Department of Land Conservation and Development

2021-23 TECHNICAL ASSISTANCE GRANT APPLICATION - REVISED

Please complete each section in the form below. Type or write requested information in the spaces provided. **Submit completed applications by October 1, 2021**.

Date of Application: October 1, 2021, Revised November 12, 2021

Applicant: City of Newberg

(If council of governments, please also include the recipient jurisdiction name if applicable)

Street Address: 414 E First Street

City: Newberg 2ip: 97132

Contact name and title: Mary Heberling-Creighton, Housing Planner

Contact e-mail address: mary.heberlingcreighton@newbergoregon.gov

Contact phone number: 503-537-1240

Grant request amount (in whole dollars): \$50,000

Local Contribution (recommended but not required): \$10,000

Project Title:

City of Newberg Clear and Objective Audit for Compliance with Needed Housing

Project summary: (Summarize the project and products in 50 words or fewer)

The primary objective of this Project is to prepare an audit and updates to the Comprehensive Plan and Development Code for compliance with Needed Housing. The audit will focus on clear and objective standards for multifamily housing (5+ units) with recommended code amendments for the Comprehensive Plan and Development Code.

Project Description & Work Program

Please describe the proposed project, addressing each of the following in an attachment.

- **A. Goals and Objectives.** State the goals or overall purpose of the project. Describe particular objective(s) the community hopes to accomplish. Please indicate whether this is a stand-alone project or is part of a longer multi-year program. If it is the latter, describe any previous work completed, subsequent phases and expected results, and how work beyond this project will be funded.
- **B. Products and Outcomes.** Clearly describe the product(s) and outcome(s) expected from the proposed project. Briefly describe any anticipated significant effect the project would have on **Department of Land Conservation and Development**

development, livability, regulatory streamlining, and compliance with federal requirements, socioeconomic gains, and other relevant factors.

C. Equity and Inclusion Considerations. Using the <u>TA Grant Equity Guidance</u>, identify priority populations in the project planning area. Describe the anticipated impact of your proposed project on priority populations. Describe a preliminary outreach and engagement plan with specific goals and outcomes for participation of priority populations in the project. Include specific tasks and products related to the outreach and engagement plan in sections D and E.

- D. Work Program, Timeline & Payment.
 - 1. Tasks and Products: List and describe the major tasks and subtasks, with:
 - The title of the task
 - Steps to complete task
 - The interim and final products for each task
 - **2. Timeline:** List all dates for the project including tentative start date after the contract is signed, task completion dates, and project completion date. If the project is part of a multi-year program, provide an overview of the expected timelines in sequence of expected start dates and completion date for each phase and describe subsequent phases to be completed.
 - **3.** Payment Schedule: Develop a requested payment schedule showing amount of interim and final payments. Include the products that will be provided with each payment request. The payment schedule should generally include no more than two payments an interim and final payment.
- **E. Evaluation Criteria.** Include a statement in the narrative that addresses the program priorities and evaluation criteria presented in the application instructions ("Eligible Projects and Evaluation Criteria").
- **F. Project Partners.** List any other public or private entities that will participate in the project, including federal and state agencies, council of governments, city and county governments, and special districts. Briefly describe the role of each (*e.g.*, will perform work under the grant; will advise; will contribute information or services, etc.).
- **G. Advisory Committees.** List any advisory committee or other committees that will participate in the project to satisfy the local citizen involvement program. Include specific goals for participation by priority populations in advisory committees.
- I. Cost-Sharing and Local Contribution. DLCD funds are only a part of overall project costs; please identify sources and amounts of other funds or services that will contribute to the project's success. Cost-sharing (match) is not required but could be a contributing factor to the success of the application.

Will a consultant be retained to assist in completing grant products? Yes \boxtimes No \square

For cities with populations under 10,000 that are requesting a comprehensive plan update, do
you have interest in using a DLCD-provided consultant to complete your project? Yes \square No \square
Does the applicant intend to seek technical assistance from DLCD's equity and inclusion

Local Official Support

The application *must include a resolution or letter from the governing body* of the city, county, district, or tribe demonstrating support for the project. If the applicant is a council of governments on behalf of a city, a letter or resolution from the city council supporting the application must be included. *The application will not be complete if it does not include this item.* The letter of support may be received by DLCD after the application submittal deadline, but it must be received before a grant is awarded.

