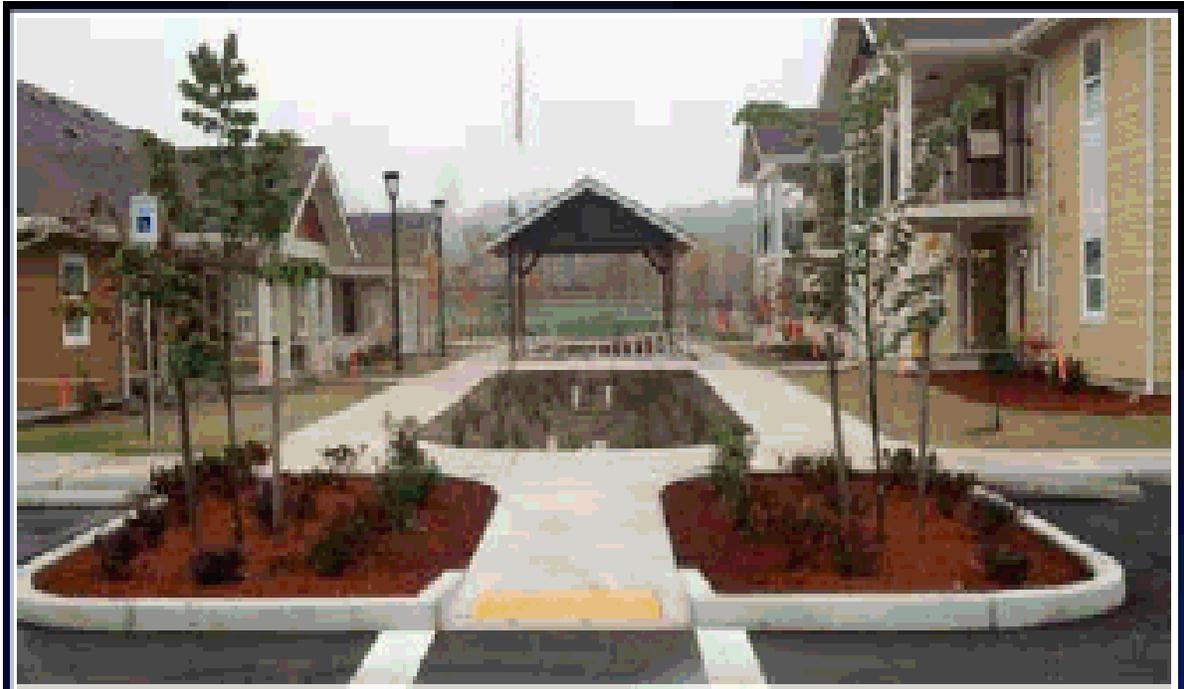


**OREGON STATE HOUSING COUNCIL
PUBLIC MEETING**

Date: November 15, 2013

Time: 9:00a.m.



*Eagle's Landing Apartments
990 Veteran's Way, Roseburg OR*

MEETING LOCATION:

Oregon State Library, 1st Floor Conference Room 103/104
250 Winter St NE, Salem, OR 97301

CALL IN PHONE NUMBER:

Call in Number: 1-877-273-4202
Room Number: 4978330

OREGON STATE HOUSING COUNCIL

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Oregon State Housing Council

725 Summer St NE, Suite B
Salem, OR 97301-1266
Phone: 503.986.2000
Fax: 503.986.2132
TTY: 503.986.2100
www.ohcs.oregon.gov/OHCS/OSHC



Council Members:
Jeana Woolley, Chair
Mayra Arreola
Tammy Baney
Aubre L. Dickson
Michael C. Fieldman
Zee D. Koza
Adolph "Val" Valfre, Jr.

OREGON STATE HOUSING COUNCIL MEETING November 15, 2013 Meeting Agenda

MEETING TIME: 9:00 A.M

MEETING LOCATION:

Oregon State Library
250 Winter Street NE | Conference Room 103/104
Salem OR 97301

Call in Number: 1-877-273-4202; Room Number: 4978330

- | | | |
|----|--|-----------------------------------|
| 1. | CALL TO ORDER | Jeana Woolley, Chair |
| 2. | ROLL CALL | Jeana Woolley, Chair |
| 3. | Approval of Housing Council Meeting Minutes | Jeana Woolley, Chair |
| | a. October 4, 2013 | |
| 4. | Public Comment | Jeana Woolley, Chair |
| 5. | Residential Loan Program – Consent Calendar Approval | Kim Freeman, OHCS |
| | a. 6600 Jacobe Street NE Salem, OR 97303 | |
| | b. 800 Huron Court SE Salem, OR 97302 | |
| 6. | New Business | |
| | a. Notice of Funding Availability | Margaret Van Vliet, OHCS Director |
| | 1. Overview | |
| | 2. Staff Presentation | Julie Cody, OHCS |
| | A. Projects Awarded by OHCS | |
| | B. Projects Recommended for Approval | |
| | 1. Heritage Heights | |
| | 2. Sunset Senior Housing II | |
| | b. Public Comment | Jeana Woolley, Chair |
| 7. | Report of the Director | Margaret Van Vliet, OHCS Director |
| | a. Transition Plan Project Discussion | |
| | b. Scenario Review | |
| | c. Next Steps | |

- | | | |
|-----|---|----------------------|
| 8. | Report of the Chair | Jeana Woolley, Chair |
| a. | Rescheduling January 10 th Meeting | |
| 9. | Other | Jeana Woolley, Chair |
| 10. | Adjourn State Housing Council Meeting | Jeana Woolley, Chair |



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Adolph "Val" Valfre, Jr.

OREGON STATE HOUSING COUNCIL MEETING October 04, 2013 Meeting Minutes

MEETING LOCATION: Conference Room 124a/b ; North Mall Office Building;
725 Summer Street NE | Salem, OR 97301

Call in Number: 1-877-273-4202; **Room Number:** 4978330

Housing Council Members Present:

Jeana Woolley, Chair
Aubre Dickson
Mike Fieldman
Val Valfre
Mayra Arreola
Tammy Baney
Zee Koza

OHCS Staff Present:

Margaret Van Vliet, Director Oregon Housing and Community Services
Julie Cody, Program Delivery Division Administrator
Diana Koppes, Business Operations Division Administrator
Katherine Silva, Executive Assistant to the Director
Heather Pate, Program Manager Multifamily Finance and Resources Section
Rem Nivens, Government Relations and Policy Advisor
Mike Boyer, Legislative and communications Coordinator
Karen Clearwater, Regional Advisor to the Department
Vince Chiotti, Regional Advisor to the Department
Kim Travis, Community Engagement Manager

Guests Present:

Tom Cusack, Oregon Housing Blog
Shelly Cullin, Chrisman Development
Michelle Diester, Oregon Legislative Fiscal Office

1. CALL TO ORDER

Chair Woolley calls the October 4, 2013 meeting to order at 9:02 a.m.

October 4th Oregon State Housing Council Meeting Minutes

2. ROLL CALL

Chair Woolley asks for roll call. Present: Mayra Arreola, Tammy Baney, Aubre Dickson, Mike Fieldman, Zee Koza, Adolph Val Valfre, Jr. and Chair Jeana Woolley.

3. Approval of Housing Council Meeting Minutes

a. September 6, 2013

Chair Woolley noted for council members that Val Valfre worked with staff on minor changes to the minutes to correct non-substantive errors and thanked him for this effort; she then asked for any additional corrections to the September 6th, 2013 meeting minutes. There being no further corrections the motion was read:

Motion: Val Valfre moves that the Housing Council approve the, 2013 meeting minutes as written. Zee Koza seconded.

Vote: In a roll call vote the motion passes. Members present: Mayra Arreola, Tammy Baney, Aubre Dickson, Mike Fieldman, Adolph Val Valfre Jr., and Chair Jeana Woolley.

4. Public Comment

Chair Woolley called for anyone in the audience or joining by phone who wished to provide public comment for the council's consideration to come forward. With no one identifying themselves, the council proceeded to the next agenda item.

5. 2013 NOFA Discussion

Diana Koppes, Business Operations Division Administrator provided council members with a overarching description of the NOFA process stating that application have been received by the Department. Once received each application goes through a threshold review for financial feasibility followed by a threshold review for sponsor capacity. Applications that meet both thresholds are forwarded to the scoring committee who will score each project individually. The scores are then forwarded to the smaller scoring committee for consideration and recommendations to the Director.

Council members reviewed and provided feedback to staff regarding the project summary template which will be used in the NOFA Presentation at the November 15th housing council meeting.

Mayra Arreola asked about the role of the Regional Advisors in the NOFA process?

Chair Woolley echoed this question, adding that she received feedback that there was not as much direct Department step-by-step assistance this time despite the traditional role of the RADs to provide technical assistance with the application.

Julie Cody stated that RADs providing technical assistance was still a function of the advisors; however, within this process the RADs reported questions back to the Department to be answered collectively and reported back out to all applicants in published FAQs. FAQs were published 3 times

October 4th Oregon State Housing Council Meeting Minutes

during the process to ensure that the Department was providing consistent information and keeping the level playing field. Department staff also benefited from being able to note in one place where areas of confusion came up in order to improve the process going forward.

Diana Koppes reminded council members that the Department is operating the existing NOFAs under the temporary rules adopted back in June. The current temporary rules are set to expire on December 18th and cannot be extended for an additional 180 days. The Department will be looking to establish permanent rules in January of 2014 so that HOME and LIHTC NOFAs can be issued next mid or late spring. A post-NOFA workshop will be held to work through specific issues that surfaced during the process and staff will communicate with partners regarding the projected timeline for public input which will also be shared with housing council members.

Julie Cody, Program Delivery Division Administrator, added that for the amount of change represented in this process, OHCS partners did really well and the Department is looking forward to further dialogue about how the process can be further improved. Cody reported that comments and suggestions for process improvement are currently being received and have been worked on concurrent to this NOFA in an effort by staff to be proactive and keep the timeline moving toward the next NOFA.

Director Margaret Van Vliet acknowledged and applauded staff for their work, as this the most rigorous process OHCS has undertaken in comparison to the past Consolidated Funding Cycle. Van Vliet stated that staff have learned a lot and will continue to listen and refine moving forward. Aubre Dickson commented that his original impression of the NOFA process was that the scoring would be overly daunting, but found that the scoring sheets a formatted well and were very helpful. He further commented that the construct of the scoring may need to be adjusted to eliminate repetitiveness and incorporate missing information referenced by applicants, but overall he congratulated staff on this effort.

Val Valfre added that the feedback he has received has been very positive, particularly with regard to the accessibility of staff and amount of information provided.

Chair Woolley congratulated the whole Department on the huge undertaking in light of all other ongoing changes. She also encouraged staff to recognize that although the process may be imperfect, it is a best effort and work in progress that everyone should feel good about.

6. **OHCS Transition Planning**

OHCS Director Margaret Van Vliet provided council members with an overview of the transition plan project timeline reminding them the scenario build process will wrap up at the end of October. Van Vliet presented a full overview of the scenario build process and what work product is expected from that process. This presentation can be found on the Housing Council website.

7. **Report of the Director**

October 4th Oregon State Housing Council Meeting Minutes

Director Van Vliet had nothing further to report.

8. **Report of the Chair**

Chair Woolley deferred her report until the November meeting.

9. **Other**

Chair Woolley requested that council members prepare the November meeting to be a long but fruitful meeting and that all members make every effort to attend.

10. **Adjourn State Housing Council Meeting**



Oregon

John A. Kitzhaber, MD, Governor

Date: 11/5/2013

To: State Housing Council

From: Kimberley Freeman, Manager
Homeownership Section

Re: Residential Loan Program - purchase of loans equal to or greater than 75% of the local area Acquisition Cost Limit, or \$190,000, whichever is greater.

Background: State statutes require the State Housing Council to establish a single family loan threshold for loans to be reviewed and approved prior to purchase. The current threshold for single family loans includes all loans equal to or greater than 75% of the applicable area program purchase price limit, or \$190,000, whichever is greater.

Considerations: Staff has reviewed all of the following loan files and concluded that the borrowers and properties meet all relevant program guidelines for the Residential Loan Program. All required documents have been properly executed, received, and the loans have been approved for purchase. In addition to being approved by staff, the loan files have been underwritten by the applicable lenders and are insured by either FHA (FB), Rural Development (RG), or Uninsured (U) with a loan-to-value of 80% or less.

1	<u>Borrower</u>		<u>Lender</u>	HOMESTREET BANK	
	<u>Co-Borrower</u>				
			<u>Purchase Price</u>	\$ 210,000	<u>Note Amount</u> \$ 206,196
			<u>Cost Limit</u>	\$ 268,860	<u>Principal Balance</u> \$ 206,196
<u>Property Address</u>	800 BLOCK HURON COURT SE		<u>Appr. Value</u>	\$ 219,000	
	SALEM	OR 97302	<u>Year Built</u>	1963	
			<u>Living Area (Sq. Ft.)</u>	2,451	<u>Loan-to-Value</u> 97%
			<u>Lot Size (Sq. Ft.)</u>	11,800	<u>Insurance Type</u> FB
<u>Hshld. Income</u>	\$ 77,488		<u>Cost per Sq. Ft.</u>	\$ 85.68	<u>Rate</u> 3.125%
<u>Income Limit</u>	\$ 82,880				
<u>% of Income Limit</u>	93.49%				
<u>Prior Ownership Yes (Y) or No (N)</u>	N		<u>New (N) or Existing (E)</u>	E	
			<u>Construction Style</u>	Two Story	

2	<u>Borrower</u>		<u>Lender</u>	HOMESTREET BANK	
	<u>Co-Borrower</u>				
			<u>Purchase Price</u>	\$ 214,900	<u>Note Amount</u> \$ 211,007
<u>Property Address</u>	6600 BLOCK JACOBE ST NE		<u>Cost Limit</u>	\$ 268,860	<u>Principal Balance</u> \$ 211,007
	SALEM	OR 97303	<u>Appr. Value</u>	\$ 215,000	
			<u>Year Built</u>	2013	
<u>Hshld. Income</u>	\$ 69,899		<u>Living Area (Sq. Ft.)</u>	1,966	<u>Loan-to-Value</u> 97%
<u>Income Limit</u>	\$ 71,040		<u>Lot Size (Sq. Ft.)</u>	4,800	<u>Insurance Type</u> FB
<u>% of Income Limit</u>	98.39%		<u>Cost per Sq. Ft.</u>	\$ 109.31	<u>Rate</u> 3.125%
<u>Prior Ownership Yes (Y) or No (N)</u>	N		<u>New (N) or Existing (E)</u>	N	
			<u>Construction Style</u>	Two Story	

Recommended Motion: That the Oregon State Housing Council approve the Consent Calendar.



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

PROJECT SUMMARY									
Region:	Valley	Project Number:	3075						
Project Name:	Bascom Village	County:	Lane						
Project Address:	Park View Drive and County Farm Road Street Eugene, Oregon 97408	Total # of Units:	53						
Sponsor Name:	St. Vincent de Paul of Lane County, Inc.	Construction Type:	New Construction						
Target Population:	Family & Homeless Veterans	# of Years Affordable:	60						
Basis Boost Requested: Y/N	N	Census Tract Poverty Rate:	12.4%						
Total # of Units by Type and AMI:									
Studio:		1-Br:	13	2-Br:	24	3-Br:	15	4-Br.	1
AMI:		AMI:	50% (13)	AMI:	50% (24) + 1 Mgrs.	AMI:	50% (15)	AMI:	50% (1)

SOURCES & USES									
OHCS LIHTC Allocation:					\$810,000				
OHCS OAHTC Allocation:					\$800,000				
SOURCES					USES				
OHCS GHAP:				\$	Land Costs:	\$464,393			
OHCS HELP:				\$	Hard Costs:	\$6,959,385			
OHCS WX:				\$	Soft Costs:	\$2,903,636			
Local Government Resources:	City of Eugene HOME		\$410,274	TOTAL USES:		\$10,327,414			
	City SDC Waivers		\$249,593	DCR:	1.0				
	City of Eugene Land		\$462,393						
Mortgage Loan(s):				\$800,000					
Tax Credit Equity				\$7,937,206					
Other funds:				\$467,948					
TOTAL SOURCES:				\$10,327,414					
Other Non-cash Contributions:				\$					



Multi-Family Development Project Summary
OHCS 2013 Notice of Funds Availability (NOFA)

NARRATIVE(S)	
Project Description:	<p>Bascom Village Apartments is a new construction project consisting of 15 residential buildings containing a total of 53 residential units including a 2 bedroom manager's unit. One building will contain community space on the ground floor and residential flats on the upper floor. The project will be constructed on a 2.62 acre parcel. All utilities are currently present at the site.</p> <p>The proposed buildings will be wood frame consisting of 2 and 3 stories. Individual units will include washer/dryer hookups, patios or balconies, built-in desk areas, split bathrooms designed for multiple users, and energy efficient appliances. The project will have a playground, laundry room, secure outdoor storage space and a 24 hour onsite manager. There will be 70 parking spaces (1.32 spaces per unit).</p> <p>Elementary, Middle and High Schools are all nearby and the neighborhood is in close proximity to a number of employment centers, retail shopping centers, restaurants, grocery stores, commercial services and medical services.</p>
Sponsor/Developer Profile & History:	<p>St. Vincent de Paul Society of Lane County (SVDP) has a 25 year history developing affordable housing including over 1,000 units and 22 tax credit projects. Recent projects SVDP recently completed the Stellar Apartments project, a 54 unit multi-family development in Eugene.</p> <p>The project design team includes Bergsund DeLaney Architecture and Planning and Meili Construction. Both firms have a long-standing working relationship with SVDP as well as vast experience in affordable housing development. This team regularly completes projects within budget and time constraints while maintaining quality design and construction standards.</p>
Community Need:	<p>Bascom Village is a family and homeless veteran housing project located in Lane County in the city of Eugene. Lane County is an under-served county representing 36% of the region's need for affordable housing but having just 32% of the region's affordable housing stock. While the city of Eugene is home to just 19% of the region's renter households, it represents 24% of the extreme rent burdened households; 75% of low-income renters, nearly 16,000, in the city of Eugene are housing burdened.</p>
Resident Services and Committed Partnerships for Successful Residency:	<p>The population of Bascom Village Apartments is expected to be individuals, families and homeless veterans at or below 50% AMI. SVDP has extensive experience serving these populations.</p> <p>SVDP will replicate the successful housing model for homeless veteran families now in place at Stellar Apartments. In partnership with Lane County Housing and Community Service Agency (HACSA), five units will be reserved households of a veteran who has served in our current conflicts. HACSA will provide Housing Choice Vouchers and SVDP will provide case management and services to assist these families to reintegrate into civilian life.</p>



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

	<p>SVDP will also provide an extensive selection of resident services that include: workforce readiness and job-skill building services, asset-building programs, services to help families achieve financial and life goals, services to build residential community, services for youth and children and support services for the five veteran households. In addition, SVDP will hold meetings with tenants to incorporate any new services or activities Bascom residents may identify.</p>
<p>Community Impact:</p>	<p>Bascom Village is located in the fastest growing area for residential and commercial development in Eugene. Within two years, 610 new jobs will be in proximity to this site. The project helps deconcentrate poverty, increase equity, and reduce commuting, thereby stabilizing the workforce and reducing household burden. The City of Eugene has made significant investments including waiving System Development Charges, a property tax exemption, construction of a road and \$410,274 in HOME funds. St. Vincent de Paul and Housing and the local Housing Authority are joining in a unique partnership with Lane Workforce Partnership to develop this project and increase prosperity for residents.</p>
<p>Conditions:</p>	<p>Meets all programmatic, reservation letter, and OHCS requirements.</p>



