

HUD Form #9002-ORCF, Lender Narrative- Section 232/223(f) Refinance

LOCATION	CURRENT TEXT	REVISED TEXT
p. 1	<p>Public reporting burden for this collection of information is estimated to average 70 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless that collection displays a valid OMB control number.</p>	<p>Public reporting burden for this collection of information is estimated to average 70 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The information is being collected to obtain the supportive documentation that must be submitted to HUD for approval, and is necessary to ensure that viable projects are developed and maintained. The Department will use this information to determine if properties meet HUD requirements with respect to development, operation and/or asset management, as well as ensuring the continued marketability of the properties. Response to this request for information is required in order to receive the benefits to be derived from the National Housing Act Section 232 Healthcare Facility Insurance Program. This agency may not collect this information, and you are not required to complete this form unless it displays a currently valid OMB control number. While no assurance of confidentiality is pledged to respondents, HUD generally discloses this data only in response to a Freedom of Information Act request.</p>

p.1	Warning: Any person who knowingly presents a false, fictitious, or fraudulent statement or claim in a matter within the jurisdiction of the U.S. Department of Housing and Urban Development is subject to criminal penalties, civil liability, and administrative sanctions.	Warning: Anyone who knowingly submits a false claim or makes a false statement is subject to criminal and/or civil penalties, including confinement for up to 5 years, fines, and civil and administrative penalties. (18 U.S.C. §§ 287, 1001, 1010, 1012; 31 U.S.C. §3729, 3802).
p.1	Privacy Act Notice: The Department of Housing and Urban Development, Federal Housing Administration, is authorized to collect the information requested in this form by virtue of: The National Housing Act, 12 USC 1701 et seq. and the regulations at 24 CFR 5.212 and 24 CFR 200.6; and the Housing and Community Development Act of 1987, 42 USC 3543(a). The information requested is mandatory to receive the mortgage insurance benefits to be derived from the National Housing Act Section 232 Healthcare Facility Insurance Program. No confidentiality is assured.	Privacy Act Statement: The Department of Housing and Urban Development, Federal Housing Administration, is authorized to collect the information requested in this form by virtue of: The National Housing Act, 12 USC 1701 et seq. and the regulations at 24 CFR 5.212 and 24 CFR 200.6; and the Housing and Community Development Act of 1987, 42 USC 3543(a). The information requested is used to review applications within HUD. No information will be disclosed outside of HUD. The information requested is mandatory to receive the mortgage insurance benefits to be derived from the National Housing Act Section 232 Healthcare Facility Insurance Program. No applications will be reviewed or approved without the necessary information requested. No confidentiality is assured.
p. 7	New line	Green MIP Retrofits:
p. 8	New line	Green MIP Reports Conclusion is: Accepted as is. Cannot be modified by lender.
p. 12-13	New language	11. For Green MIP projects, did the project Architect or the energy design professional determine that the project will not achieve the selected green building certification, energy and water reductions, and Energy Star Score required for the reduction of the Green MIP rate? N/A 12. For Green MIP projects, are the energy conservation measures limited to the area of repairs,

		<p>alterations, addition and/or a new construction rather than covering the entire project? N/A</p> <p>13. For Green MIP projects, does the energy design professional lack the relevant experience and qualifications as provided in ORCFs Green MIP Program Guidance? N/A</p>
p. 13	<<If you answered “yes” to any of the questions above, this facility is not eligible under this program. >>	<<If you answered “yes” to any of the questions above, this facility is not eligible under this program. Note: HUD will not consider changes to participate in the Green MIP program after the issuance of a Firm Commitment. >>
p. 19	New language	<p>Project Architect or Professional Engineer (PE) for the Green MIP Program (if applicable) <<Brief description of qualifications demonstrating that the energy design professional meets HUD requirements. See Program guidance for details on qualifications>></p> <ul style="list-style-type: none"> The energy design professional (Architect or PE) may not serve as both the energy design professional representing the Borrower and also the green building certification verifier/validator representing the standard-keeper of the green building certification.
p. 16	6. Is the project in a state with an Olmstead Plan, pending Olmstead cases, Olmstead settlement agreements, or is the project’s state active in initiatives to “right-size” nursing facilities or otherwise working to “rebalance” long-term supports and services toward home and community-based settings?	6. Is the project in a state with an Olmstead Plan, pending Olmstead-related cases, an Olmstead-related settlement agreement or orders, or is the project’s state active in initiatives to “right-size” nursing facilities or otherwise working to “rebalance” long-term supports and services toward home and community-based settings?
	<<Narrative description about the	<<Narrative description about the