Product Request Summary

Product	Grant Request	Local Contribution	1	Total Budget
1	\$ <u>4,800</u>	\$ 	\$	<u>4,800</u>
2	\$ <u>14,200</u>	\$ 	\$	<u>14,200</u>
3	\$ <u>31,000</u>	\$ <u>10,000</u>	\$	<u>41,000</u>
4	\$ 	\$ 	\$	
5	\$ 	\$ 	\$	
6	\$ 	\$ 	\$	
7	\$ 	\$ 	\$	
8	\$ 	\$ 	\$	
TOTAL	\$ 50,000	\$ 	\$	60,000

Submit your application with all supplemental information to:

Gordon Howard, Community Services Division Manager

E-mail (preferred): <u>DLCD.GFGrant@dlcd.oregon.gov</u>

Mail: Department of Land Conservation and Development 635 Capitol Street N.E., Suite 150 Salem, OR 97301

Phone: 503-503-856-6935

APPLICATION DEADLINE: October 1, 2021

REVISED 2021-23 TECHNICAL ASSISTANCE GRANT Department of Land Conservation and Development

City of Newberg Clear and Objective Audit for Compliance with Needed Housing

Project Description & Work Program

A. Goals, and Objectives.

The primary objective of this Project is to prepare an audit and updates to the Comprehensive Plan and Development Code for compliance with Needed Housing as described in ORS 197.307. The audit will focus on clear and objective standards for multifamily housing (5+ units).

Consultant will perform an audit of the Development Code and Comprehensive Plan and deliver recommendations on amendments to ensure the Development Code and Comprehensive Plan are meeting state rules and regulations. The consultants will also be asked to identify any duplicative or conflicting areas between the Development Code and the Comprehensive Plan.

B. Products and Outcomes.

Clearly describe the product(s) and outcome(s) expected from the proposed project. Briefly describe any anticipated significant effect the project would have on development, livability, regulatory streamlining, and compliance with federal requirements, socioeconomic gains, and other relevant factors

The products to be developed will include:

- 1. Project Kick-off to develop a project schedule, Project Management Team schedule, Summary of major tasks for the project and the use of the Planning Commission and Affordable Housing Commission as a Citizen Advisory Committee (CAC) to provide oversight and guidance and feedback in the analysis/audit stage and with the recommended Comprehensive Plan and code amendments. The details are further discussed below.
- 2. Technical analysis and code audit which will include evaluation of the Development Code and Comprehensive Plan, Outreach and Engagement, and Summary Document/Matrix. The details are further discussed under Task 1 below.
- 3. Draft and final Recommended package of code amendments to bring the City of Newberg into compliance. The details are discussed under Task 2 below.
- 4. Draft and final recommended amendments to the Development Code and Comprehensive Plan by Planning Commission and the City Council through an ordinance. The details are further discussed below.

The outcomes anticipated are:

- 1. An updated analysis and audit of Newberg's Development Code and Comprehensive Plan to understand where there are conflicts and problems with the current state rules. This analysis will provide a better understanding of any barriers to building needed housing in Newberg.
- 2. A pathway, with recommended amendments, to update the Development Code and Comprehensive Plan with clear and objective language for multifamily housing (5+ units) to meet the Needed Housing state rules and regulations per ORS 197.307. The Development Code will provide two paths: 1. Clear and Objective 2: Discretionary; providing options for development of multifamily housing in Newberg.

- 3. Assurance that the recommended code amendments are equitable and meet the needs of Newberg's priority populations when developing, building, and living in housing.
- 4. Advancing regulatory streamlining for quicker review times which may reduce the overall cost for multifamily housing projects.

Significant effects may include the production of more housing, especially multifamily housing, providing a variety of housing types for the varying community income levels, ensuring the Newberg is following and in alignment with federal housing regulations, providing housing opportunities that are in alignment with workforce housing needs and housing needs for households at 80% of less of Median Family Income, identifying and updating development regulations to assist in expediting review and development of housing units.