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

PROJECT SUMMARY									
Region:	East			Project Number:	3128				
Project Name:	Blue Springs Crossing			County:	Union				
Project Address:	10800 Walton Road, Island City, OR 97850			Total # of Units:	38				
Sponsor Name:	Northeast Oregon Housing Authority			Construction Type:	New Construction				
Target Population:	Family			# of Years Affordable:	60				
Basis Boost Requested: Y/N	Yes			Census Tract Poverty Rate:	12.8%				
Total # of Units by Type and AMI:									
Studio:		1-Br:	16	2-Br:	12	3-Br:	10	4-Br.	
AMI:		AMI:	50% (2) 60% (14)	AMI:	60% (12)	AMI:	60% (10)	AMI:	

SOURCES & USES									
OHCS LIHTC Allocation:					\$ 689,811				
OHCS OAHTC Allocation:					\$ 915,000				
SOURCES					USES				
OHCS GHAP:	\$ 200,000			Land Costs:	\$ 0				
OHCS HELP:	\$			Hard Costs:	\$ 5,166,277				
OHCS WX:	\$			Soft Costs:	\$ 2,272,713				
Local Government Resources:	1	\$			TOTAL USES:	\$ 7,438,990			
	2	\$							
	3	\$			DCR:	1.14			
Mortgage Loan(s):	\$ 915,000								
Tax Credit Equity	\$ 5,862,807								
Other funds:	\$ 461,183								
TOTAL SOURCES:	\$ 7,438,990								
Other Non-cash Contributions:	\$ 300,000								

NARRATIVE(S)	
Project Description:	This is a proposed new construction project consisting of seven buildings (five residential, one community, and one maintenance building) containing a total of 38 residential units. Buildings are of wood frame, garden walkup design, consisting of one and two stories. Unit types include one, two and three bedroom. Unit amenities include thru-wall HVAC, patio/balcony, dishwashers, and washer/dryer hookups. Total parking is 62 spaces per code, or 1.6 spaces per



Multi-Family Development Project Summary
OHCS 2013 Notice of Funds Availability (NOFA)

	<p>unit. Improvements rest on 2.72 acres of land, which was donated at an estimated cost of \$300,000. All utilities are, or will be, available to the site. All necessary commercial and public services are located nearby, primarily in La Grande.</p>
<p>Sponsor/Developer Profile & History:</p>	<p>The sponsor is Northeast Oregon Housing Authority (NEOHA) which is a Regional Housing Authority formed in 1977. It serves Baker, Grant, Union and Wallowa counties. The organization has developed, owned and managed projects since 1983, and currently has 266 units in their portfolio. The organization has prior experience with OHCS funding including LIHTC, OAHTC, HDGP and HOME. Two recently completed projects include Strawberry Village (10 units) in Prairie City and Richland School (10 units) in Richland.</p>
<p>Community Need:</p>	<p>Blue Springs Crossing is family housing project located in Union County in Island City. Seventy-five percent of low-income renter households in Island City are housing burdened compared with 64% in the Eastern Region. Furthermore, Union County has 17.5% of the region’s need compared with 14.3% of the region’s total affordable housing units. Housing condition has also been identified as an issue with the existing housing stock, with 31% of the housing in the county built before 1950 versus just 27% in the region. Though a few projects have been</p>
<p>Resident Services and Committed Partnerships for Successful Residency:</p>	<p>The targeted populations are low-income family, individuals, elderly and disabled plus several additional populations. Many tenants are expected to receive Section 8 tenant based vouchers. NEOHA will determine specific needs of tenants and then design the service plan accordingly.</p> <p>Family self-sufficiently including training in nutrition, avoiding domestic violence and child abuse, leadership skills and peer-to-peer counseling. Several other resource referrals will be available both on and offsite such as financial assistance, credit counseling, parent education, employment assistance, and temporary financial assistance.</p> <p>Additionally, onsite social gatherings and activities, a quarterly newsletter, and possibly daycare are either planned or being considered. NOHA will also partner with other service providers and agencies such as Community Connections.</p>
<p>Community Impact:</p>	<p>Blue Springs Crossing will bring workforce families close to the jobs and services they need, reducing commute time to outlying areas and de-concentrating poverty. The project will help stabilize the local economy through creation of jobs, housing and more local residents. Workforce Housing is identified as a “weakness” in Union County by the regional economic development district. Two of the units are designed to serve in-home childcare services, promoting a supportive, healthy neighborhood. The housing authority has committed to 10</p>



Multi-Family Development Project Summary
OHCS 2013 Notice of Funds Availability (NOFA)

Conditions:	Meets all programmatic, reservation letter and OHCS requirements.
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Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

PROJECT SUMMARY										
Region:	Central				Project Number:	3129				
Project Name:	Greeley Heights				County:	Jefferson				
Project Address:	Bear Drive & Jefferson Street, Warm Springs, OR 97761				Total # of Units:	35				
Sponsor Name:	Warm Springs Housing Authority Limited Partnership 1				Construction Type:	New Construction				
Target Population:	Large families with children				# of Years Affordable:	60				
Basis Boost Requested: Y/N	Yes (QCT)				Census Tract Poverty Rate:	37.2%				
Total # of Units by Type and AMI:										
Studio:		2-Br:		3-Br:	15	4-Br:	15	5-Br:	5	
AMI:		AMI:		AMI:	30-60%(15)	AMI:	50-60% (15)	AMI:	60% (5)	

SOURCES & USES										
OHCS LIHTC Allocation:					\$ 867,712					
OHCS OAHTC Allocation:					\$					
SOURCES					USES					
OHCS GHAP:	\$				Land Costs:	\$ 0				
OHCS HELP:	\$				Hard Costs:	\$ 7,542,873				
OHCS WX:	\$				Soft Costs:	\$ 1,639,984				
Local Government Resources:	1	\$			TOTAL USES:	\$ 9,182,857				
	2	\$								
	3	\$			DCR:	1.20				
Mortgage Loan(s):	\$									
Tax Credit Equity	\$ 7,114,525									
Other funds:	\$ 2,068,332									
TOTAL SOURCES:	\$ 9,182,857									
Other Non-cash Contributions:	\$									

NARRATIVE(S)	
Project Description:	This is a proposed new construction project consisting of 35 single-family detached residences plus a community building, to be built on the Warm Springs Reservation. The project will contain fifteen (15) 3-bedroom units (1,344 s.f.), fifteen (15) 4-bedroom units (1,455 s.f.) and five (5) five-bedroom units (1,622 s.f.). One of the three-bedroom units is designated as a manager's unit. Each house will have an attached 400 s.f. garage plus one additional outside parking space. Units will be both one and two story construction. Construction is slab-on-grade, wood frame with heat pumps and in-unit washer/dryers.



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

	<p>The project will rest on 37.37 acres of reservation land. The Warm Springs Housing Authority will lease the land to Warm Springs Housing Authority Limited Partnership 1. The lease is subject to approval and recording with the Bureau of Indian Affairs (BIA). The investor is requiring an ALTA survey at partnership closing. All necessary commercial, public services and recreational amenities are located nearby and typical of a smaller community.</p> <p>All 35 units will potentially have a form of project based assistance via a Housing Assistance Payment Agreement (HAP). Assistance is from Warm Springs Housing Authority for up to \$250 per unit per month on an “as needed” basis only. The subsidy is not guaranteed to a particular unit or tenant.</p> <p>An Operating Deficit Guaranty will be in place at closing whereby the housing authority guarantees to make the partnership whole if there are any operating deficits.</p> <p>The Native American Housing Assistance and Self Determination Act (NAHASDA) will be used to fund part of the project. This requires that tenants pay no more than 30% of adjusted gross income. Annual NAHASDA funds can also be used to financially support the HAP.</p> <p>Following Year 15, the project is structured as an eventual tenant ownership project with tenants allowed to acquire the homes.</p>
<p>Sponsor/Developer Profile & History:</p>	<p>Warm Springs Housing Authority is the designated housing entity for the Confederated Tribes of the Warm Springs Reservation. It was formed in the late 1960s and has since developed and managed tribal housing. The portfolio size is over 260 units with 60 of the units conveyed to home ownership. The housing authority will act as the developer for this project.</p> <p>The developer has assembled a strong development team. Travois, Inc. is the consultant and the company has structured more than 160 similar LIHTC projects with other tribes and tribal housing authorities since 1995. Travois will also assist with asset management, compliance consulting, architecture and construction inspections.</p>
<p>Community Need:</p>	<p>Greeley Heights is a family and physically disabled project in Jefferson County in Warm Springs. Of the 37 current LIHTC projects in the region, none are located on the Warm Springs Reservation. The Warm Springs Reservation currently has substandard and overcrowded housing. Two percent of the housing on the reservation lacks complete plumbing compared with 0.2% in the county. In addition a capital needs assessment of housing in the area identified critical health and safety issues such as black mold, insufficient insulation, and mechanical systems that require replacement. Furthermore 15% of the homes are overcrowded compared with just 6% in the county as a whole.</p>
<p>Resident Services and Committed Partnerships for Successful Residency:</p>	<p>Tenant population is anticipated to be large, multi-generational tribal families with children. This population will also include many individuals with diabetes and its accompanying disabilities. Services will be directed at supporting long-term health and stability of residents and families. Warm Springs Housing Authority will manage and coordinate these extended services. Services will integrate with existing organizations such as Warm Springs Social Services, Warm Springs Child Welfare Protection, Credit Enterprises, Indian Health Services and many others. Primary services will include:</p> <ol style="list-style-type: none"> 1) Homeownership training 2) Maintenance education



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

	<ul style="list-style-type: none"> 3) Budgeting-debt management-credit counseling 4) Health services 5) Coordination with child services 6) Security and police services
<p>Community Impact:</p>	<p>Greeley Heights is an integral part of the Warm Springs Reservation revitalization effort, and offers increased opportunity for exercise, cultural appreciation, decreased commute times and access to quality education. Families will live within walking distance of the Tribal Health and Wellness Center, and new K-8 school. The Warm Springs Housing Authority is investing over \$2M in Native American Housing Assistance and Self Determination Act (NAHASDA) funds to support this project. This innovative effort is the first in Oregon to develop a comprehensive homeownership conversion plan that will allow the units to be conveyed to tenants at an affordable price.</p>
<p>Conditions:</p>	<p>Meets all programmatic, reservation letter and OHCS requirements.</p>



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

PROJECT SUMMARY									
Region:	Metro			Project Number:	3115				
Project Name:	Ikoi-So			County:	Clackamas				
Project Address:	1550 SE Oak Grove Blvd, Milwaukie OR 97267			Total # of Units:	35				
Sponsor Name:	Northwest Housing Alternatives, Inc.			Construction Type:	Acquisition Rehab				
Target Population:	Elderly Disabled			# of Years Affordable:	60				
Basis Boost Requested: Y/N	Y			Census Tract Poverty Rate:	7.5%				
Total # of Units by Type and AMI:									
Studio:		1-Br:	34	2-Br:		3-Br:		4-Br:	
AMI:		AMI:	50% (34)	AMI:		AMI:		AMI:	

SOURCES & USES									
OHCS LIHTC Allocation:					\$355,408				
OHCS OAHTC Allocation:					\$1,575,000				
SOURCES					USES				
OHCS GHAP:	\$200,000			Land Costs:	\$2,005,000				
OHCS HELP:	\$			Hard Costs:	\$1,985,434				
OHCS WX:	\$			Soft Costs:	\$1,656,238				
Local Government Resources:	1	\$500,000			TOTAL USES:		\$5,646,672		
	2	\$			DCR:	1.22			
	3	\$							
Mortgage Loan(s):	\$1,575,000								
Tax Credit Equity	\$3,198,350								
Other funds:	\$173,322								
TOTAL SOURCES:		5,646,672							
Other Non-cash Contributions:	\$								

NARRATIVE(S)	
Project Description:	Ikoi-So is an existing two story multi-family apartment building located in unincorporated community of Oak Grove adjacent to Milwaukie. Ikoi-So was well-designed for seniors and individuals with a disability. Original features of the design include an elevator, secure entry, eight (8) fully-accessible ADA units, ample outdoor and green space, and a large community room. Elements that NHA will add or upgrade as part of the rehab are:



Multi-Family Development Project Summary

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	<p>Additional Amenities</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Resident Services Office <input checked="" type="checkbox"/> Community Garden <input checked="" type="checkbox"/> Grab Bars and ADA Height Toilets in Each Unit <input checked="" type="checkbox"/> New Accessible Egress on the West Side <input checked="" type="checkbox"/> Wireless Internet and Computer Stations <p>Improved Existing Features</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Elevator Modernization <input checked="" type="checkbox"/> Improved HVAC Systems <input checked="" type="checkbox"/> Improved Keyless Front Entry and Security Systems <input checked="" type="checkbox"/> Improved Lighting in Units and Common Areas <input checked="" type="checkbox"/> Eight (8) Fully-Accessible Units
<p style="text-align: center;">Sponsor/Developer Profile & History:</p>	<p>Northwest Housing Alternatives (NHA) is a highly successful nonprofit community development corporation formed thirty years ago. Their mission is “to provide opportunity through housing,” and reports that they are Oregon’s largest statewide nonprofit owner/developer of affordable housing.</p> <p>NHA owns, builds and rehabilitates affordable rental housing for a broad range of Oregonians: seniors, families and people with disabilities and special needs. They also operate an emergency shelter for homeless families with children. NHA’s current portfolio includes 1,794 units in 98 different properties in 17 Oregon counties. These apartments provide stable homes to over 2,500 Oregonians. In recent years, NHA’s experience includes large tax credit projects for families and seniors, Section 8 Preservation acquisition/rehabs, group homes and small scale multi-family projects for people with special needs. Of particular relevance to Ikoi-So is their portfolio of affordable housing for seniors. NHA has developed a proficiency in building and managing senior properties. Their current senior portfolio includes 715 units in 13 buildings, including seven projects that they have built themselves. The rehab of an additional senior property Hollyfield Village was completed this fall. Additionally an elderly disabled new construction project was also completed this fall.</p> <p>NHA has matured as an organization, have developed staff capacity, grown their balance sheet and stayed active, even during difficult economic times. Since 2009, they have been able to finance and complete eleven LIHTC projects.</p>
<p style="text-align: center;">Community Need:</p>	<p>Ikoi-So Terrace is an elderly and disabled preservation project located in Clackamas County in the city of Milwaukie. Clackamas County is under-served with affordable housing, representing over 16% of the region’s need compared with just 10% of the region’s total affordable housing units. With over 1,700 senior households in Milwaukie, a full sixty percent the households earn under 60% of county median family income, compared with 54% in the county and just 55% in the region. Milwaukie has higher percentages of extremely low-income households with 20% of their households earning under 30% of county median income compared with 15% in the region as a whole.</p>
<p style="text-align: center;">Resident Services and Committed Partnerships for Successful Residency:</p>	<p>A full Resident Services Plan will consist of two steps. First, well in advance of a building’s opening, the Resident Services Director will begin to study similar NHA properties and contact appropriate community service providers to gather data specific to the location</p>



Multi-Family Development Project Summary OHCS 2013 Notice of Funds Availability (NOFA)

	<p>and target population. This process is already well underway for Ikoi So and builds on NHA's robust partnerships with other community-based organizations. They currently have more than 35 strong partners in Portland and the surrounding suburban communities meeting resident needs for nutrition, healthcare, transportation, recreation, education and socialization services. In Ikoi So's case, they undertook a data collection and research process which included consulting with current onsite staff, as well as resource directories to identify community service providers serving our target population. We also reached out to partners such as the Milwaukie Senior Center, Commodity Supplemental Food Program, and Clackamas County Social Services. These partners have a specific knowledge of the needs of Ikoi So residents, in addition to being well versed in offering a wide variety of existing and available services to seniors.</p>
<p style="text-align: center;">Community Impact:</p>	<p>Ikoi-So Terrace is located in an area poised for revitalization with the upcoming MAX light-rail line currently under construction and the McLoughlin Area Plan gaining momentum. This project will preserve the existing Section 8 contract for 20 years, providing a full-time Resident Services Coordinator on site to support seniors aging in place. The project meets many local, county and statewide goals and is supported by \$500,000 in HOME funds from Clackamas County. Ikoi-So Terrace is a HUD 202 project, and will be the first project in Oregon to be refinanced under HUD's new rules.</p>
<p style="text-align: center;">Conditions:</p>	<p>Meets all programmatic, reservation and OHCS requirements</p>



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

PROJECT SUMMARY										
Region:	Valley				Project Number:	3112				
Project Name:	Julian Hotel Apartments				County:	Benton				
Project Address:	105 SW 2 nd Street Corvallis, Oregon 97333				Total # of Units:	35				
Sponsor Name:	Willamette Neighborhood Housing Services				Construction Type:	Rehabilitation				
Target Population:	Elderly/Disabled				# of Years Affordable:	60				
Basis Boost Requested: Y/N	Y				Census Tract Poverty Rate:	55.9%				
Total # of Units by Type and AMI:										
Studio:	5	1-Br:	30	2-Br:		3-Br:		4-Br:		
AMI:	50% (5)	AMI:	50% (29) + 1 Mgrs.	AMI:		AMI:		AMI:		

SOURCES & USES				
OHCS LIHTC Allocation:			\$594,442	
OHCS OAHTC Allocation:			\$1,077,399	
SOURCES			USES	
OHCS GHAP:	\$200,000		Land Costs:	\$2,027,500
OHCS HELP:	\$		Hard Costs:	\$3,605,041
OHCS WX:	\$92,757		Soft Costs:	\$2,616,577
Local Government Resources:	Corvallis CDBG	\$100,000	TOTAL USES:	\$8,249,118
	Corvallis HOME	\$595,000		
			DCR:	1.2
Mortgage Loan(s):	\$1,464,032			
Tax Credit Equity	\$5,408,885			
Other funds:	\$388,444			
TOTAL SOURCES:	\$8,249,118			
Other Non-cash Contributions:	\$			



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

NARRATIVE(S)	
Project Description:	<p>Julian Hotel Apartments is historical building of wood and brick construction built as a hotel in 1893 and converted to residential housing in 1985. The project is 4 stories with an elevator and 35 residential units including a single bedroom manager's unit. It is located on a 0.18 acre parcel in downtown Corvallis and includes commercial space on the ground floor. The project includes a community room, laundry room, a 24 hour on site manager and secure storage space.</p> <p>The location of the Julian Hotel Apartments is ideal for the senior community it serves. The project is within a mile of the Saturday Market, Riverfront Parks, the Arts Center, Corvallis Library as well as a variety of grocery stores, pharmacies and retail shopping.</p>
Sponsor/Developer Profile & History:	<p>Willamette Neighborhood Housing Services (WNHS) began acquiring affordable housing projects in 1993 and currently holds 389 affordable units. WNHS has experience funding project development and rehabilitation with a variety of resources including LIHTC, OAHTC, OHCS Trust Funds, OHCS and City of Corvallis HOME, CDBG, and FHLB; and have involved partnering with a number of lenders and investors.</p> <p>WNHS is a member of the NeighborWorks Network, a national affiliation of community development organizations committed to community development revitalization. Responsibilities of membership include adherence to high standards of governance, management and operation and includes participation in periodic on-site performance review by NeighborWorks.</p>
Community Need:	<p>Julian Hotel Apartments is an elderly project located in Benton County in the city of Corvallis. Seventy-seven percent of low-income renter households in Albany are housing burdened compared with 74% in the Valley/North Coast Region. Furthermore, Corvallis has 9.6% of the region's need compared with 3.8% of the region's total affordable housing units. The Julian Hotel Apartments will preserve 34 units of rental subsidy for households, the majority of which currently earn under 30% of area median income. Ninety-four percent of the cities households earning 30% less of county median family income are housing burdened, compared with 85% in the region as a whole. With a high 31% of the 18+ population are in poverty, the city of Corvallis has a demonstrated need for affordable housing for those with very low incomes.</p>
Resident Services and Committed Partnerships for Successful Residency:	<p>The population of the Julian Hotel Apartments is 75% disabled and 25% elderly. WNHS has identified the resident needs as assistance with filling out paperwork, communication with property management, case workers and others, housekeeping, transportation, financial education, accessing resources, support services and community engagement. To address these needs, the Julian Hotel Apartments will have a full-time Resident Services Coordinator to address resident needs, concerns or conflicts.</p> <p>WNHS will also be contracting with Community Outreach, Inc. for additional case management to assist the residents of the Julian Hotel Apartments and a community room is available to resident leaders interested in community and neighborhood issues such as resident safety and engagement and organizing community events.</p>
Community Impact:	<p>The Julian Hotel will preserve 34 project-based Section 8 vouchers at a time when increasing pressures from Oregon State University threaten the affordability of this property. Preserving rental assistance is identified as a key strategy in the community</p>



Multi-Family Development Project Summary OHCS 2013 Notice of Funds Availability (NOFA)

	Ten Year Plan to End Homelessness. The Julian's preservation is also a component of the Consolidated plan for the City of Corvallis, so the city has committed \$695,000 of HOME and CDBG towards the preservation of the Julian Hotel. The project also includes \$110,000 of other local funds. The Julian is located in downtown, with excellent access to mass transit and other
Conditions:	Meets all programmatic, reservation letter, and OHCS requirements.