p. 19	<i>parking including the number of spaces, compliance with accessibility, adequacy of the parking, and any parking easements. Also, discuss any zoning or marketability issues. >></i>	<i>parking including the number of spaces, compliance with accessibility requirements, adequacy of the parking, and any parking easements. Also, discuss any zoning or marketability issues. >></i>
p. 20	<<Brief narrative description to include number of buildings; construction types; building size; describe common areas; amenities, etc. >>	<<Brief narrative description to include number of buildings; construction types; building size; describe common areas; amenities, etc. For Green MIP projects, describe the scope of work relied upon in selecting the green building standard (e.g., minor or major retrofits/renovations, adding an addition or new construction outside the footprint of the existing building; etc.) >>
p. 47	New language	Name of energy design professional (if applicable):
p. 47	The report was prepared in accordance with the Project Capital Needs Assessment Statement of Work.	The report was prepared in accordance with the Project Capital Needs Assessment Statement of Work, and, if applicable, in accordance with the Green MIP Program Guidance.
p. 47	Critical Repairs: Non-Critical Repairs: Borrower Proposed Repairs:	Critical Repairs: Non-Critical Repairs: Energy Conservation Retrofits (Green MIP): Borrower Proposed Repairs:
p. 48	1. Will non-critical, or borrower proposed repair escrow be less than 120% of the repair estimate?	1. Will non-critical, energy conservation retrofits, or borrower proposed repair escrow be less than 120% of the repair estimate?
p. 48	Handicapped Accessibility	Accessibility for Persons With a Disability
p. 48-49	<<Provide a brief summary of modifications made by underwriter. If none, state none. Example: “The PCNA’s analysis of reserve requirements for major movable equipment included replacement of the facility’s bus/van. The underwriter has deleted this item as it is not eligible for reimbursement from the replacement reserve account.”.>>	<<Provide a brief summary of modifications made by underwriter. If none, state none. Example: “The PCNA’s analysis of reserve requirements for major movable equipment included replacement of the facility’s bus/van. The underwriter has deleted this item as it is not eligible for reimbursement from the replacement reserve account.” Note:

		the lender or borrower cannot make any modifications to the energy conservation retrofits associated with the Green MIP reduction program.>>
p. 49	New section	<p>Green MIP Summary <<Provide narrative discussion. Include the name of the Standard Keeper and also the name of the green building certification and level that will be provided (e.g., LEED, Silver, Gold, etc.). Include the current Energy Star Score and provide the current baseline Energy Use Intensity (kBtu/ft2) as analyzed in the Statement of Energy Performance (SEP), or, if an addition is contemplated, provide the design (proposed) Energy Use Intensity (kBtu/ft2) results and prospective Energy Score Rating as analyzed in the Statement of Energy Design Intent (SEDI) Report. Confirm that the proposed energy and water reductions, the green building certification and the required Energy Star Score will be achieved per ORCFs Green MIP Program Guidance. Energy conservation measures must be designed for the entire project. >></p> <p>If the existing mortgage is FHA insured with a green-MIP rate, and its green building certification is more than 15 years old, then the project must certify to the next level of retrofits/repairs.</p>
p. 50	New section	<p>Non-Critical Repairs for Green MIP Projects: <<Provide a brief summary of the required non-critical repairs for energy conservation retrofits. Example: The energy design professional identified the following non-critical repair/retrofit items totaling \$: 1. Remove and replace .</p>

		Estimated cost: \$. 2. Install in all units. Estimated Cost: \$.
p. 56; p. 61; p.67; p. 80; p. 83	form	Form