

## APPENDIX M

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### ADDITIONAL DOCUMENTATION REQUIRED PRIOR TO RESERVATION OF FUNDS

The following information is **not** required for the application to the NOFA, but will be required before PHB issues a Reservation of Funds.

#### **Project Design:**

- Conceptual architectural plans and site plans
- Narrative of Building Materials and Systems
  - Describe the materials proposed and the appropriateness for the target population
- Project schedule (critical path)

#### **Project Financing:**

- Updated development budget
- Updated operating proformas, including rent schedules
- Updated preliminary sources and uses

#### **Property Information:**

- Preliminary title report
- Site control evidence

#### **If the project involves an occupied building:**

- An updated Preliminary Relocation Plan
- Lead paint documentation if structure was constructed prior to 1978
- History of capital improvements and major repairs for last 2 years

#### **Project Sponsor:**

- Corporation/partnership articles and by-laws
- Federal income tax return (2 years)
- Updated financial statements (2 years) PHB may request audited financial statements for larger projects (e.g. over 12 units)
- Certification of Participant Regarding Debarment, Suspension and Other Responsibility Matter
- Lobbying certificate
- Proof of City of Portland business license

#### **Services, Management and Asset Management:**

- Letter of intent from service provider

#### **Business and Workforce Equity:**

- Updated M/W/ESB and Section 3 Business Utilization Plan which might include:
  - A description of the process to be used for selecting the general contractor;

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- A description of how PHB staff will be integrated in all aspects of contracting as they relate to M/W/ESB issues;
- A description of how the development team intends to meet the requirements of the City's procurement office including the Good Faith Effort program