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

PROJECT SUMMARY									
Region:	Metro			Project Number:	3065				
Project Name:	Glisan Commons Phase II Senior Housing			County:	Multnomah				
Project Address:	NE 99 th Ave and NE Glisan St. Portland, OR 97220			Total # of Units:	60				
Sponsor Name:	REACH Community Development, Inc.			Construction Type:	New Construction				
Target Population:	Seniors			# of Years Affordable:	60				
Basis Boost Requested: Y/N	N			Census Tract Poverty Rate:	18.7%				
Total # of Units by Type and AMI:									
Studio:		1-Br:	60	2-Br:		3-Br:		4-Br:	
AMI:		AMI:	30%-60%	AMI:		AMI:		AMI:	

SOURCES & USES									
OHCS LIHTC Allocation:				\$870,000					
OHCS OAHTC Allocation:				\$1,000,000					
SOURCES					USES				
OHCS GHAP:		\$200,000			Land Costs:		\$977,305		
OHCS HELP:		\$			Hard Costs:		\$10,807,834		
OHCS WX:		\$84,000			Soft Costs:		\$3,850,519		
Local Government Resources:		1	\$168,690		TOTAL USES:		\$15,635,659		
		2	\$		DCR:		1.60		
		3	\$						
Mortgage Loan(s):		\$5,385,295							
Tax Credit Equity		\$8,612,139							
Other funds:		\$1,185,535							
TOTAL SOURCES:		\$15,635,659							
Other Non-cash Contributions:		\$910,535							

NARRATIVE(S)	
Project Description:	Glisan Commons Phase II is a one building, 6 story, elevator equipped, 60 one bedroom unit, senior housing project designed for independent living. Located in the East Portland community it's served by public transportation, medical, grocery, retail, libraries and parks, social and recreational activities. It will include security, community room, outdoor space, parking, common laundry, kitchen, garden plots and leasing office.
Sponsor/Developer Profile & History:	The project is sponsored by REACH Community Development, Inc. and was established in 1982. With 100 staff, REACH has developed or preserved over 1,850 affordable units in 95 buildings including mixed use. They are nationally recognized and provide property management, maintenance and resident service programs. They are a designated CHDO



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

	and CBDO in the City of Portland, A CHDO in Washington County, and a chartered NeighborWorks American organization.
Community Need:	Glisan Commons Phase 2 is an elderly housing project located in Multnomah County in the city of Portland. The city of Portland represents 47% of the region's need for affordable housing and though it currently represents 66% of the region's existing affordable housing stock, the numeric need is tremendous. Multnomah County has experienced rapid growth in poverty, increasing 88% between 2000-2010; 75% of the counties low-income renters are burdened, compared with 73% in the Metro Region. Furthermore though the city of Portland has just 45% of the region's renters it is home to 50% of the region's extremely burdened renters. Portland itself is also home to over 22,000 (36% of the region's) low-income elderly households.
Resident Services and Committed Partnerships for Successful Residency:	REACH will contract with Human Solutions, Inc.(HSI) for resident services. All projects receive housing stability, eviction prevention, information and referral, crisis intervention with coordination of outside providers. HSI health related programs, income support, assistance with transportation, social and community engagement. Residents will have eviction prevention including move-in orientation, if necessary finding rental assistance, setting up payment plans. Residents will also have access and help with health care, health resources, and medical care.
Community Impact:	Glisan Commons Phase 2 will revitalize and catalyze development in the Gateway Regional Center. This project is Portland Housing Bureau's (PHB) number 1 priority in 2013 as it meets multiple objectives for transit-oriented development and exemplifies multi-organization collaboration between REACH CDC, Human Solutions, and Ride Connection. City of Portland committed \$6M of tax increment financing and \$4.1M of other investments including, land, SDC and property tax exemptions. Through innovative partnerships, Glisan Commons will help seniors age in place through on-site preventative health care, offering the amenities of assisted living at a fraction of the price.
Conditions:	Meets all programmatic, reservation letter, and OHCS requirements.



Multi-Family Development Project Summary OHCS 2013 Notice of Funds Availability (NOFA)

PROJECT SUMMARY									
Region:	Metro	Project Number:	3070						
Project Name:	Orchards at Orenco Phase I	County:	Washington						
Project Address:	NW 231 and NE Cherry Dr. Hillsboro, OR 97124	Total # of Units:	57						
Sponsor Name:	REACH Orenco LLC	Construction Type:	New Construction						
Target Population:	Family	# of Years Affordable:	60						
Basis Boost Requested: Y/N	N	Census Tract Poverty Rate:	4.5%						
Total # of Units by Type and AMI:									
Studio:		1-Br:	39	2-Br:	18	3-Br:		4-Br:	
AMI:		AMI:	30%- 50% (39)	AMI:	30%- 50% (18)	AMI:		AMI:	

SOURCES & USES				
OHCS LIHTC Allocation:		\$870,000		
OHCS OAHTC Allocation:		\$1,000,000		
SOURCES		USES		
OHCS GHAP:	\$200,000	Land Costs:	\$690,000	
OHCS HELP:	\$	Hard Costs:	\$9,173,762	
OHCS WX:	\$100,000	Soft Costs:	\$4,117,304	
Local Government Resources:	1	\$500,000	TOTAL USES:	
	2	\$300,000	\$13,981,066	
	3	\$260,000	DCR:	1.20
Mortgage Loan(s):	\$3,825,148			
Tax Credit Equity	\$8,612,139			
Other funds:	\$183,779			
TOTAL SOURCES:		\$13,981,066		
Other Non-cash Contributions:	\$300,000			

NARRATIVE(S)	
Project Description:	Located in Hillsboro The Orchards at Orenco Phase I is a new construction, 57 one and two bedroom units, one building, three story elevator served project for families at 30% and 50% AMI with 8-Section 8 PBA units. The project will include a community room, common laundry per floor, playground, security locks, garden plot, and parking. The project is located near Orenco MAX station, schools, medical, groceries, churches, nature park and businesses.
Sponsor/Developer Profile & History:	The project is sponsored by REACH Community Development, Inc. and was established in 1982. With 100 staff, REACH has developed or preserved over 1,850 affordable units in 95 buildings including mixed use. They are nationally recognized and provide property management, maintenance and resident service programs. They are a designated CHDO



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

	and CBDO in the City of Portland, A CHDO in Washington County, and a chartered NeighborWorks American organization.
Community Need:	Orchards at Orenco is a family housing project located in Hillsboro, in Washington County. Seventy-eight percent of low-income renter households in Hillsboro are housing burdened compared with 73% in the Metro Region. Hillsboro has 4.6% of the region's need compared with 3.8% of the region's total affordable housing units and 3.5% of the region's recently funded affordable housing. Job growth is projected to soar in the high tech sector which generates economic activity that creates substantial demand for support services. These factors dramatically increase the need for affordable housing in a community like Orenco Station where affordable workforce housing is currently lacking.
Resident Services and Committed Partnerships for Successful Residency:	All projects receive housing stability, eviction prevention, information and referral, crisis intervention with coordination of outside providers. REACH will also incorporate education/student services, financial services, employment, home buying, commuting support, and healthy homes focus.
Community Impact:	Orenco Station is a nationally recognized model of New Urbanism and it is within a Washington County "High Opportunity Area". Orchards at Orenco supports the County Consolidated Plan and will deconcentrate poverty by serving the workforce population earning 50% MFI or less. There is significant leverage with \$1.5M in HOME from the County, along with 8 Project Based Section 8 Vouchers over 10 years equal to \$768,960. The project is on the site of the early 20 th century Oregon Nursery Company (ORENCO). The development team will enhance the historic nature of the property. In addition, Meyer Memorial Trust has invested to meet innovative Passive House sustainability standards.
Conditions:	Meets all programmatic, reservation letter, and OHCS requirements.



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

PROJECT SUMMARY									
Region:	Southern			Project Number:	3126				
Project Name:	Parkview Terrace			County:	Josephine				
Project Address:	1238 Fruitdale Drive, Grants Pass, OR 97526			Total # of Units:	50				
Sponsor Name:	Housing Authority of Jackson County			Construction Type:	New Construction				
Target Population:	Family/Domestic Violence			# of Years Affordable:	60				
Basis Boost Requested: Y/N	Y			Census Tract Poverty Rate:	24.6%				
Total # of Units by Type and AMI:									
Studio:		1-Br:	10	2-Br:	28	3-Br:	12	4-Br:	
AMI:		AMI:	50%-60% (10)	AMI:	50%-60% (28)	AMI:	50%-60% (12)	AMI:	

SOURCES & USES									
OHCS LIHTC Allocation:					\$845,649				
OHCS OAHTC Allocation:					\$1,500,000				
SOURCES					USES				
OHCS GHAP:	\$			Land Costs:	\$574,779				
OHCS HELP:	\$			Hard Costs:	\$6,486,260				
OHCS WX:	\$			Soft Costs:	\$2,754,158				
Local Government Resources:	1	\$			TOTAL USES:	\$9,814,197			
	2	\$			DCR:	1.43			
	3	\$							
Mortgage Loan(s):	\$1,500,000								
Tax Credit Equity	\$8,032,862								
Other funds:	\$281,335								
TOTAL SOURCES:	\$9,814,197								
Other Non-cash Contributions:	\$								

NARRATIVE(S)	
Project Description:	Located in Grants Pass, Parkview Terrace is a new construction, fifty unit, eight building, 1, 2, and 3-bedroom, workforce family project serving 50% and 60% AMI with 12 Section 8 vouchers. PBV units will be targeted to 30% rents. It will include a community room, playground, garden plots, leasing office, and individual unit ventilation. Close to the downtown core, it's located in a multifamily and single family home neighborhood with access to schools, services, employment, shopping, public transportation, recreation, parks, and groceries.
Sponsor/Developer Profile & History:	The Housing Authority of Jackson County (HAJC) was incorporated in 1969 and will serve as Sponsor, Developer, and Managing Agent. HAJC is the region's largest affordable



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

	<p>developer and operator with 1,300 affordable units. HAJC is experienced with all OHCS funding sources and has five distinct departments including development, accounting, property management, maintenance, and resident services.</p>
<p style="text-align: center;">Community Need:</p>	<p>Parkview Terrace is a project for family and survivors of domestic violence in Josephine County, in Grants Pass. Josephine County is under-served with affordable housing, representing over 18% of the region's need compared with just 12% of the region's total affordable housing units and 4% of the recently funded affordable housing. Seventy-eight percent of the low-income households are rent burdened, compared with just 75% in the county as a whole. Though the Grants Pass Women's Crisis Support indicated more than 200 survivors of domestic violence served in 2012, there are no dedicated units to serve this population in the city or the county.</p>
<p style="text-align: center;">Resident Services and Committed Partnerships for Successful Residency:</p>	<p>HAJC will incorporate resident services including employment, computer literacy, life skills, financial literacy, homeownership, and youth enrichment. They have a partnership with Rogue Community College (RCC) to bring computer training into the community building or RCC campus. HAJC will also team with the Women's Crisis Support Team (WCST) to bring counseling, support meetings, local referrals, classes and seminars. HAJC also coordinates with community service providers to offer first aid, CPR, credit enhancement and counseling, career building, dress for success, health and wellness, and YMCA for family and kids.</p>
<p style="text-align: center;">Community Impact:</p>	<p>Josephine County is a HUD designated Difficult to Develop Area (DDA). Parkview Terrace will bring new vitality to a blighted neighborhood, replacing an abandoned construction site, and taking advantage of \$250,000 savings in infrastructure costs. The project has secured 12 Project Based Section 8 Vouchers, amounting to more than \$1.7M in rental subsidy. The site is located in an ideal location for families with children, adjacent to a city park, two blocks from an elementary school and one mile from the downtown core of Grants Pass. The project will integrate craftsman-style architecture and seek an Earth Advantage Gold Certification.</p>
<p style="text-align: center;">Conditions:</p>	<p style="text-align: center;">Meets all programmatic, reservation letter, and OHCS requirements.</p>



Multi-Family Development Project Summary OHCS 2013 Notice of Funds Availability (NOFA)

PROJECT SUMMARY									
Region:	Metro	Project Number:	3117						
Project Name:	Rosewood Plaza	County:	Multnomah						
Project Address:	18155 NE Couch St, Gresham, OR 97030	Total # of Units:	45						
Sponsor Name:	Human Solutions	Construction Type:	New Construction						
Target Population:	FAM	# of Years Affordable:	60						
Basis Boost Requested: Y/N	N	Census Tract Poverty Rate:	31.2%						
Total # of Units by Type and AMI:									
Studio:		1-Br:	11	2-Br:	27	3-Br:	4	4-Br:	3
AMI:		AMI:	30%- 60% (11)	AMI:	30%- 60% (27)	AMI:	30%- 60% (4)	AMI:	30%- 60% (3)

SOURCES & USES									
OHCS LIHTC Allocation:					\$870,000				
OHCS OAHTC Allocation:					\$1,320,110				
SOURCES					USES				
OHCS GHAP:	\$200,000				Land Costs:	\$1,368,061			
OHCS HELP:	\$				Hard Costs:	\$6,220,227			
OHCS WX:	\$76,726				Soft Costs:	\$3,155,795			
Local Government Resources:	1	\$415,000			TOTAL USES:	\$10,744,083			
	2	\$				DCR:	1.30		
	3	\$							
Mortgage Loan(s):	\$1,320,110								
Tax Credit Equity	\$8,525,147								
Other funds:	\$207,100								
TOTAL SOURCES:	\$10,744,083								
Other Non-cash Contributions:	\$								

NARRATIVE(S)	
Project Description:	<ul style="list-style-type: none"> Acquisition & Rehab of 26 existing units and new construction of 19 new units. New 4 story building will contain two commercial tenants (a dental practice and its parent company offices) in addition to all new residential units. The building will be divided into two separate condominiums at completion (one commercial and one residential). The existing facility is comprised of two buildings (32 years old). Current tenants are low and very low income households. The existing units were recently purchased by Human Solutions. Significant deferred maintenance will be addressed in this rehab – including safety and code



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

	<p>violations.</p> <ul style="list-style-type: none"> • Location is 2 blocks from light rail, one block from buses and within walking distance of grocery stores, pharmacies and schools.
<p>Sponsor/Developer Profile & History:</p>	<p>Human Solutions, Inc (HSI) (Nonprofit) has developed 608 units in 17 projects for very low income families in East Multnomah County since 1988 (not including 67 units currently under construction). Development consultant will be Housing Development Center. HDC has completed development work on 2,800 units of housing for families, seniors, the homeless and special needs populations including 23 LIHTC projects. As a consultant, HDC will stay involved in the development process through stabilization and beyond. Walsh Construction will be General Contractor and Affinity will be property manager. Both have been engaged to assist with cost estimates. Kanto Taylor Nelson Boyd & Evatt PC will serve as legal counsel for HIS. Kantor Taylor is recognized as one of the most experienced law firms with LIHTC in the Northwest region.</p>
<p>Community Need:</p>	<p>Rosewood Plaza is a family housing project in Multnomah County, in the city of Gresham. 79% of low-income renter households in Gresham are housing burdened compared with 73% in the Metro Region. Furthermore, Gresham has 7.3% of the region's need compared with 4.6% of the region's total affordable housing units. At 54%, the rate of population growth in the city of Gresham is more than twice the rate of growth in the county as a whole, reflected in the large wait lists (exceeding 175 households) at the three existing Human Solutions projects in Gresham.</p>
<p>Resident Services and Committed Partnerships for Successful Residency:</p>	<p>HSI has outlined a comprehensive Resident Services plan tailored to the specific population they will serve. This includes a health initiative partnered with local medical providers, bi-lingual services, Information and Resource Referrals, Eviction Prevention, Free Summer Lunch for Youth, Community Meals, Fitness programs, Cooking Classes, and a Parent Support Group. A Fitness center and community room as well as a complete dental office (leased to Wallace Medical Concern) will be housed in the new building. Residents will also be able to utilize programs available at many of HSI's nearby facilities.</p>
<p>Community Impact:</p>	<p>Rosewood Plaza combines rehabilitation and new construction to revitalize a blighted part of Rockwood where more than half of the children are below poverty. The project will serve large families with significant unmet health care needs through a cooperative agreement with a neighboring building, offering shared amenities. A partnership with Wallace Medical will allow residents of both Rosewood Plaza and the Rockwood Building to have unparalleled access to vital health care to help improve housing stability, economic prospects and opportunities to escape poverty. Rosewood Plaza provides increased density through creative infill with excellent transit access, and leverages \$365,000 in (Gresham) HOME funds.</p>
<p>Conditions:</p>	<p>Meets all programmatic, reservation letter and OHCS requirements</p>



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

PROJECT SUMMARY									
Region:	Metro			Project Number:	3069				
Project Name:	The Barcelona at Beaverton			County:	Washington				
Project Address:	12025 SW 2 nd Street, Beaverton 97005			Total # of Units:	47				
Sponsor Name:	Community Partners for Affordable Housing			Construction Type:	New Construction				
Target Population:	Workforce & Elderly			# of Years Affordable:	60				
Basis Boost Requested: Y/N	Y			Census Tract Poverty Rate:	16.9%				
Total # of Units by Type and AMI:									
Studio:	3	1-Br:	41	2-Br:	3	3-Br:		4-Br:	
AMI:	50% (2)	AMI:	50% (40)	AMI:	50% (2)	AMI:		AMI:	
	60%(1)		60%(1)		60% (1)				