C. Equity and Inclusion Considerations

Priority populations in Newberg

Race ¹	Population amount
Black or African American alone	0.4%
American Indian and Alaska Native alone	0.9%
Asian alone	2.2%
Native Hawaiian and Other Pacific Islander alone	0.2%
Hispanic or Latino	14.3%
Two or More Races	5.4%
Families and Living Arrangements	
Language Other than English Spoken at Home, percentage of persons 5+ years (2015-2019) ²	12.3%
Health	
With a disability, under age 65 years (2015-2019) ²	7.8%
Income and Poverty	
Persons in Poverty ¹	15.8%
Number of Unhoused Individuals in Yamhill County ³	1,386
Percentage of Households less than 30% MFI – Extremely Low Income ⁴	21%

Impact of proposed project on priority populations

This proposed project is intended to update the Comprehensive Plan and Development Code to meet the state rules requiring all Needed Housing to have clear and objective standards per ORS 197.307. This project will focus on providing clear and objective standards to multifamily housing with 5+ units. With the two-path system (clear and objective and discretionary), all multifamily housing will then have an option, without discretion, in the Development Code to be built.

The potential benefits of this proposed project on priority populations in Newberg are listed below:

- An option for a clear pathway for development of multifamily housing, reducing the cost and time for them to get built, which may lower costs for development of income restricted

¹ 2019 American Community Survey (ACS), 5-year estimates

² US Census Bureau QuickFacts, Newberg

³ 2018 Point-in-Time (PIT) Count

⁴ U.S. Department of Housing and Urban Development, Yamhill County, 2020. U.S. Census Bureau, 2014 – 2018 ACS Table 19001. Note: MFI is Median Family Income, determined by HUD for Yamhill County.

- affordable housing and housing in general. This may then increase the number of housing units in the city, especially income restricted affordable housing.
- Less complicated and understandable language for developers and/or builders who may not speak English as a first language.
- Equitable clear and objective language in the Comprehensive Plan and Development Code.
- Reduction in barriers for housing to meet the needs of Newberg's priority populations.
- More housing that is affordable to those with lower incomes.

The potential burdens of this proposed project on priority populations in Newberg are listed below:

- Per the State, Needed Housing is defined as any type of housing and certain types of housing are not considered more "needed" than others. The clear and objective language may make it easier and less costly to build multifamily housing, but developers can continue to build single-family homes, which may be unaffordable to many members of Newberg's priority populations.

Preliminary Outreach and Engagement Plan with Priority Populations

Outreach and engagement for this proposed project will be equitable with an emphasis on working with Newberg's priority populations. This will ensure that existing and proposed Comprehensive Plan and Development Code changes do not provide any barriers for priority populations to building and living in housing. The goals and outcomes related to participation of Newberg's priority populations are listed below.

Goals:

- An equitable distribution of outreach and engagement with an emphasis on Newberg's priority populations.
- Members of Newberg's priority populations have a clear understanding of this project and how to provide input.

Outcomes:

- Focus groups, interviews, and/or outreach events specifically with organizations, persons, and groups in Newberg's priority populations.
- All materials are translated in at least Spanish and English and simultaneous translation will be provided when needed.
- Comprehensive Plan and Development Code language that has been reviewed and vetted by members of Newberg's priority populations.

Specific tasks and products related to the preliminary outreach and engagement plan are below in Tasks 1 and 2.

A post-project evaluation of representation and participation by priority populations in outreach, engagement, and the Citizen Advisory Committee (CAC) will be conducted. Data will be collected and analyzed with outreach and engagement on who participated, who didn't, and level of participation. Those who are members of Newberg's priority populations that participated in outreach events and the CAC will be provided evaluations to answer anonymously on the effectiveness of outreach and areas for improvement.

D. Work Program, Timeline and Payment.

1. Tasks, Products and Timeline.

Task 1: Project Kick-Off

Timeline: January 3, 2022 – February 15, 2022

Budget: \$4,800

Consultant shall hold a meeting with City to kick off the project with City. Consultant will contact City via teleconference, conference call, or in person to inquire about establishing project expectations and familiarize themselves with city-specific concerns.

At the project kick off, Consultant will obtain necessary information and background from City to familiarize Consultant with local conditions and with City's planning documents.

Consultant will also use the kick off to confirm the objectives of the project laid out in this Contract with the City, refine the draft project schedule established in this Contract with City (meaning add more detail as necessary to the established schedule), and provide necessary information to City to allow City to prepare for the Project.

Consultant and City will develop a draft and final Project Management Team (PMT) schedule.

Following the meeting, City with assistance from Consultant will develop a draft and final Public Engagement Plan that describes the communications tools and engagement activities that will be used to inform and engage Newberg residents in the code audit process.

City will establish a Citizen Advisory Committee (CAC) to oversee the project, which will consist of the Planning Commission with help from the Affordable Housing Commission.

