES	\$		
TOTAL EXPENSES	\$		
Per Unit			
Per Room			

Appendix C - Additional Information for Projects not Affiliated with OCHA

1) *Newly Constructed Projects*: Provide the following information and attach any additional relevant documents to give OCHA more information about the project.

a) Describe the project status, including the name of the General Contractor, the status of permits, the status of environmental review/ appeals, and any predevelopment work completed or is pending.

b) Anticipated Construction Schedule:

Anticipated Finance Closing Date:

Anticipated Construction Start Date:

Anticipated Construction Completion Date:

Anticipated Occupancy Date:

Appendix C - Additional Information for Projects not Affiliated with OCHA

2) *Rehabilitated Projects*: Provide the following information and attach any relevant documents to give OCHA more information about the project.

a) Describe the project status, including the name of the General Contractor, and the status of permits.

b) Construction Schedule:

Anticipated Finance Closing Date:

Anticipated Construction Start Date:

Anticipated Construction Completion Date:

Anticipated Occupancy Date:

c) Attach Integrated Physical Needs Assessment (IPNA) or other property condition report.

Appendix C - Additional Information for Projects not Affiliated with OCHA

3) *Existing Projects:* Provide the following information and attach any relevant documents to give OCHA more information about your project:

a) Describe the project status, including plans for rent restructuring, finance closing, conversion to permanent financing, marketing/lease-up status and compliance with the Fair Housing Act, the Americans with Disabilities Act Accessibility Guidelines, and Section 504 of the Rehabilitation Act of 1973.

b) Project Readiness (enter N/A for any date that does not apply):

Construction Completion Date:

Occupancy Date:

Anticipated Finance Closing Date:

Rent Restructuring is Anticipated to be Completed By:

Ready to Execute the HAP Contract by (Date):

Certification Statements - For All Projects

I _____ understand that the site must prevent discrimination against persons seeking to rent, lease, secure financing for or purchase of PBV units on the basis of race, color, national origin, religion, sex, disability and the presence of children. I understand and agree to abide by all applicable federal Section 8 requirements found at 24 CFR Part 983 and OCHA’s PBV requirements found in its Housing Choice Voucher (HCV) Administrative Plan. I understand that these include, but are not limited to, complying with the following if the project is selected:

- a) Applicable provisions of the Title IV of the Civil Rights Act of 1964¹ and Title VIII of the Civil Rights Act of 1968² as well as HUD's implementing regulations³
- b) Submitting an Architect's Certificate affirming compliance with the Fair Housing Act, the Americans with Disabilities Act Accessibility Guidelines, and Section 504 of the Rehabilitation Act of 1973;
- c) Participating in a National Environmental Policy Act (NEPA) environmental review for the project (Newly Constructed and Rehabilitated projects);
- d) Participating in a Subsidy Layering Review for the project (Newly Constructed and Rehabilitated projects only) and disclosing any information that may result in excess public assistance to the project; and
- e) Providing the project’s Tenant Selection Plan reflecting the target population indicated in this proposal and consistent with federal rules and regulations and OCHA regulatory agreement and marketing plans;
- f) Complying with Davis-Bacon Rules⁴, as interpreted by OCHA, if my project is awarded nine or more PBV-assisted units, and providing evidence to OCHA upon request.

I attest and certify that all of the information herein contained is true and accurate to the best of my knowledge. I understand that by submitting this application for project-based assistance there is no commitment from Orange County Housing Authority that my proposal will be selected.

I attest and certify that there is no owner or project principal⁵ on the U.S. General Services Administration list of parties excluded from Federal procurement and non-procurement programs. And I certify that I will disclose any possible conflict of interest that would violate the AHAP, HAP, or HUD regulations, in accordance with 24 CFR § 982.161. Provide a narrative, if applicable.

Owner Name

Owner Title

Owner Signature

Date

¹ Civil Rights Act of 1964

² Title VIII of the Civil Rights Act of 1968

³ 24 CFR part 1; 24 CFR parts 100-199; 24 CFR part 107

⁴ For more information about Davis Bacon prevailing wage rules requirements use the link <https://www.dol.gov/agencies/whd/government-contracts/construction>

⁵ This includes the officers and principal members, shareholders, investors, and other parties having a substantial interest in the project.

Certification Statements for Existing Projects Only

I, [Redacted], the owner of [Redacted] [Project Name] the Existing project applying for Project-Based Vouchers, certify that there are no plans to undertake substantial¹ improvement for the project from the proposal submission date through the first two years of the Housing Assistance Payments contract.

Owner Name

[Redacted]

Owner Title

[Redacted]

Owner Signature

[Redacted]

Date

[Redacted]

¹ As defined in 24 CFR § 983.3, "substantial improvement" is a remodeling that alters the nature or type of housing units in a project, reconstruction, or a substantial improvement of the quality or kind of equipment and materials. The replacement of equipment and/or materials rendered unsatisfactory because of normal wear and tear by items of substantially the same kind does not constitute a substantial improvement.

Application Submission Checklist

Type	Required Documents
<u>Newly Constructed and Rehabilitated Projects with Active Construction: Appendix A</u>	<input type="checkbox"/> Sign Certification confirming the documents' submission (<i>Question 2</i>)
<u>Existing and Rehabilitated Projects: Appendix B</u>	<input type="checkbox"/> Attach rent roll (<i>Question 1</i>) <input type="checkbox"/> Provide a narrative explaining how PBVs will be communicated to the tenants (<i>Question 3</i>) <input type="checkbox"/> Provide information on code violations (if applicable) (<i>Question 4</i>) <input type="checkbox"/> Fill out expense chart and provide explanation if needed (<i>Question 5</i>)
<u>Projects not affiliated with OCHA: Appendix C</u>	<input type="checkbox"/> Fill out project's commitment to enter the OCHA regulatory agreement (<i>Question 1</i>) <input type="checkbox"/> Fill out information on tax benefits (<i>Question 2</i>) <input type="checkbox"/> Provide the project information based on the project type (<i>Question 3, 4 or 5 depending on project type</i>)
<u>Certification Statement</u>	<input type="checkbox"/> Complete and sign Certification Statements