SOURCES & USES									
OHCS LIHTC Allocation:				\$820,000					
OHCS OAHTC Allocation:				\$800,000					
SOURCES					USES				
OHCS GHAP:		\$			Land Costs:		\$495,000		
OHCS HELP:		\$			Hard Costs:		\$6,357,316		
OHCS WX:		\$			Soft Costs:		\$3,813,369		
Local Government Resources:	1	\$443,000			TOTAL USES:		\$10,665,685		
	2	\$1,500,000			DCR:		2.21		
	3	\$							
Mortgage Loan(s):		\$800,000							
Tax Credit Equity		\$7,829,217							
Other funds:		\$93,468							
TOTAL SOURCES:		\$10,665,685							
Other Non-cash Contributions:		\$							

NARRATIVE(S)	
Project Description:	<p>The Barcelona at Beaverton will be a newly constructed four story apartment building in downtown Beaverton, Washington County. The building consists of forty-seven (47) units, 41 one-bedrooms, 3 two-bedrooms and 3 studio units, together with community rooms, an office and laundry rooms. 8 units will Section 504 accessible, including 1 with sight and hearing impaired features. The Project will be designed and constructed to Enterprise Green Communities standards. Units are arranged to maximize views and natural light. Outdoor balconies are provided for every apartment, arranged with overhangs and privacy screens to ensure shading of windows and minimum solar heat gain in summer</p>



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

	months.
<p style="text-align: center;">Sponsor/Developer Profile & History:</p>	<p>CPAH has seven projects in Eastern Washington County and Southwest Portland. Five are LIHTC projects, two are HUD projects, and four of the seven are new construction. All have incorporated a variety of local, state and federal funding sources, as well as private sector loans, equity, and foundation support. The portfolio is performing well fiscally and physically, and the agency is a trusted member of local communities. The five key professionals developing this Project have an aggregate of over ninety-five years of experience in their respective industry-specific professions. CPAH's integrated development team of professionals have lengthy successful careers in affordable housing and the funding sources being requested for this Project. They are legal counsel Doug Blomgren/Bateman Seidel, architect, Brian Carleton/Carleton Hart Architecture, management agent, Jeff Reingold/IPM , general contractor Chris Duffin/LMC and CPA Janice Romano.</p>
<p style="text-align: center;">Community Need:</p>	<p>The Barcelona at Beaverton is a workforce and elderly project located in the city of Beaverton in Washington County. Beaverton has 6.9% of the region's need compared with 4.9% of the region's total affordable housing units. Washington County is anticipated to experience rapid population growth, further increasing the demand for affordable housing. Metro's Regional Housing Choice Implementation Strategy's "Benchmark Affordable Housing Needs to 2017" list Beaverton and Portland as the two cities with the highest unmet need in the region.</p>
<p style="text-align: center;">Resident Services and Committed Partnerships for Successful Residency:</p>	<p>CPAH has existing contractual agreements with Community Action and the HopeSpring Program of Lutheran Community Services NW to provide case management, along with rental subsidy and other financial and clinical supports as needed. These agreements help those households with higher barriers to housing due to domestic violence, substance abuse, or other mental health issues to be successful in meeting the terms of their lease and in improving their overall stability with employment, improved health, and development of a support system. There is a contractual agreement with Oregon Food Bank at other sites and are beginning to explore whether it would be possible to provide an onsite food distribution at the Barcelona. Washington County's Ten Year Plan to End Homelessness includes increasing food resources on site at low-income housing sites as one of its strategies.</p> <p>CPAH relies on a variety of additional partnerships that do not have contractual agreement, but will significantly enhance resident services at the Barcelona. Those include: Tualatin Hills Parks and Recreation District to provide outreach at the Barcelona regarding activities at the nearby Elsie Stuhr Center (Senior Center and Loaves & Fishes site), Beaverton Police Department to provide detailed information on police calls and any incidents occurring onsite, OSU Extension Services to provide nutrition education classes, the Washington County Department of Aging and Veteran Services (DAVS) to provide resources to residents, and the Beaverton School District to provide summer lunch program, caring closet and other resources to any Barcelona residents with school-age children.</p>
<p style="text-align: center;">Community Impact:</p>	<p>The Barcelona at Beaverton is a catalyst urban renewal project with supports for seniors to age-in-place and for younger adults with mobility impairments; it is also a workforce area where residents will be able to walk, bike or bus to work. The Neighborhood Health Center will be located in the building to meet the needs of residents. This is a project of significance meeting regional, county and city goals and with investment from multiple partners. A heavy emphasis is placed on environmental stewardship, energy and water</p>



Multi-Family Development Project Summary OHCS 2013 Notice of Funds Availability (NOFA)

	efficiency, air and water quality, urban habitat, and access to alternative transportation, exceeding the Enterprise Green Communities standards.
Conditions:	Meets all programmatic, reservation letter and OHCS requirements.



Multi-Family Development Project Summary OHCS 2013 Notice of Funds Availability (NOFA)

PROJECT SUMMARY									
Region:	Mid-Willamette Valley	Project Number:	3079						
Project Name:	Woodland Square	County:	Linn						
Project Address:	1415 Salem Ave SE, Albany 97321	Total # of Units:	54						
Sponsor Name:	Innovative Housing Inc.	Construction Type:	New Construction						
Target Population:	Family & Physically Disabled	# of Years Affordable:	60						
Basis Boost Requested: Y/N	Y	Census Tract Poverty Rate:	34.9%						
Total # of Units by Type and AMI:									
Studio:		1-Br:	9	2-Br:	36	3-Br:	6	4-Br:	3
		AMI:	1-30%	AMI:	2-30%	AMI:	1-30%	AMI:	1-30%
			3-50%		16-50%		2-50%		1-50%
			5-60%		18-60%		3-60%		1-60%

SOURCES & USES				
OHCS LIHTC Allocation:		\$870,000		
OHCS OAHTC Allocation:		\$815,000		
SOURCES		USES		
OHCS GHAP:	\$200,000	Land Costs:	\$588,750	
OHCS HELP:	\$	Hard Costs:	\$7,518,984	
OHCS WX:	\$	Soft Costs:	\$2,687,457	
Local Government Resources:	1	\$1,450,000	TOTAL USES:	
	2	\$	\$10,795,191	
	3	\$	DCR:	1.46
Mortgage Loan(s):	\$815,000			
Tax Credit Equity	\$8,090,191			
Other funds:	\$240,000			
TOTAL SOURCES:		\$10,795,191		
Other Non-cash Contributions:	\$			

NARRATIVE(S)	
Project Description:	<p>Woodland Square is new construction of workforce family housing that will include a unit mix with 1, 2, 3 and 4-bedroom options. Woodland Square will consist of 17 accessible/adaptable ground-floor units which will include in-unit washers/dryers, interior storage, dishwashers, durable finishes, front porches, private outdoor space (patio or deck), and secure outdoor storage closet.</p> <p>Woodland Square's traditional design, featuring craftsman detailing, is mindful of the surrounding neighborhood's historic character, easily blend into the existing community.</p>



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

	<p>Woodland Square will utilize Energy Star appliances and lighting, an ultra efficient building envelope, windows with high energy performance, covered bike parking, water saving fixtures, and landscaping with native plants that require minimal irrigation. The project will seek Earth Advantage Gold certification. The two acre development will incorporate and preserve many mature trees on the site and dedicate resources to restoring the Periwinkle Creek Canyon Area for the future benefit and enjoyment of the public. A community room, community kitchen, Resident Services office, Manager's office, ADA restroom, community patio, and children's playground will enhance both on-site programming and resident interaction.</p>
<p>Sponsor/Developer Profile & History:</p>	<p>Innovative Housing, Inc.'s (IHI) staff and board bring decades of real estate development, ownership, and management experience to bear on each of its projects. IHI owns and operates over 1,400 affordable units in Oregon and Washington. They currently have 116 units in development, including the proposed Woodland Square Project. IHI has over 25 years of housing management experience and IHI staff is familiar with a range of funding sources and has a demonstrated track record of compliance with multiple layered funding sources. IHI currently manages 10 limited partnerships and limited liability companies that own and operate 1,147 affordable rental units in Oregon and Washington. IHI is also the sole member of seven limited liability companies and owns and operates an additional 358 rental units either directly or through one of its wholly controlled LLCs. In 2012, our portfolio averaged a DCR of 1.81 and a 96% occupancy rate.</p> <p>IHI has the financial capacity and internal controls to successfully asset manage its properties while continuing to grow its portfolio and its balance sheet. As of June 30, 2012, IHI's consolidated balance sheet, exclusive of non-controlled limited partnerships and LLC's, had assets in excess of \$29 million and \$2.2 million cash in the bank.</p>
<p>Community Need:</p>	<p>Woodland Square is a family and physically disabled project located in Linn County within the city of Albany. Albany has 4.7% of the region's need compared with 0% of the region's recently funded affordable housing. Albany has experienced rapid population growth, and has job growth at rates above the entire region while also reporting a shortage of multifamily housing. Furthermore, the housing stock in the Woodland Square Census Tract is deteriorated; having a median year built of 1944 compared with 1976 in Linn County.</p>
<p>Resident Services and Committed Partnerships for Successful Residency:</p>	<p>Resident Services staff will initially provide updated information on local K-12 schools and educational opportunities, parenting and family support programs, youth resources, homeownership education, accessing higher education and financial aid, job training, employment assistance, creating healthy lifestyles, civic engagement, financial education, rent and utility assistance, food resources, domestic violence, addiction services and mental health. Please see the attached Albany Services list for a sample of updated resources currently available to IHI's target market in Albany.</p> <p>Innovative Housing expects that many of our residents will be Spanish-speaking families who are not fluent in English and therefore will hire a bilingual (English/Spanish) on-site Resident Services Coordinator for 15-20 hours per week who will provide direct services and resource referrals to Woodland Square's 54 resident households.</p>
<p>Community Impact:</p>	<p>Woodland Square will redevelop a blighted mobile home park within the Central Albany Revitalization Area, utilizing urban renewal funds. The mixed-income project is located within five blocks of Albany's Downtown Historic Business District which features additional retail and employment opportunities. The central location allows for maximum accessibility to services, employment, and amenities for residents. Craftsman design complements the historic neighborhood and will seek Earth Advantage Gold Certification. In addition to meeting local housing goals, this project meets statewide planning objectives by</p>



Multi-Family Development Project Summary OHCS 2013 Notice of Funds Availability (NOFA)

	incorporating and preserving many mature trees on the site, including restoration of the adjacent Periwinkle Creek Canyon.
Conditions:	Meets all programmatic, reservation letter and OHCS requirements.



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

PROJECT SUMMARY									
Region:	Metro			Project Number:	3088				
Project Name:	Heritage Heights			County:	Wasco				
Project Address:	1324 W 10 th St, The Dalles, OR 97058			Total # of Units:	24				
Sponsor Name:	Columbia Cascade Housing			Construction Type:	New Construction				
Target Population:	FW			# of Years Affordable:	60				
Basis Boost Requested: Y/N	N/A			Census Tract Poverty Rate:	18.5%				
Total # of Units by Type and AMI:									
Studio:		1-Br:		2-Br:	17	3-Br:	2	4-Br:	1
AMI:		AMI:		AMI:	60% (17)	AMI:	60% (2)	AMI:	70% (1)

SOURCES & USES									
Farmworker Housing Tax Credits Allocation:					\$1,760,016				
OHCS OAHTC Allocation:					\$				
SOURCES					USES				
OHCS GHAP:	\$50,000			Land Costs:	\$390,000				
OHCS HOME:	\$910,000			Hard Costs:	\$3,807,064				
OHCS WX:	\$			Soft Costs:	\$1,786,928				
Local Government Resources:	1	\$239,976			TOTAL USES:	\$5,983,992			
	2	\$24,000			DCR:	1.41			
	3	\$							
Mortgage Loan(s):	\$3,000,000								
Tax Credit Equity	\$1,760,016								
Other funds:									
TOTAL SOURCES:	\$5,983,992								
Other Non-cash Contributions:	\$								

NARRATIVE(S)	
Project Description:	<ul style="list-style-type: none"> New construction of 8 buildings – including 23 residential units and one community center - made up of flats and townhomes. One residential building exists and is occupied. Housing will be provided for permanent farmworker households, 23 units will receive USDA-RD assistance. The site is within walking distance of shopping, parks, churches, schools and medical facilities.



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

	<ul style="list-style-type: none"> One unit will be dedicated to a migrant, farmworker family.
<p>Sponsor/Developer Profile & History:</p>	<p>Columbia Cascade Housing Corporation (CCHC) is a Nonprofit Community Development Corporation and designated CHDO, operating in Oregon and Washington, serving the housing and community development needs of low and moderate income people since 1990. During that time, CCHC 357 units in 22 affordable housing complexes – targeting the needs of farmworkers, low income families, seriously mentally ill, homeless, homeless youth, the elderly and frail elderly. CASA of Oregon has been contracted as the development consultant.</p>
<p>Community Need:</p>	<p>Heritage Heights is a farmworker project located in The Dalles in Wasco County. There is an affordability gap for farmworker families; the affordable rent for a farmworker family earning \$24,630 per year is \$616 per month, where the average market rent is \$800 per month. Though Wasco County has the largest number of agricultural workers in the region, with over 9,200 farmworkers, it has just 350 farmworker spaces of which only 33 are units of multi-family housing dedicated to farmworker families.</p>
<p>Resident Services and Committed Partnerships for Successful Residency:</p>	<p>CCHC will address the four observed needs of target households (Child Care, Health Care, Transportation, and Employment Services) on site in the community room and proposed community garden as well as off-site in partnering with the following local service providers (signed confirmation of Services agreements are in place):</p> <ul style="list-style-type: none"> Mid-Columbia Council of Governments: Work Source, The Link Bus The Next Door, Inc: Big Brother, Big Sister, Families First, Nuestra Comunidad Sana, Youth and Family Services, Anger Management Classes Oregon Department of Human Services: SNAP, JOBS (for TANF clients), Prevention Programs, Vocation Rehabilitation, Family Based Services, Child Care Subsidies, The Oregon Child Support Program, Medicaid (Oregon Health Plan. Mid-Columbia Children’s Council: Head Start, Early Head Start, ECEAP, OREGON PRE-K.
<p>Community Impact:</p>	<p>In Wasco County, agriculture is the top economic driver. Regional Solutions has identified workforce housing as the top priority in the region. The provision of affordable workforce housing, including farm worker housing, is one step toward keeping Wasco County competitive as an agricultural producer. Heritage Heights has \$4.7M in commitments through USDA-RD and Farmworker Housing Tax Credits (through OHCS). The project also received over \$100,000 of rental assistance for 23 units, ensuring the lowest income farmworkers will only ever pay 30% of their income for rent. The location is close to services and convenient for families who may not have a car.</p>
<p>Motion:</p>	<p>To approve a GHAP Grant in an amount up to \$50,000 and a HOME grant in an amount up to \$910,000 to Columbia Cascade Housing Corporation for the new construction of Heritage Heights located in the City of The Dalles, Wasco County, Oregon. Award is contingent on meeting all program requirements and conditions of this award.</p>
<p>Conditions:</p>	<p>Meet all programmatic, reservation letter, and OHCS requirements.</p>



Multi-Family Development Project Summary OHCS 2013 Notice of Funds Availability (NOFA)

PROJECT SUMMARY									
Region:	Eastern			Project Number:	3063				
Project Name:	Sunset Senior Housing II			County:	Umatilla				
Project Address:	Lot 4N 35CA Block 6, Athena, OR 97813			Total # of Units:	4				
Sponsor Name:	Sunset Housing Inc.			Construction Type:	New Construction				
Target Population:	Senior			# of Years Affordable:	60				
Basis Boost Requested: Y/N	NA			Census Tract Poverty Rate:	6.3%				
Total # of Units by Type and AMI:									
Studio:		1-Br:	4	2-Br:		3-Br:		4-Br.	
AMI:		AMI:	50% (4)	AMI:		AMI:		AMI:	

SOURCES & USES									
OHCS LIHTC Allocation:					NA\$				
OHCS OAHTC Allocation:					NA\$				
SOURCES					USES				
OHCS GHAP:	\$82,709			Land Costs:	\$23,040				
OHCS HOME:	\$600,000			Hard Costs:	\$500,010				
OHCS WX:	\$			Soft Costs:	\$218,325				
Local Government Resources:	1	\$23,000		TOTAL USES:	\$741,375				
	2	\$24,500			DCR:	NONE			
	3	\$11,166							
Mortgage Loan(s):	\$								
Tax Credit Equity	\$								
Other funds:	\$								
TOTAL SOURCES:	\$741,375								
Other Non-cash Contributions:	\$27,666								

NARRATIVE(S)	
Project Description:	Sunset Senior Housing II (SSH – II) is a single building containing 4 one-bedroom units, on a 6,000 sq. ft. lot in Athena, OR. The 4 units will compliment an existing 10 unit project and share community gardens, management office, and community space. It is located close to downtown and public amenities like groceries, bank, restaurants, library, parks, shops, public transportation, and hairstylists. The project will allow seniors to age in place near families and friends without having to relocate to outside community facilities.
Sponsor/Developer Profile & History:	Sunset Housing, Inc. was created in 2003 by local government leaders, business owners and residents of Athena to support senior housing in the community. The Board of Directors is “hands on” checking on residents and management of the existing 10 unit project, clear snow and help landscape. Being a small community board members live in close proximity



Multi-Family Development Project Summary

OHCS 2013 Notice of Funds Availability (NOFA)

	and hold monthly meetings if needed. Board members will work as the development team for construction decisions and work with the architect, contractor and other professionals involved in the project.
Community Need:	Sunset Senior Housing II is located in Umatilla County and creates 4 units of housing in Athena, Oregon. Umatilla County represents 39% of the region's need and is home to 2,981 or 34% of the region's low-income senior households. While the county has 44% of the region's affordable housing, it has received just 21% of the region's recently funded affordable housing units.
Resident Services and Committed Partnerships for Successful Residency:	SSH – II will serve residents 55 and over independent living with service support. Some may have a type of disability and most will need services including transportation, medical care access, prescription management, independent living skills, meal/food, respite care, legal and medical referrals, and counseling. CAPECO will team with residents of SSH - II and act as primary contact for other services as well as on site assessments, information on community providers, Meals-on-Wheels, case management, in home services, and public emergency assistance. Cascade Management will manage SSH – II and is familiar with project management in small communities and services in and around the surrounding area. Cascade Management will work with CAPECO to ensure ongoing exploration of residents needs
Community Impact:	Sunset Senior Housing II is the number 1 priority for the small, agricultural community of Athena. In Athena and other rural Oregon communities, seniors are too often forced to move away from families and support systems to live in distant cities where they have no connections. The project is located near Athena's main street, including many amenities and a bus stop that transports residents to nearby Pendleton and Walla Walla. The small town of 1,200 residents contributed \$58,666 to support the development of this project.
Motion:	To approve a GHAP grant in an amount up to \$82,709 and a HOME grant in an amount up to \$600,000 to Sunset Housing Inc. for the new construction of Sunset Senior Housing II, located in the City of Athena, Umatilla County, Oregon. Award is contingent on meeting all program requirements and conditions of this award.
Conditions:	Meets all programmatic, reservation letter, and OHCS requirements.