Task 1 Consultant Deliverables:

- Kickoff meeting agenda and summary
- Draft and final proposed Project schedule
- Input on Draft and Final public engagement plan

Task 1 City Deliverables:

- Copy of relevant comprehensive plan and code sections, or other relevant City data or documents
- Draft and Final Public Engagement Plan
- Establish Citizen Advisory Committee and conduct orientation meeting

Task 2: Technical Analysis and Code Audit Timeline: February 16, 2022 – June 13, 2022

Budget: \$14,200

Analysis and Code Audit

Consultant will analyze and audit the City's Comprehensive Plan and Development Code for compliance with ORS 197.307 on Needed Housing. The City will provide Consultant access to all relevant available

local data, Development Code sections, and Comprehensive Plan sections. The analysis and audit will include:

- Comprehensive Plan policies that inhibit the use of clear and objective code language for multifamily housing;
- Code language in the Development Code that are barriers to multifamily housing, in particular language that is discretionary where it needs to be clear and objective;
- Analysis, with an equity lens, of existing code language and policies to ensure there aren't any barriers to members of Newberg's priority populations building and living in multifamily housing.

The analysis of existing code and policies will also draw on information gathered through engagement with housing developers and consumers, including underrepresented communities and Newberg's priority populations.

Outreach and Engagement

Citizen Advisory Committee (CAC)

The audit work shall involve meeting(s) with the CAC as needed to identify Comprehensive Plan and Development Code problems and assess how well existing code sections satisfy state requirements and the equity and engagement goals of the project.

General Outreach and Engagement

The City, with assistance of the Consultant, will help plan engagement with housing developers and consumers, including direct outreach to individuals through interviews, focus groups, or other means; and/or hosting events (virtual or in person). Emphasis will be placed on housing developers who work with members of Newberg's priority populations to ensure existing Comprehensive Plan and Development Code language do not create barriers for multifamily housing that meet the needs of members of the priority populations. The engagement efforts will build from past engagement with the City's Housing Newberg Group, Workforce Housing Consortium, Newberg Affordable Housing Commission, Housing Needs Analysis stakeholders, Yamhill Community Action Partnership, Housing Authority of Yamhill County, and Newberg Equity Task Force.

During this stage of engagement and outreach, the City will conduct outreach to gain insight on any existing issues with the Comprehensive Plan and Development Code to meet the requirements for clear and objective language for multifamily housing. At this time analysis will be completed to understand any existing barriers within the code to building and/or living in multifamily housing to meet the needs of Newberg's priority populations. Their perspective will give insight on code strengths and deficiencies and ease of implementation. This engagement will inform the analysis and audit conducted by the Consultant and be included in the final summary and matrix document.

Due to the COVID-19 pandemic, engagement will seek to prioritize outreach to underrepresented groups to the extent reasonably and safely possible at this time within the limited engagement timeframe and resources of this project, and will emphasize outreach through agencies or non-profit groups that represent or work with under-represented communities. While there will be a good faith effort around outreach generally, and particularly to under-served communities, it is understood that the current situation (with the COVID-19 pandemic) presents unique barriers to engagement. In addition, outreach and engagement discussions are likely to occur via videoconference, teleconference, or telephone calls, rather than in-person.

The Consultant will help plan for the engagement, including helping to define the questions and topics for the outreach and methods to solicit input.

Summary Document/Matrix

Following analysis, audit and synthesis of outreach, Consultant will produce a draft summary and matrix that describe which policies and code language need to be enhanced, modified or removed to meet the clear and objective requirements in ORS 197.307 and equity goals for multifamily housing. Consultant will present the draft to the City's Citizen Advisory Committee (CAC) and make it available for public comment. The CAC shall meet to review the draft summary and matrix and provide feedback to the Consultant for the final summary and matrix document.

This task will begin immediately following the kick-off.

Task 2 Consultant Deliverables:

- Outline (via email) of suggested questions and topics for outreach meetings (via teleconference) with staff to plan for engagement with housing developers and consumers
- Agendas and presentations/meeting materials for up to two CAC meetings (Meetings # 2 and #3) (likely by videoconference) with the Committee
- Draft summary document/matrix

Task 2 City Deliverables:

- List of existing housing developer and consumer groups and organizations for engagement
- Schedule and distribute CAC meeting notices and agendas
- Attend CAC Meeting(s) #2 and #3
- Creation/modification of Equity Lens
- Coordinate housing developer outreach and engagement and other engagement events
- Draft summary of information gathered during engagement and outreach