OHCS TRANSITION

Summary Status Report

November 1, 2013



Beginning in December 2012 at the direction of Governor Kitzhaber, Oregon Housing and Community Services Department embarked on a major transition planning effort aimed at developing new models of service delivery. The goal of this effort has been to drive better outcomes for low income Oregonians with the programs and services currently administered by OHCS, while addressing fiscal sustainability challenges inherent in the agency's business model. Key aspects of the planning effort include:

- Transparency and engagement with employees and partners at every state of the process, taking advantage of subject matter expertise in the industry and in the field
- Research and analysis of program data and the approaches used in other states
- Alignment with other transformation efforts taking place in state government, with an emphasis on creating new pathways to prosperity for all Oregonians
- Broad agreement on a set of guiding principles for the effort, along with an articulation of the future vision shared by employees, partners and stakeholders

OHCS Director Margaret Van Vliet has reviewed, organized and synthesized the work product and recommendations generated to-date; and will seek additional feedback before submitting recommendations to the Governor in mid-December and reporting to the Legislature in February 2014. Recommendations will fall in to three broad categories:

SCENARIOS: A total of ten alternative service delivery model scenarios across six programmatic areas: Multifamily finance, asset management and compliance, energy and weatherization, housing counseling, food security, preventing and ending homelessness.

PROGRAM ADMINISTRATION CHANGE IDEAS: Our process has yielded numerous ideas for general program change across several programmatic areas within the agency. These ideas warrant strong consideration and evaluation, but don't necessarily require significant policy change. If accepted, implementation of some program element changes could begin right away; others will be implemented over time.

STRATEGIC POLICY QUESTIONS: While it is clear there is an important role for the state to play in affordable housing and related safety net services, our process has identified three major strategic policy questions that if resolved, have the potential to embed transformative and sustainable change into the system:

- Should housing finance and associated services be administered by the state **independently or semi-independently** of state government as is done in numerous other states?
- What is the most appropriate **role for state government in the homeownership finance arena** given changes in federal policy and private capital markets generally?
- How can strong **policy and governance be organized** to guide housing and community service investments and outcome goals that integrate effectively across other public, private and nonprofit programs?

Throughout November, OHCS leadership will be seeking input on all of the issues and ideas surfaced. Following recommendations to Governor Kitzhaber in December, the Legislature will review and provide guidance and direction when it convenes in February 2014.

Oregon Housing and Community Services: Envisioning our Future

Characteristics of a Future State

Where are we going?

- a) Housing investments and safety net services are strategically designed for effectiveness and aligned with other state and local programs, and duplication and fragmentation are minimized.
- b) Clear outcome goals drive program structuring and investment priorities, and are supported by integrated and automated reporting tools that provide transparency and accountability.
- c) Resources available to the State are pushed as close to its customers and the local community as possible, and those communities are fully prepared to innovate and solve problems with collaboration and accountability.
- d) Low-income Oregonians know where to access help when they need it, and can readily tap in to resources and move towards economic self-sufficiency.
- e) Stronger, healthier, more stable households throughout Oregon are evident because service delivery was improved.
- f) The service delivery model helps local communities identify and address their unique priorities, concerns, challenges and capacities of both families and communities.
- g) Community housing needs are well-documented and analyzed, and accessible to decision-makers in ways that aid a clear investment strategy.
- h) Costs are matched to available resources, and where subsidization is required, it is done so with transparency and intention.
- i) Oregon has a clearly-articulated housing agenda, driven by long-term policy outcomes, and overseen by a cabinet-level body charged with addressing the conditions and causes of poverty and pursuing prosperity opportunity for all Oregonians.

Guiding Principles

What are our highest values and priorities for redesign?

- a) Improve long-term outcomes for low-income Oregonians, and serve more people overall with existing resources.
- b) Historic and institutional disparities based on race, ethnicity, history of poverty, and geography must be overcome. The State values an equitable system and will remove barriers that perpetuate disparate outcomes.
- c) The service delivery model should offer maximum funding flexibility as a means to encourage innovation and the early adoption of best practices.
- d) Housing and services investments should be aligned with other State and Federal programs and priorities, and should maximize leverage of both public and private resources.
- e) The State should not achieve cost savings by shifting responsibilities or burdens to local partners.
- f) The State must challenge its risk tolerance and strive to reduce paperwork and compliance monitoring burdens wherever possible.
- g) Decision-making, governance, and accountability systems must be streamlined and clarified.
- h) Transparency and engagement are highly valued.

PROGRAM AREA: ASSET MANAGEMENT AND COMPLIANCE

Programs Included: All OHCS Programs

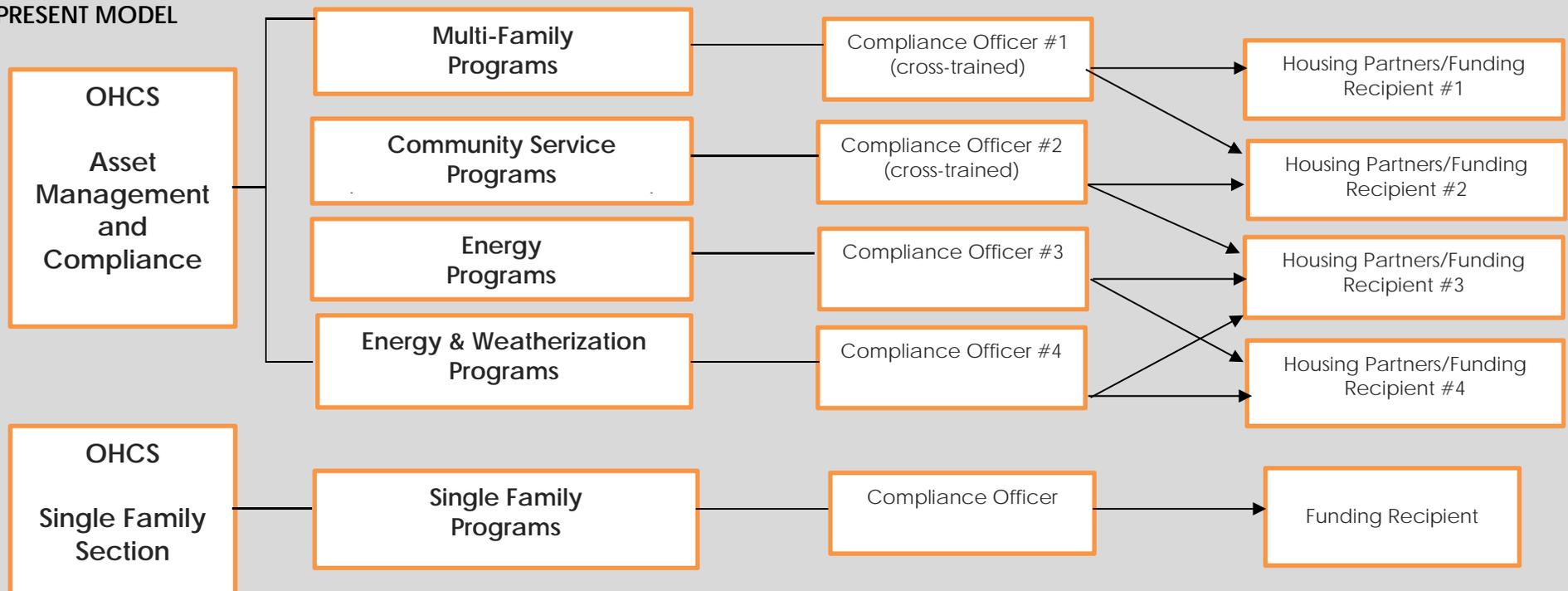
Scenario: Expand Streamlining

MODEL CHANGE OVERVIEW

PRESENT MODEL DESCRIPTION

Asset Management and Compliance monitors regulatory compliance of state and federal housing, community service, and energy and weatherization programs involving many housing developers and funding recipients. In 2009, the compliance process for housing programs began a streamlining initiative involving several housing developers and partner agencies (e.g., non-profit developers, for profit developers, and local government agencies). The streamlining effort focuses on shared monitoring and reporting responsibilities between housing developers and partner agencies to reduce the overall impact on the residents at 500+ properties around the state and reduces compliance costs. Oregon is the only state in the nation that has established a streamlining cooperative with a high success rate. The statewide initiative garnered attention from the US Department of Housing and Urban Development (HUD), resulting in OHCS participating in a pilot project involving six states and the alignment of three federal rental programs (i.e., Low-Income Tax Credit program (LIHTC), HOME Investments Partnership program, and US Department of Agriculture Rural Development program (RD)).

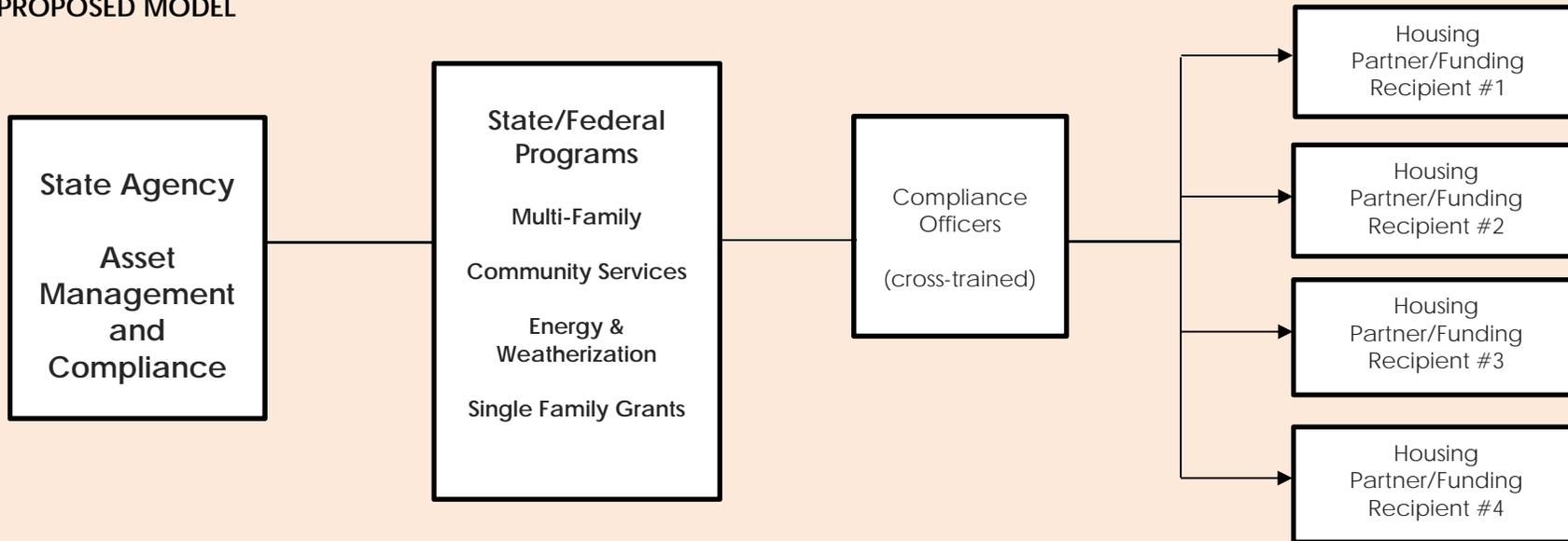
PRESENT MODEL



**PROPOSED MODEL
DESCRIPTION**

Asset Management and Compliance would expand the streamlining process to add single-family grant programs. The compliance officers would receive cross training in all programs reducing the number of compliance monitoring visits to each housing project, housing partner, and funding recipient, ultimately reducing reporting requirements.

PROPOSED MODEL



DECISION CRITERIA

LOW

HIGH

LOW	MED	HIGH	CRITERION	PROS	CONS
			Greater numbers of Oregonians can more easily achieve self-sufficiency	<ul style="list-style-type: none"> Reduce compliance costs for partners and OHCS. Provide more time for other business matters of partners (e.g., resident services and tenant meetings). 	
			Aligns with the Prosperity Initiative by reducing poverty and increasing equity.		
			Programs are financially sustainable.	<ul style="list-style-type: none"> Asset management and compliance processes are financially supported by program charges. Compliance costs reduce with number of visits and reports. 	
			Local capacity, control and decision-making are encouraged and achieve specified state policy outcomes.		
			Program decision-making processes, requirements and expected outcomes are clearly defined.		
			Governance, management, and compliance are streamlined and alignment with other state transformation efforts is improved.	<ul style="list-style-type: none"> Could collaborate with other state agencies administering housing programs to reduce duplicative efforts. 	
			Increases efficiencies and positive experience for program recipients and contractors through ease of process, coordination, flexibility and accessibility.	<ul style="list-style-type: none"> Reduces time spent by OHCS and partners on compliance monitoring. One contact for partners cross-trained in all programs. Reduces intrusion on residents. Reduces time commitments for funding recipients. 	<ul style="list-style-type: none"> Perception of inconsistency across programs. Initially requires effort and places demands on partners.
			Implementation complexities and risks are manageable and prudent.	<ul style="list-style-type: none"> Expansion of existing model used for multifamily housing programs – easily adaptable. 	

ENERGY AND WEATHERIZATION

Programs: Oregon Energy Assistance Program, Energy Conservation Helping Oregonians Program, United States Department of Energy, Low Income Housing Energy Assistance Program, Bonneville Power Administration

Scenario: State Administrators

MODEL CHANGE OVERVIEW

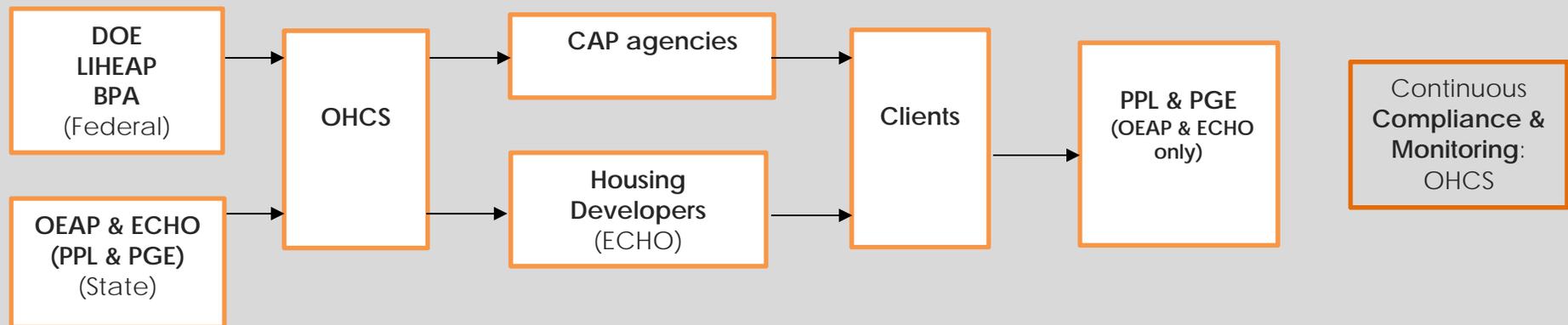
PRESENT MODEL DESCRIPTION

PGE and PPL collect the public-purpose dollars that fund Oregon Energy Assistance Program (OEAP) and Energy Conservation Helping Oregonians (ECHO). PGE and PPL forward those funds to OHCS, who sets policy, provides oversight and disperses funds. For weatherization, local delivery occurs through CAP agencies and housing developers. Energy assistance is only provided by CAP agencies. Developers and CAP agencies receive funds from OHCS and retain an administrative portion for themselves, forwarding payments to the homeowner or contractors for weatherization-related projects. For energy assistance, homeowners then pay the utilities.

USDOE, BPA and LIHEAP programs are administered by OHCS. The funds are then directed to the Community Action Agency network that then provides these services to qualifying low-income households.

For all programs, OHCS provides compliance and monitoring.

PRESENT MODEL



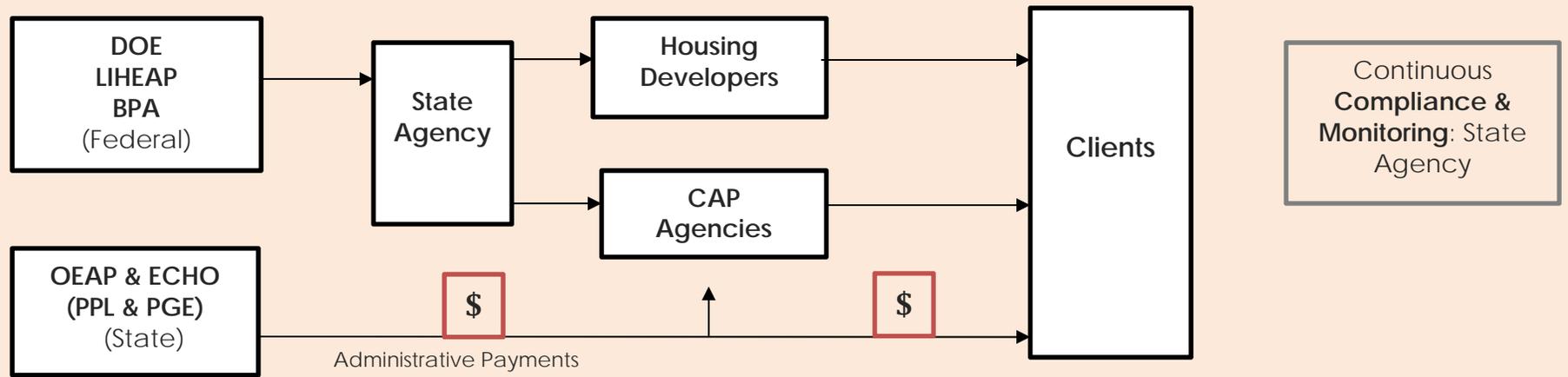
PROPOSED MODEL DESCRIPTION

PGE and PPL collect the public-purpose dollars that fund OEAP and ECHO. PGE and PPL will no longer forward those funds to OHCS. OHCS continues to administer the programs through local partners and housing developers. Utilities will provide funds to OHCS and CAP agencies to cover their administrative costs. CAP agencies would direct utilities to allocate energy assistance funds to specific customer accounts.

USDOE, BPA and LIHEAP programs continue to be administered as before.

This proposed model assumes that governance will come from an advisory body that will coordinate and drive all policy, rules and regulations together for all state(ECHO/OEAP) and federal(DOE,BPA,LIHEAP) programs.

PROPOSED MODEL



IMPLEMENTATION IMPLICATIONS AND RISKS

- How governance will be established with a new advisory body (to be determined) that will coordinate and drive all policy, rules and regulations together for all state (ECHO/OEAP) and federal (DOE, BPA, LIHEAP) programs.
- Federal funding is unpredictable. US DOE funds are decreasing.
- Requires statutory changes.
- The utilities would have increased reporting requirements from PUC.

DECISION CRITERIA

LOW

HIGH

LOW	MED	HIGH	CRITERION	PROS	CONS
			Greater numbers of Oregonians can more easily achieve self-sufficiency	<ul style="list-style-type: none"> Maintains further security of the funding source. 	
			Aligns with the Prosperity Initiative by reducing poverty and increasing equity.		
			Programs are financially sustainable.	<ul style="list-style-type: none"> Maintains further security of the funding source. Efficiency because program administration dollars move directly from utility to CAPs and housing developers without passing through OHCS Efficiency because energy assistance dollars no longer move through OHCS, CAPs and clients, but are credited by utility to eligible client accounts 	
			Local capacity, control and decision-making are encouraged and achieve specified state policy outcomes.		
			Program decision-making processes, requirements and expected outcomes are clearly defined.		
			Governance, management and compliance are streamlined and alignment with other state transformation efforts is improved.		<ul style="list-style-type: none"> The utilities would have increased reporting requirements to the PUC.
			Increases efficiencies and positive experience for program recipients and contractors through ease of process, coordination, flexibility and accessibility.	<ul style="list-style-type: none"> Homeowners no longer need to pay the utilities—those funds are directly applied to their accounts. CAPs no longer need to oversee funds for energy assistance recipients 	<ul style="list-style-type: none"> The utilities would have increased reporting requirements to the PUC.
			Implementation complexities and risks are manageable and prudent	<ul style="list-style-type: none"> Utilities have shown commitment to assure manageability 	<ul style="list-style-type: none"> The utilities would have increased reporting requirements to the PUC.

ENERGY AND WEATHERIZATION

Programs: Oregon Energy Assistance Program (OEAP), Energy Conservation Helping Oregonians Program (ECHO), United States Department of Energy(US DOE), Low Income Housing Energy Assistance Program (LIHEAP), Bonneville Power Administration (BPA)

Scenario: Utilities Administer

MODEL CHANGE OVERVIEW

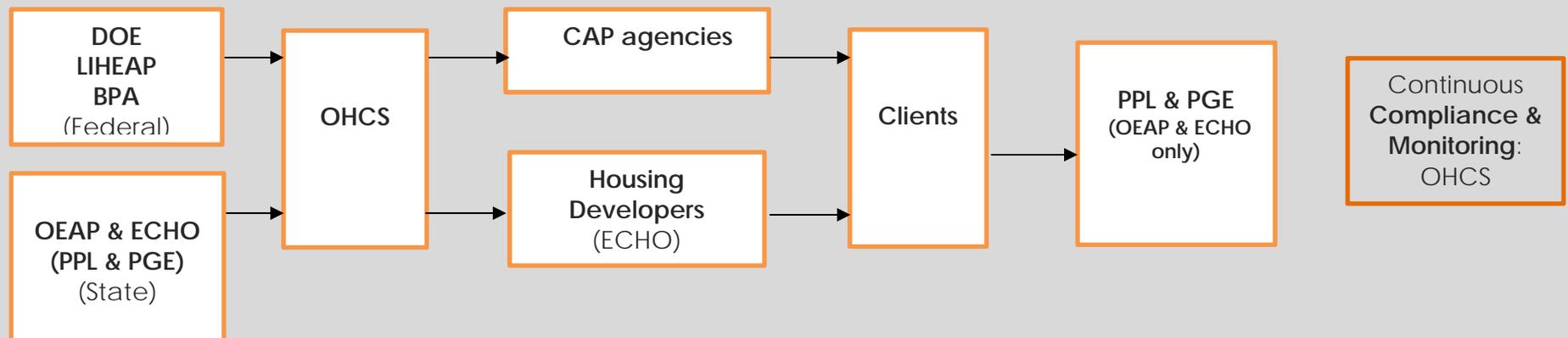
PRESENT MODEL DESCRIPTION

PGE and PPL collect the public-purpose dollars that fund Oregon Energy Assistance Program (OEAP) and Energy Conservation Helping Oregonians (ECHO). PGE and PPL forward those funds to OHCS, who sets policy, provides oversight and disperses funds. For weatherization, local delivery occurs through CAP agencies and housing developers. Energy assistance is only provided by CAP agencies. Developers and CAP agencies receive funds from OHCS and retain an administrative portion for themselves, forwarding payments to the homeowner or contractors for weatherization-related projects. For energy assistance, homeowners then pay the utilities.

USDOE, BPA and LIHEAP programs are administered by OHCS. The funds are then directed to the Community Action Agency network that then provides these services to qualifying low-income households.

For all programs, OHCS provides compliance and monitoring.

PRESENT MODEL MAP



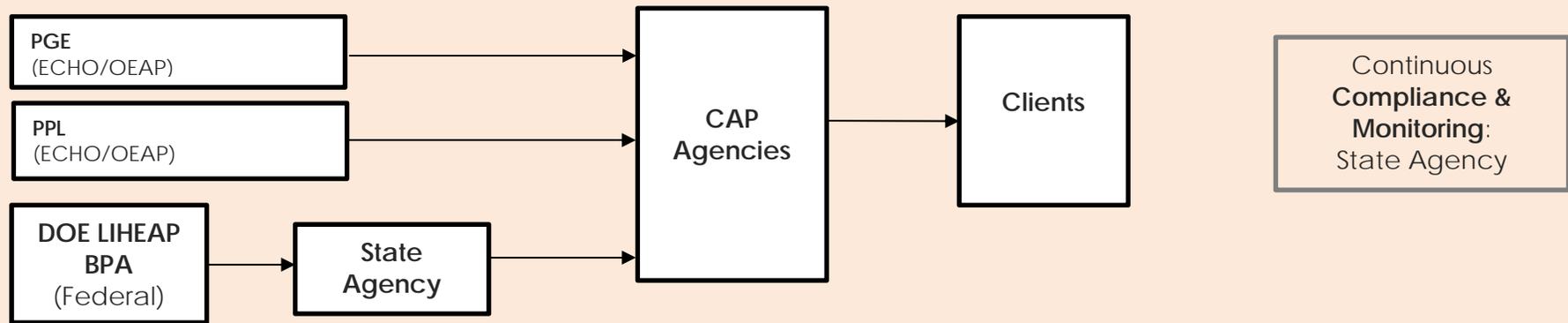
PROPOSED MODEL DESCRIPTION

Electric utility companies will serve as the administering body for the public purpose funded Oregon Energy Assistance Program (OEAP) and Energy Conservation Helping Oregonians (ECHO) programs. PGE and PPL will collect the funds and direct them to the Community Action Agency network that then provides these services to qualifying low-income households. A State entity, like OHCS, will be contracted with and continue to provide compliance and monitoring for each utility. The CAP agencies receiving ECHO and OEAP funds will report to PPL and PGE for all aspects of program delivery and administration.

US Department of Energy (USDOE), Bonneville Power Administration (BPA), and the Low-Income Home Energy Assistance Program (LIHEAP) will be collected and administered by a State entity, like OHCS. The funds are directed to the Community Action Agency network that then provides these services to qualifying low-income households. The CAP agencies receiving DOE/LIHEAP/BPA will report to the OHCS-like entity for all aspects of program delivery and administration, including monitoring and compliance.

*This proposed scenario assumes that governance be provided by an advisory body that will coordinate and drive all policy, rules and regulations together for all state (ECHO/OEAP) and federal (DOE,BPA,LIHEAP) programs. For this reason, it is not assumed that the practice will continue to set aside a portion of ECHO funds specifically for multifamily development (thus, that is no longer shown in the model below).

PROPOSED MODEL



IMPLEMENTATION IMPLICATIONS AND RISKS

- The ability to swap and reallocate dollars amongst CAP agencies is more difficult risking more Oregonians being served.
- The mechanism for governance needs to be created. This model assumes it will come from an advisory body that will coordinate and drive all policy, rules and regulations together for all state(ECHO/OEAP) and federal(DOE,BPA,LIHEAP) programs.
- Low-income multi-family development ECHO may no longer be set aside.
- Federal funding is unpredictable. US DOE funds are decreasing.
- OHCS or OHCS-like entity would need to be compensated via utility contract for monitoring and compliance or stretch its federal admin funds to monitor the OEAP and ECHO programs.
- PUC requirements for this arrangement would need to be understood and integrated into the implementation plan

DECISION CRITERIA

LOW

HIGH

LOW	MED	HIGH	CRITERION	PROS	CONS
	■		Greater numbers of Oregonians can more easily achieve self-sufficiency	<ul style="list-style-type: none"> Maintains further security of the funding source. 	<ul style="list-style-type: none"> The ability to swap and reallocate dollars amongst CAP agencies is more difficult risking more Oregonians being served Potentially higher cost of delivery to federal programs meaning less Oregonians served.
	■		Aligns with the Prosperity Initiative by reducing poverty and increasing equity.		
	■		Programs are financially sustainable.	<ul style="list-style-type: none"> Utilities may bring new technology for potentially streamlining processes Utilities may be able to administer programs more efficiently 	
■			Local capacity, control and decision-making are encouraged and achieve specified state policy outcomes.	<ul style="list-style-type: none"> Utilities may have more flexibility for innovative programmatic change and opportunities. 	<ul style="list-style-type: none"> CAA's will have to interact with more entities for their funding and implementation.
■			Program decision-making processes, requirements and expected outcomes are clearly defined.	<ul style="list-style-type: none"> Improved relationships between agencies and utilities. 	
■			Governance, management and compliance are streamlined and alignment with other state transformation efforts is improved.	<ul style="list-style-type: none"> Assuming that governance may come from an advisory body to coordinate all programs and rules. 	<ul style="list-style-type: none"> Difficult to keep programs' requirements aligned. Raises costs of delivery. Duplication may occur in governance and management.
■			Increases efficiencies and positive experience for program recipients and contractors through ease of process, coordination, flexibility and accessibility.	<ul style="list-style-type: none"> May improve relationship experience between agencies and utilities. Customers see the correlation between OEAP/ECHO dollars with utilities much better. Utility could bring new technology such as intake portal. 	<ul style="list-style-type: none"> Duplicates reporting to utilities. Adds another layer for CAA's to work with. (utilities)
	■		Implementation complexities and risks are manageable and prudent	<ul style="list-style-type: none"> Utilities have shown commitment to assure manageability 	

FOOD PROGRAMS

Programs: The Emergency Food Assistance Program(TEFAP), Commodity Supplemental Food Program(CSFP), Oregon Hunger Response Fund(OHRF)

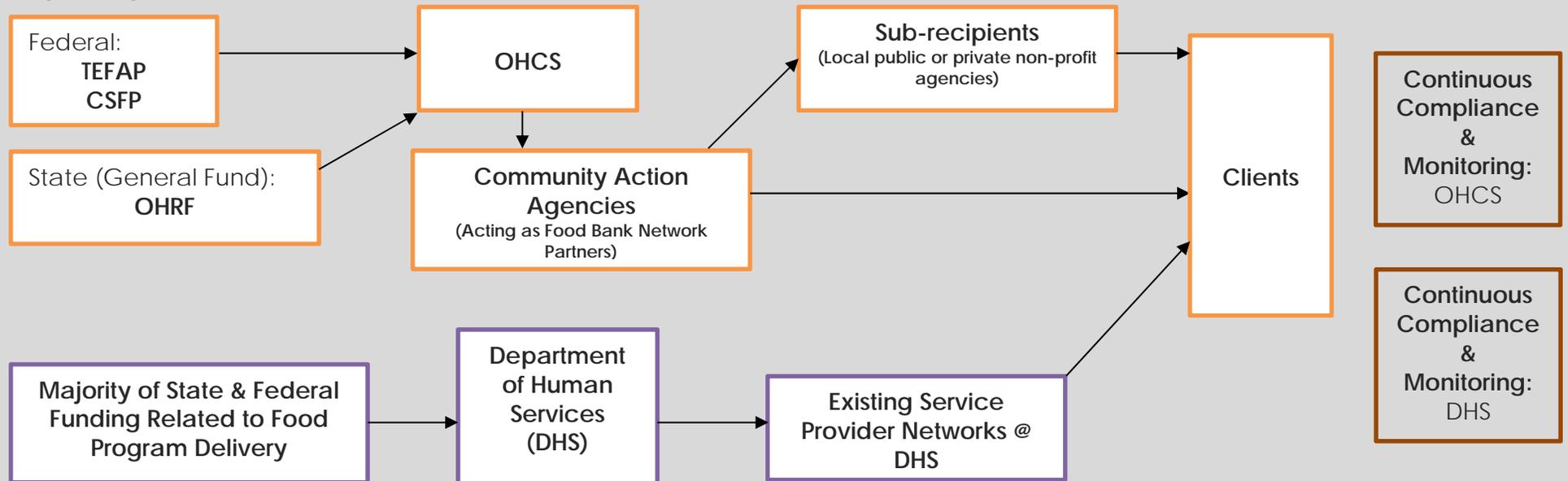
Scenario: Food Program Transfers

MODEL CHANGE OVERVIEW

PRESENT MODEL DESCRIPTION

OHCS receives federal funding for the Emergency Food Assistance Program (TEFAP) and the Commodity Supplemental Food Program (CSFP) and state funding for the Oregon Hunger Response Fund (OHRF). The nutrition and education programs are administered by OHCS and delivered through Community Action Agencies representing the Oregon Food Bank's statewide regional food bank network. The programs provide USDA food commodities through emergency food boxes and congregate meal sites (TEFAP) and free nutritious food to supplement the daily diets of children and seniors (CSFP). The OHRF funds are allocated to the food bank network partners to purchase food in bulk to repackage for household use, build network capacity to facilitate the expansion of the food supply, and link Oregonians who receive emergency food benefits to other nutrition education and supportive services.

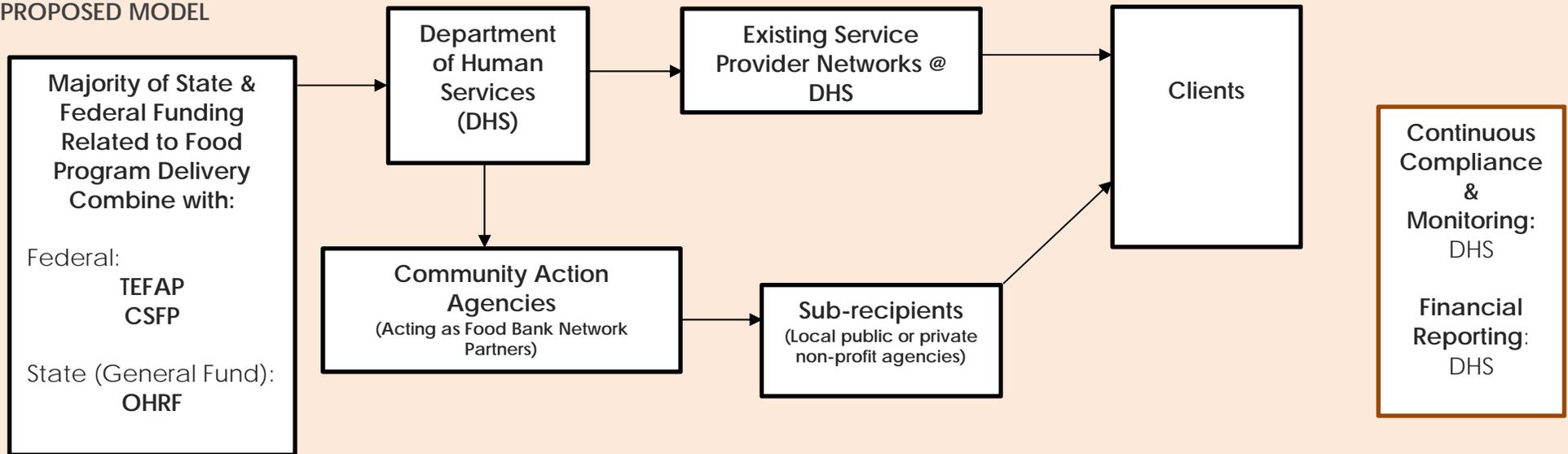
PRESENT MODEL



PROPOSED MODEL DESCRIPTION

Transfer administration of TEFAP, CSFP, and OHRF to the Department of Human Services (DHS) for consolidation and streamlining with similar programs. DHS currently administers a variety of programs that help similar populations (e.g., Supplemental Nutrition Assistance Program (SNAP), Meals on Wheels, congregate meal sites). Greater synergies between similarly focused programs produces better results and increased numbers of Oregonians served.

PROPOSED MODEL



IMPLEMENTATION IMPLICATIONS AND RISKS

- More research is needed to ensure that combining programs results in increased efficiencies and financial sustainability
- Processes could become more complicated if transition not managed well

DECISION CRITERIA

LOW



HIGH

LOW	MED	HIGH	CRITERION	PROS	CONS
			Greater numbers of Oregonians can more easily achieve self-sufficiency	<ul style="list-style-type: none"> Streamlined process results in more Oregonians served Increased interaction with populations served by programs 	
			Aligns with the Prosperity Initiative by reducing poverty and increasing equity.	<ul style="list-style-type: none"> Increased numbers served results in reduction in overall hunger of the target population Increased options through existing service provider network particularly for the senior population served 	
			Programs are financially sustainable.		<ul style="list-style-type: none"> Administrative costs are currently subsidized by related programs because the programs as currently administered do not pay program costs
			Local capacity, control and decision-making are encouraged and achieve specified state policy outcomes.	<ul style="list-style-type: none"> Local capacity increased when similarly focused programs are combined 	
			Program decision-making processes, requirements and expected outcomes are clearly defined.		<ul style="list-style-type: none"> Processes could become more complicated if transition not managed well
			Governance, management and compliance are streamlined and alignment with other state transformation efforts is improved.	<ul style="list-style-type: none"> Aligning food programs administered by more than one state agency achieves greater efficiency 	
			Increases efficiencies and positive experience for program recipients and contractors through ease of process, coordination, flexibility and accessibility.	<ul style="list-style-type: none"> Coordinating all related programs from one agency increases accessibility Using existing DHS service provider network makes access easier particularly for seniors 	
			Implementation complexities and risks are manageable and prudent		

FOOD PROGRAMS

Food Distribution Program On Indian Reservations (FDPIR)

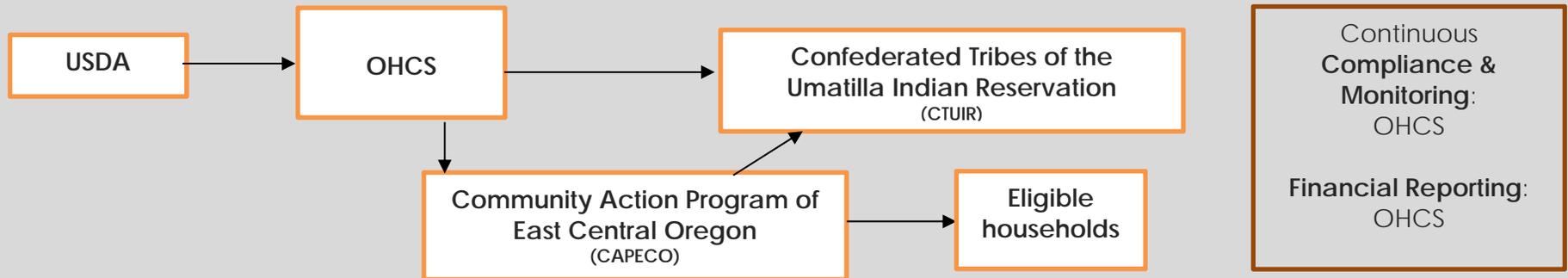
Scenario: FDPIR Transfer

MODEL CHANGE OVERVIEW

PRESENT MODEL DESCRIPTION

US Department of Agriculture (USDA) provides commodity foods to low-income Native American and non-Native American households on or near the Umatilla Indian Reservation. The program is administered by OHCS and the Confederated Tribes of the Umatilla Indian Reservation (CTUIR) contract with the Community Action Program of East Central Oregon (CAPECO) as the regional food bank network partner to provide the commodity foods to eligible households.

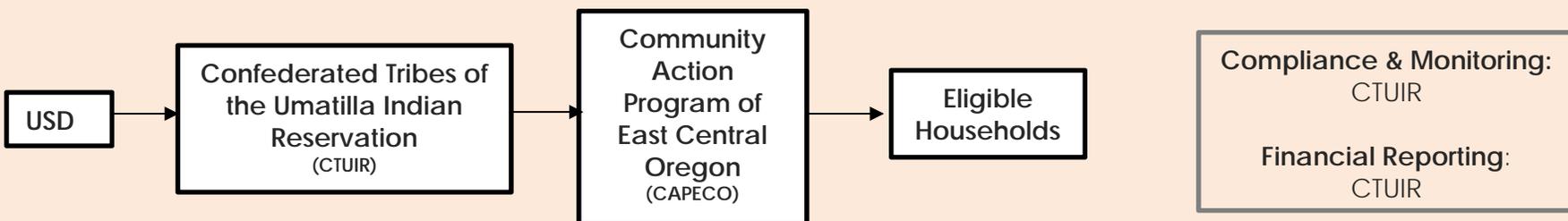
PRESENT MODEL



PROPOSED MODEL DESCRIPTION

Transfer the administration of the FDPIR program to the CTUIR. The CTUIR is the only federally recognized tribe in the state that does not administer the FDPIR program directly. The USDA is open to working with the CTUIR to deliver the food commodities directly to eligible households through the existing contract with CAPECO. This model increases local capacity by placing the administration of the program at the lowest possible level.

PROPOSED MODEL



IMPLEMENTATION IMPLICATIONS AND RISKS

- Would need to work with CTUIR, CAPECO and others to fully understand impact of change
- Need to ensure leverage of federal dollars continues in the proposed model change
- OHCS would possibly need to provide administrative support to the CTUIR during the transition to ensure success

DECISION CRITERIA

LOW



HIGH

LOW	MED	HIGH	CRITERION	PROS	CONS
		■	Greater numbers of Oregonians can more easily achieve self-sufficiency	<ul style="list-style-type: none"> • Streamlined process results in more Oregonians served • Greater numbers served due to increased community trust in delivery by CTUIR directly 	
		■	Aligns with the Prosperity Initiative by reducing poverty and increasing equity.	<ul style="list-style-type: none"> • Increased numbers served results in reduction in overall hunger of the target population 	
	■		Programs are financially sustainable.		
		■	Local capacity, control and decision-making are encouraged and achieve specified state policy outcomes.	<ul style="list-style-type: none"> • Local decision-making will result in more culturally-specific dietary choices for target population 	
	■		Program decision-making processes, requirements and expected outcomes are clearly defined.		<ul style="list-style-type: none"> • New role for CTUIR may require administrative support during transition
		■	Governance, management and compliance are streamlined and alignment with other state transformation efforts is improved.	<ul style="list-style-type: none"> • Governance and management of the program is streamlined as the state is removed as intermediary 	



Increases efficiencies and positive experience for program recipients and contractors through ease of process, coordination, flexibility and accessibility.

- Efficiencies realized by streamlining the process
- Potential for positive experience because of trust in CTUIR by population served



Implementation complexities and risks are manageable and prudent

- Implementation risks because of the different roles by USDA and CTUIR

PREVENTING AND ENDING HOMELESSNESS

Programs: Community Services Block Grant (CSBG), Emergency Solutions Grant (ESG), Emergency Housing Assistance (EHA), HOME Tenant Based Assistance (HOMETBA), Low Income Rental Housing Fund (LIRHF), State Homeless Assistance Program (SHAP), Housing Stabilization Program (HSP)

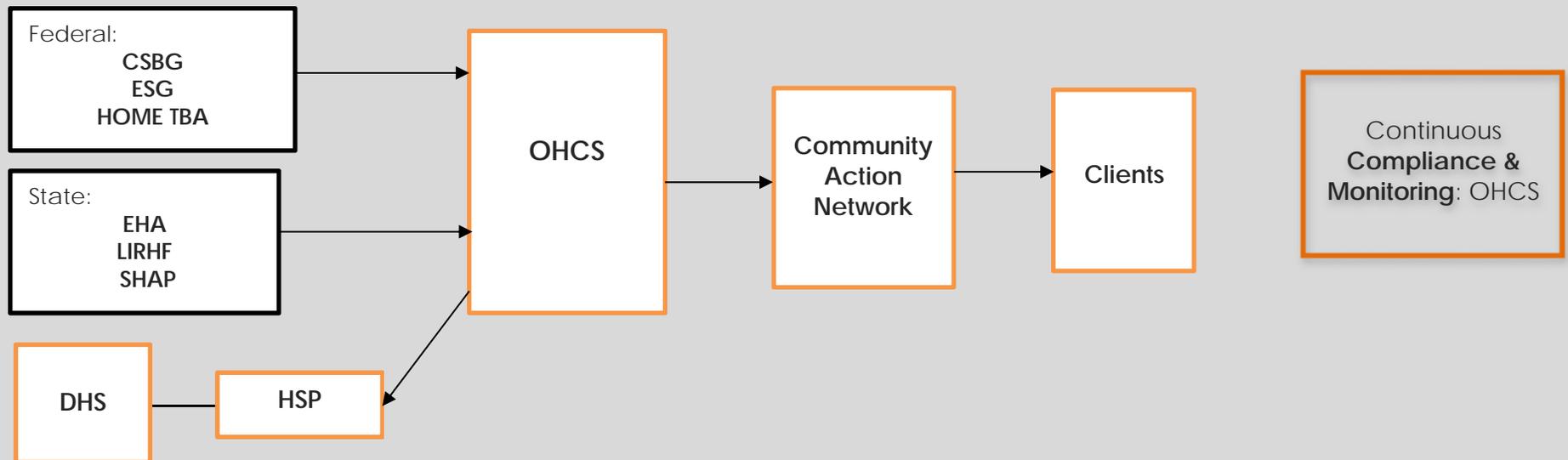
Scenario: Expanding Flexibility & Accessibility

MODEL CHANGE OVERVIEW

PRESENT MODEL DESCRIPTION

OHCS administers seven active programs in this Community Services area, which include three with federal funding—Community Services Block Grant (CSBG), Emergency Solutions Grant (ESG), HOME Tenant Based Assistance (HOME TBA)—and four with state funding—Emergency Housing Assistance (EHA), Housing Stabilization Program (HSP), Low Income Rental Housing Fund (LIRHF) and State Homeless Assistance Program (SHAP). Each program has its own eligibility, reporting and compliance requirements.

PRESENT MODEL

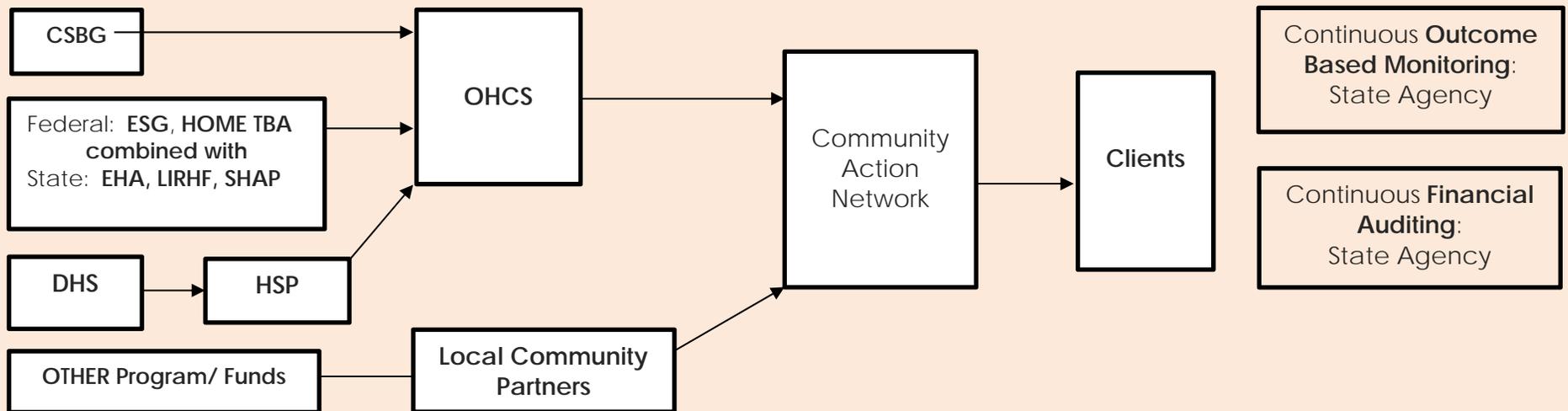


PROPOSED MODEL DESCRIPTION

The proposed model incorporates short-term and longer-term changes. In the short-term, six programs are combined (all but CSBG), where possible, to have common eligibility, reporting and compliance requirements. This change will involve federal waivers and state statute and/or rules modifications.

The model also envisions a future that allows for greater flexibility and accessibility of other (non-OHCS) funds including: Continuum of Care, United Way, Local Fund Raisers, Local Governments, and Local Faith Based organizations. Coordinating with the various local partners will respect the local infrastructures and give clients choice over which partner they want to work with. In order to realize this vision, an integrated database is necessary to allow information about programs to be more accessible across providers (both state agencies and the local delivery partners) and to establish outcome-based metrics. These outcome-based metrics will allow for greater accountability of the partners given the desire for greater flexibility in program elements to meet the unique needs of clients served.

PROPOSED MODEL



IMPLEMENTATION IMPLICATIONS AND RISKS

- Federal waivers required for ESG, HOME TBA and state statute/rule change necessary for other programs.
- The State will continue oversight and monitoring, leaving service delivery to community partners.
- This model may, or may not, work with other transformational efforts, depending on the staff and the charge they are given.
- Clear vision and direction will need to be established for OHCS staff.
- Access to additional funds for implementing the database that is envisioned for this model.

DECISION CRITERIA

LOW



HIGH

LOW	MED	HIGH	CRITERION	PROS	CONS
			Greater numbers of Oregonians can more easily to achieve self-sufficiency.	<ul style="list-style-type: none"> Community services, homeless programs, energy assistance and weatherization, could remain under the director of one State agency/division. If coordinated with other state programs through a prosperity plan and prioritized by the Governor could lead to greater numbers of people achieving self-sufficiency. 	<ul style="list-style-type: none"> State departments/divisions are inherently less flexible, with more layers and less local autonomy If not coordinated with other anti-poverty programs in state government would not make a significant improvement in the numbers of Oregonians helped.
			Aligns with the Prosperity Initiative by reducing poverty and increasing equity.	<ul style="list-style-type: none"> The current system of program management, reporting and auditing of community service/homeless programs could be modified to be smaller and less cumbersome. The State would provide some neutrality in distribution of resources around the entire state. CAPs would experience little disruption in service delivery. Community Services could be connected more directly to the Governor's office and may provide leverage for the Prosperity Initiative. 	<ul style="list-style-type: none"> This would not facilitate local control and initiative as suggested by the Guiding Principles. The opportunity to develop outcomes based on community input and best practices may be lost.
			Programs are financially sustainable for the State over the long term.	<ul style="list-style-type: none"> Efficiencies in administration for state with only two programs versus seven Efficiencies in compliance monitoring for state If the State is willing to work with the local service delivery system to create flexibility in funding and coordinate services with other State run anti-poverty programs, etc. Maintaining the existing model while the long-term vision is implemented is more fiscally responsible than making a short-term change. 	<ul style="list-style-type: none"> Fewer dollars to fund long term projects that support this model.

	Local capacity and decision-making are encouraged to achieve specified high-level state policy outcomes.	<ul style="list-style-type: none"> • Greater control over selected outputs or programs and services in all regions of Oregon. • Once outcome-based metrics are in place, OHCS staff time (dollars) can be reduced from prescriptive funder compliance. 	<ul style="list-style-type: none"> • Inability to be nimble to address quickly changing community needs • Top down structure does not lend itself to local decision making for needs and resources.
	Program decision-making processes, requirements and expected outcomes are clearly defined.	<ul style="list-style-type: none"> • The present model of shared decision making will be sustained. • Communities know what is needed to move the needle. Outcome-based metrics pave the way for greater local direction. 	
	Governance, management and compliance are streamlined and serve to further the alignment with other state transformation efforts.	<ul style="list-style-type: none"> • Carries out streamlining • Current state transformational efforts are focused on partnerships created at the community level. 	
	Increases efficiencies and positive experience for program recipients and contractors through ease of process, coordination, flexibility and accessibility.	<ul style="list-style-type: none"> • Reduces administrative costs for CAA's • OHCS should partner with the service delivery system to develop meaningful outcomes and streamline service delivery. • Delivers on the promise of the original OHCS mission and vision. • Will leave current informal community partnerships in place. 	
	Implementation complexities and risks are manageable and prudent	<ul style="list-style-type: none"> • Direct "command and control" will make implementation manageable. • Less disruption during the transition to a smaller division for Community Services. • Centralizing data systems is consistent with at least four characteristics of a Future State and five of the Guiding Principles. 	<ul style="list-style-type: none"> • Implementation of cross-organizational data base is complex.

HOUSING COUNSELING - SINGLE FAMILY

Programs: Homeownership Assistance Program (HOAP), Foreclosure Avoidance Mediation Program (FAMP), National Foreclosure Mitigation Counseling (NFMC)

Scenario: State Administrators

MODEL CHANGE OVERVIEW

PRESENT MODEL DESCRIPTION

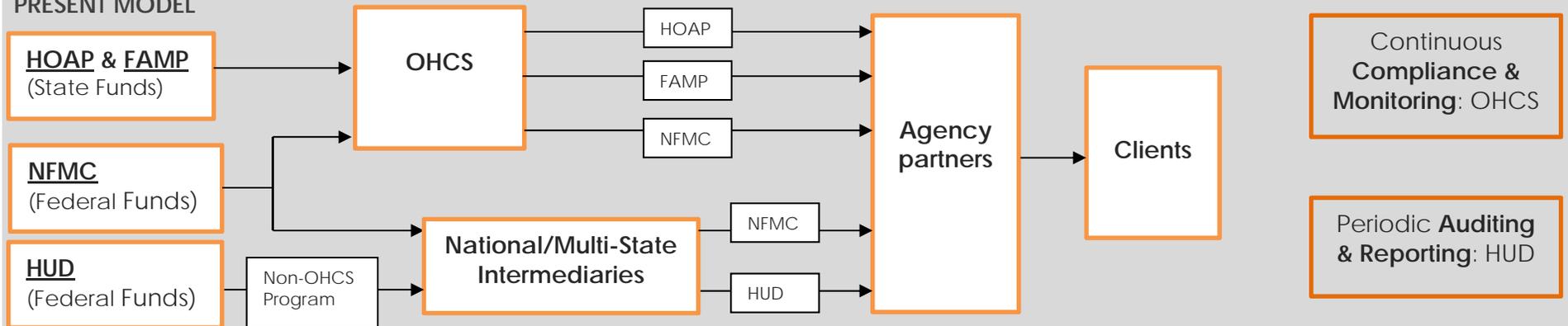
OHCS currently allocates six separate funding sources to agency partners (4 from HOAP, 1 from FAMP, and 1 NFMC). These funds are used to support homebuyer education, and foreclosure mitigation counseling, in an effort to increase the rate of homeownership. Funds also include down payment assistance for first time homebuyers. Program delivery is accomplished through a competitive process resulting in funding awards to agency partners.

Agency partners include regional housing centers, community action agencies, community development corporations, and homeownership missioned non-profits.

Some of the Agency partners also receive funding through a national or multi-state HUD Intermediary and receive additional NFMC dollars and other HUD funding that is complementary to the state's sources of funding.

Both OHCS and the national or multi-state intermediaries provide multiple grants to the same agency partners. Multiple grants must be monitored at both the state agency and agency partner level.

PRESENT MODEL



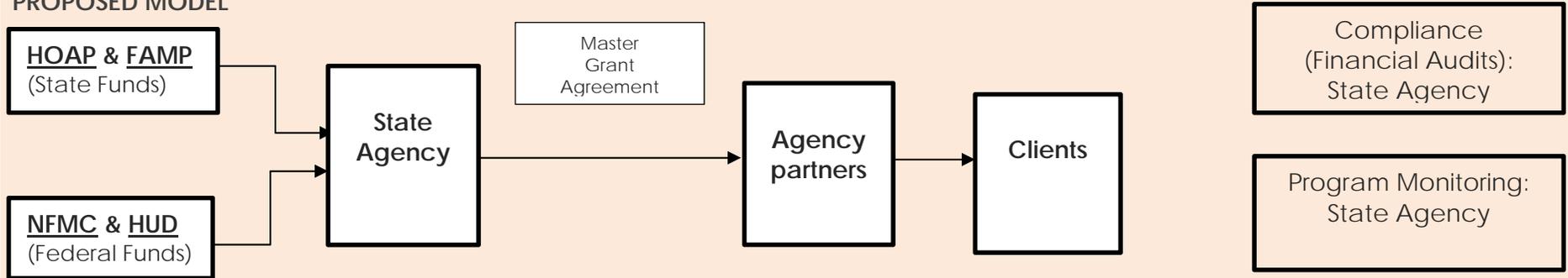
PROPOSED MODEL DESCRIPTION

A State agency will administer single family housing finance programs. The administering State agency would continue to allocate resources to and perform compliance monitoring of current programs, as well as, expand to become a HUD Intermediary. The expansion would allow the state to obtain additional federal resources and allocate all funds through a grant agreement to Agency partners.

State and federal funding streams would be awarded through a single master grant agreement (MGA) process. Awarding funding through an MGA would make administration, including compliance and monitoring, of all the programs more efficient for the State agency and the Agency partners.

The State agency would work with agency partners to develop programs and provide technical assistance. The Scenario Build Team identified potential opportunities to improve the local network of service delivery and recommended a discussion with a larger and more diverse group of agency partners.

PROPOSED MODEL



IMPLEMENTATION IMPLICATIONS AND RISKS

- Assumes the state agency would become the HUD intermediary which may not provide sufficient administrative funding to cover costs of allocating additional HUD funds.
- Governance structure needs to be established to provide guidance with respect to policy and desired program outcomes.
- Collaboration between the state agency and agency partners in the development of programs, including technical assistance is essential. Risk that funding and program decisions are disconnected from the expertise of the service delivery partners.
- Recommendations to the governing body with respect to funding allocations and program outcomes should include the input from the agency partners.

DECISION CRITERIA

LOW



HIGH

LOW	MED	HIGH	CRITERION	PROS	CONS
	■		Greater numbers of Oregonians can more easily achieve self-sufficiency	<ul style="list-style-type: none"> Streamlined funding allocation, reporting, and compliance monitoring would allow pass through of more resources to clients. 	<ul style="list-style-type: none"> This model could transfer administrative cost to agency partners if governance is not established appropriately.
■			Aligns with the Prosperity Initiative by reducing poverty and increasing equity.		
	■		Programs are financially sustainable.	<ul style="list-style-type: none"> State Agency may have lower indirect costs, compared to the current OHCS model, due to programmatic changes. Streamlined administration for both State agency and agency partners. 	<ul style="list-style-type: none"> Depending on the structure of the State agency, it may not have the ability to attract non-Federal or non-State funding which may be necessary in light of diminished funding. Shortfall of HUD Intermediary administrative funding would be the responsibility of the State agency.
■			Local capacity, control and decision-making are encouraged and achieve specified state policy outcomes.	<ul style="list-style-type: none"> Clear policy direction and expected programmatic outcomes, with the involvement of agency partners, allow flexibility in the local delivery model. 	
	■		Program decision-making processes, requirements and expected outcomes are clearly defined.	<ul style="list-style-type: none"> Assumes a governance structure that provides guidance with respect to policy and desired program outcomes. 	<ul style="list-style-type: none"> The State agency would need to be competent in complex program development and implementation and able to provide technical assistance that staff may not have the expertise to do.
	■		Governance, management and compliance are streamlined and alignment with other state transformation efforts is improved.	<ul style="list-style-type: none"> Consolidated and streamlined program administration, including the acceptance of HUD and NFMC audits and reports. 	
	■		Increases efficiencies and positive experience for program recipients and contractors through ease of process, coordination, flexibility and accessibility.	<ul style="list-style-type: none"> Streamlined allocation of funds and compliance monitoring less burdensome for the State agency and agency partners. Clear policy direction and expected programmatic outcomes allow flexibility in the local delivery model. 	<ul style="list-style-type: none"> New role of State agency as a HUD Intermediary in allocating, reporting and monitoring new HUD programs. Need to ensure appropriate delivery of technical assistance, reporting and compliance monitoring.
	■		Implementation complexities and risks are manageable and prudent	<ul style="list-style-type: none"> Minimal upfront investment of resources would be needed to implement the proposed model. 	<ul style="list-style-type: none"> Implementation and timeline to develop the State agency and establish a HUD Intermediary are unknown at this time.

HOUSING COUNSELING - SINGLE FAMILY

Programs: Homeownership Assistance Program (HOAP), Foreclosure Avoidance Mediation Program (FAMP), National Foreclosure Mitigation Counseling (NFMC)

Scenario: Oregon Collaborative Intermediary Administrators

MODEL CHANGE OVERVIEW

PRESENT MODEL DESCRIPTION

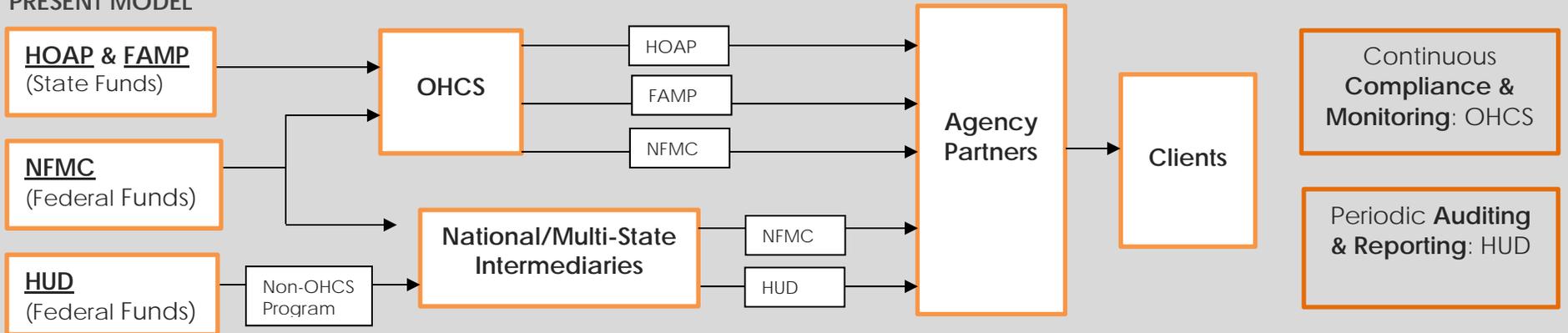
OHCS currently allocates six separate funding sources to Agency Partners (4 from HOAP, 1 from FAMP, and 1 NFMC). These funds are used to support homebuyer education and foreclosure mitigation counseling in an effort to increase the rate of homeownership. Funds also include downpayment assistance for first time homebuyers. Program delivery is accomplished through a competitive process making awards to Agency Partners.

Agency Partners include regional housing centers, community action agencies, community development corporations, and homeownership missioned non-profits.

Some of the Agency Partners also receive funding through a national or multi-state HUD Intermediary and receive additional NFMC dollars and other HUD funding that is complementary to the state's sources of funding.

Both OHCS and the national or multi-state intermediaries provide multiple grants to the same Agency Partners. Multiple grants must be monitored at both the state and Agency Partner level.

PRESENT MODEL



PROPOSED MODEL DESCRIPTION

State agency has a diminished role that would: contract with a new Oregon Collaborative Intermediary (Intermediary) to allocate funding, provide appropriate reporting, and monitor agency partners for program compliance; become a pass through of state funding; be responsible for monitoring programmatic outcomes and review the annual financial audit of the Intermediary; and the governing body would set policy and determine programmatic outcomes.

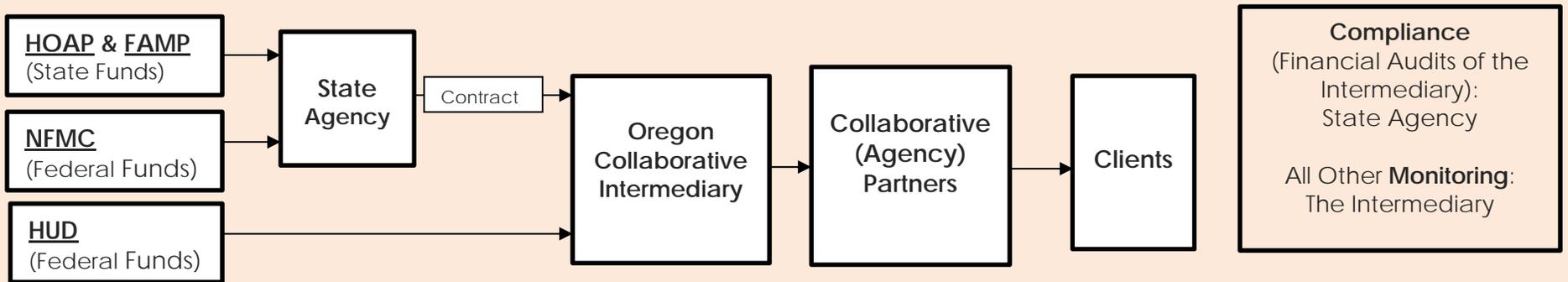
The Intermediary would: become a HUD Intermediary, which would allow them to obtain additional federal resources; award state and federal funding streams through a single master grant agreement (MGA) process aligned with state policy direction and desired outcomes; report regularly to the State agency; pursue Foundation grants and other sources of funding; and provide deeper technical assistance and training from collaborative partners to the local network.

Awarding funding through an MGA would consolidate the administrative burden for the State agency and agency partners, as compared to the current model.

Agency partners would be members of the Intermediary and have a more active role in program development and funding awards.

This model alleviates the State agency from applying for NFMC funding as the Intermediary would obtain these funds directly.

PROPOSED MODEL



IMPLEMENTATION IMPLICATIONS AND RISKS

- Assumes the Intermediary would become the HUD Intermediary which may not provide sufficient administrative funding to cover costs of allocating additional HUD funds.
- Requires selection or creation of a new statewide Oregon Collaborative Intermediary able to implement proposed model. Time to establish, scope of work, and start-up and on-going costs to operate unknown at this time.
- Risk of inefficiency with an added layer of administration (State HFA and Intermediary); this only works to the extent that the State HFA role can be structured very minimally.
- Potential for homeownership programs to remain isolated from other housing and community services programs, rather than a seamless continuum.
- Program authority and administration largely vested in a non-governmental entity.

DECISION CRITERIA

LOW



HIGH

LOW	MED	HIGH	CRITERION	PROS	CONS
	■		Greater numbers of Oregonians can more easily achieve self-sufficiency	<ul style="list-style-type: none"> Streamlined funding allocation, reporting, and compliance monitoring would allow pass through of more resources to clients. Greater access to foundations/grants on behalf of the agency partners could provide additional funding or hold clients harmless if federal and state funding diminishes. 	<ul style="list-style-type: none"> Implementation timeline of an Intermediary is uncertain.
■			Aligns with the Prosperity Initiative by reducing poverty and increasing equity.		
	■		Programs are financially sustainable.	<ul style="list-style-type: none"> Shortfall of HUD Intermediary administrative funding would be the responsibility of the Intermediary, not the State agency. 	<ul style="list-style-type: none"> Cost of start-up and on-going operations is unknown.
	■		Local capacity, control and decision-making are encouraged and achieve specified state policy outcomes.	<ul style="list-style-type: none"> Collaboration with local partners is central to program administration. This is particularly relevant in the areas of technical assistance and training. Clear policy direction and expected programmatic outcomes set by State agency allows flexibility in the local delivery model. 	
	■		Program decision-making processes, requirements and expected outcomes are clearly defined.	<ul style="list-style-type: none"> Agency partners directly participate in decision-making, related to program development and funding awards. Assumes a State agency governance structure that provides guidance with respect to policy and desired program outcomes. 	
	■		Governance, management and compliance are streamlined and alignment with other state transformation efforts is improved.	<ul style="list-style-type: none"> Consolidated and streamlined program administration, including the acceptance of HUD and NFMC audits and reports. 	



Increases efficiencies and positive experience for program recipients and contractors through ease of process, coordination, flexibility and accessibility.

- Streamlined allocation of funds and compliance monitoring less burdensome for the State agency and agency partners.
- Clear policy direction and expected programmatic outcomes allow flexibility in the local delivery model.
- Ability of Intermediary to take an advocacy role and coordinate with national and state policy partners to seek system improvements/changes.

- Creating an Intermediary may add a layer of administration and therefore be less inefficient.



Implementation complexities and risks are manageable and prudent

- Requires selection or creation of a new entity, upfront investment of resources needed to implement the proposed model unknown.

MULTIFAMILY- REAL ESTATE FINANCE

Programs: Housing Development Grant Program (HDGP), Oregon Rural Rehabilitation Loan Program (ORR), General Housing Account Program (GHAP), Pre-development Loan Program and Help Program

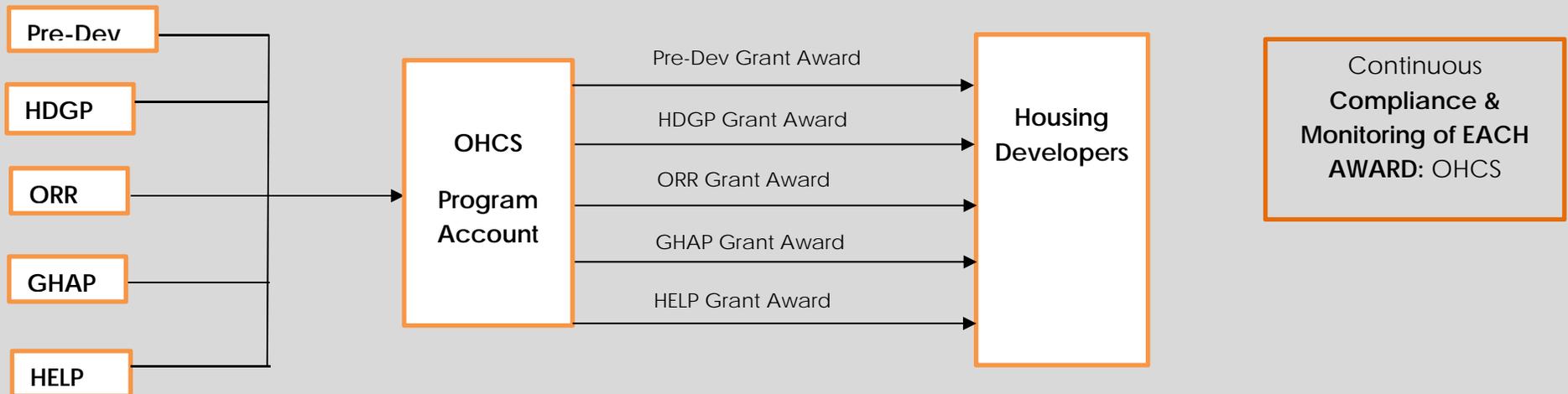
Scenario: Combine Programs and Funding Sources

MODEL CHANGE OVERVIEW

PRESENT MODEL DESCRIPTION

Oregon Housing and Community Services (OHCS) currently administers five separate programs out of five separate accounts to provide gap and pre-development funding to assist in the building of affordable multifamily housing. There are administrative costs associated with: managing each of the accounts; awarding multiple grants to housing developers for individual projects; and monitoring multiple programs with different eligibility requirements.

PRESENT MODEL (All State Funds)



PROPOSED MODEL DESCRIPTION

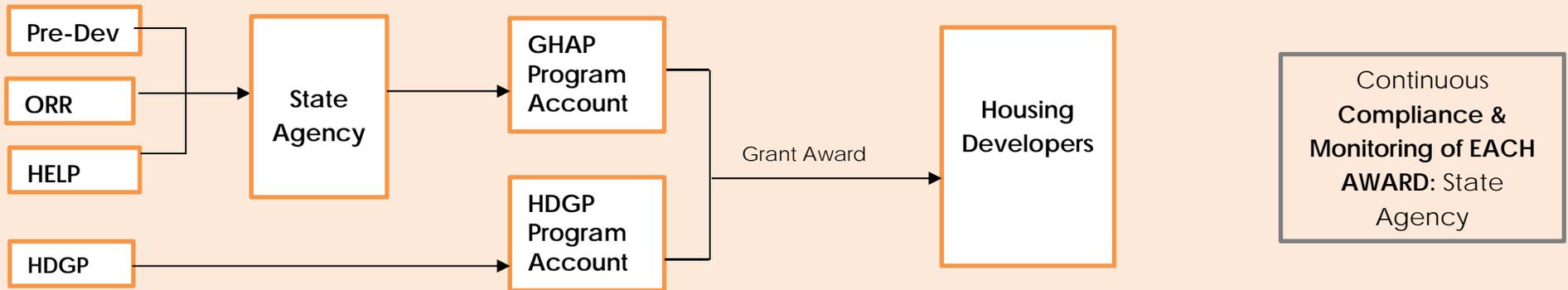
Combine four funding sources within the Housing Development portion of the Multi-family GHAP account. Align the eligibility requirements of the remaining two accounts (GHAP and HDGP) to the most flexible requirements. This allows OHCS to create a single financing program. Grantees would apply for funding from one program.

Efficiencies gained include reduced processing of grants or loans to multi-family housing developments; ease of tracking, reporting and monitoring for OHCS and housing developers.

General Housing Account Program (GHAP) and Housing Development Grant Program (HDGP) accounts remain separate based on reporting requirements and due to funding type (Document Recording Fee and Public Purpose Charge).

Assumes a governance structure where policy is periodically reviewed and updated to prioritize use of limited funds to focus resources for the greatest outcomes to take advantage of market trends.

PROPOSED MODEL



IMPLEMENTATION IMPLICATIONS AND RISKS

- Align GHAP and HDGP eligibility requirements to be the most flexible through statutory or administrative rule change. Set aside requirements will need to be taken into consideration.

DECISION CRITERIA

LOW

HIGH

LOW	MED	HIGH	CRITERION	PROS	CONS
			Greater numbers of Oregonians can more easily achieve self-sufficiency		
			Aligns with the Prosperity Initiative by reducing poverty and increasing equity.		
			Programs are financially sustainable.	<ul style="list-style-type: none"> • Efficiencies in administration for state with only two programs versus five • Efficiencies in compliance monitoring for state 	
			Local capacity, control and decision-making are encouraged and achieve specified state policy outcomes.		
			Program decision-making processes, requirements and expected outcomes are clearly defined.	<ul style="list-style-type: none"> • Eliminates program inconsistencies 	
			Governance, management and compliance are streamlined and alignment with other state transformation efforts is improved.	<ul style="list-style-type: none"> • Carries out streamlining • Opportunity for new governance model to align with other state transformation efforts. 	
			Increases efficiencies and positive experience for program recipients and contractors through ease of process, coordination, flexibility and accessibility.	<ul style="list-style-type: none"> • Reduces administrative costs for housing developers • Efficiencies in compliance monitoring for housing developers 	
			Implementation complexities and risks are manageable and prudent		

MULTIFAMILY- REAL ESTATE FINANCE

Programs: Vertical Housing Tax Credit (VHTC)

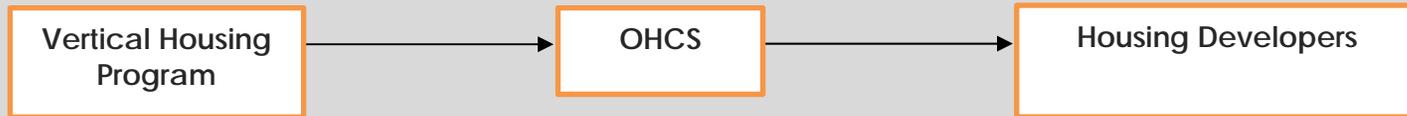
Scenario: VHTC Transfers to Department of Revenue

MODEL CHANGE OVERVIEW

PRESENT MODEL DESCRIPTION

The program is for mixed-use commercial/residential developments in areas designated by communities through a partial property tax exemption, not a state or federal tax credit like other programs administered by Oregon Housing and Community Services (OHCS). Applications submitted by housing developers for vertical housing tax credits are reviewed and approved by OHCS.

PRESENT MODEL



PROPOSED MODEL DESCRIPTION

Transfer administration of the Vertical Housing Tax Credit Program from OHCS to Department of Revenue. Vertical Housing is the only state property tax exemption program administered outside the Department of Revenue, and is not similar to other affordable housing programs offered through OHCS which include tax credits, loans and grant subsidy programs.

Program would be administered by Department of Revenue with best expertise on property tax exemption programs including interpretation of applicable statutes.

PROPOSED MODEL



IMPLEMENTATION IMPLICATIONS AND RISKS

- Counsel on affordable housing aspects of this program may need to be provided to the Department of Revenue by OHCS.

DECISION CRITERIA

LOW



HIGH

LOW	MED	HIGH	CRITERION	PROS	CONS
			Greater numbers of Oregonians can more easily achieve self-sufficiency		
			Aligns with the Prosperity Initiative by reducing poverty and increasing equity.		
			Programs are financially sustainable.	<ul style="list-style-type: none"> Infrastructure in place at Department of Revenue. Application charge can be adjusted to cover cost of program delivery. 	
			Local capacity, control and decision-making are encouraged and achieve specified state policy outcomes.		
			Program decision-making processes, requirements and expected outcomes are clearly defined.	<ul style="list-style-type: none"> Expertise for property tax exemption programs is housed within the Department of Revenue and local county tax/assessor offices. 	
			Governance, management and compliance are streamlined and alignment with other state transformation efforts is improved.	<ul style="list-style-type: none"> Aligns property tax exemption program with all other similar programs at Department of Revenue. 	
			Increases efficiencies and positive experience for program recipients and contractors through ease of process, coordination, flexibility and accessibility.	<ul style="list-style-type: none"> Department of Revenue better equipped to answer questions on property tax exemption rules and processes. 	
			Implementation complexities and risks are manageable and prudent	<ul style="list-style-type: none"> Department of Revenue has the infrastructure to administer property tax exemption programs. OHCS will continue to assist as appropriate. 	