Task 3: Draft and Final Recommended Package of Code Amendments

Timeline: June 14, 2022 – January 13, 2022

Budget: \$41,000

Recommended Code Amendments

Consultant will develop a package of recommended code amendments to bring the City into compliance with state rules around clear and objective language, as well as, the equity goals of this project. The code amendment package will include:

- Recommended changes to Comprehensive Plan policies that inhibit the use of clear and objective code language for needed housing;
- Recommended changes to code language in the Development Code that create clear and objective standards for multifamily housing;
- Analysis, with an equity lens, of the recommended code language and policies to ensure there aren't any barriers to members of Newberg's priority populations building and living in multifamily housing. This analysis will include information gathered from the CAC and engagement efforts from Task 2 and Task 3.

Outreach and Engagement

Citizen Advisory Committee (CAC)

The recommended code amendment work shall involve meeting(s) with the CAC to review the draft code amendments and assess that they satisfy state requirements and the equity and engagement goals of the project.

General Engagement and Outreach

This stage of engagement and outreach will include those who participated in Task 1. They will be able to review and provide feedback on the draft code amendments. Emphasis during engagement will be to hear from the participants that the recommendations are equitable and meet the needs of Newberg's priority populations. This outreach will inform the final code recommendations based on the feedback heard from the participants.

This task will begin immediately following completion of Task 2.

Task 3 Consultant Deliverables:

- Outline (via email) of suggested questions and topics for outreach meetings (via teleconference) with staff to plan for engagement with housing developers and consumers
- Agendas and presentations/meeting materials for up to two CAC meetings (Meetings # 4 and #5) (likely by videoconference) with the Committee
- Draft package of recommended code amendments
- Presentation to Planning Commission and City Council on draft package of code amendments

Task 3 City Deliverables:

- Schedule and distribute CAC meeting notices and agendas
- Attend CAC Meeting(s) #4 and #5
- Assist in preparing and distributing meeting notices and agendas with the CAC and housing developers and consumers from Task 2
- Coordinate housing developer outreach and engagement and other engagement events
- Draft summary of information gathered during engagement and outreach
- Schedule and distribute Planning Commission meeting notice and agenda
- Planning Commission minutes
- Schedule and distribute City Council meeting notice and agenda
- City Council minutes

Task 4: Adoption

Timeline: January 16, 2023 – February 20, 2023 Budget: In-kind City of Newberg staff time

City will schedule and provide notice and an agenda for hearings to adopt the recommended Comprehensive Plan and code amendments. Consultant will coordinate with City on hearing arrangements and present updates to the hearings body or bodies.

Task 4 Consultant Deliverable:

None

Task 4 City Deliverables:

- Presentation materials to explain final draft updates to the Planning Commission and City Council
- Attend Planning Commission and City Council public hearings
- Planning Commission and City Council hearings notices, agendas, and minutes

2. Timeline

The anticipated project schedule would be approximately 13 months from start to completion. The tentative start date for the project would be 30 days after a contract is signed. Each task above is estimated to take 4-6 months. Some tasks may need to run concurrently. The project milestones are tied to the completion of each task identified above. The project completion date would be an estimated 14 months after a contract is signed.

3. Payment Schedule

Interim Payment – After completion of Tasks 1 – 2. Payment amount will be \$19,000.

Products to be provided include:

- 1. Project Kick-off Meeting
- 2. Code analysis and audit summary report/matrix

Final Payment – After completion of Task 3 - 4. Payment amount will be \$31,000.

Products to be provided include:

- 1. Recommended package of code amendments
- 2. Final package of Comprehensive Plan and code amendments
- 3. Adopted Comprehensive Plan and code amendments by ordinance

E. Evaluation Criteria.

DLCD Technical Assistance Grant Program Priority:

1. Promote provision of affordable and workforce housing

The evaluation criteria are addressed below:

1. Project objectives

The primary objective of this Project is to ensure that both the Comprehensive Plan and Development Code are in compliance with Needed Housing as described in ORS 197.307. This will be done through an audit that will focus on clear and objective standards for multifamily housing (5+ units). From this audit, a package of recommended code amendments will be produced for adoption.

2. Program priorities

The project updates the Comprehensive Plan and Development Code to promote provision of multifamily housing through the creation of a two-path system with both clear and objective and discretionary standards.

3. Project description

The approach, budget and products are detailed in Section D of this application.

4. Grantee Capacity

There is adequate staff capacity to successfully manage this project as has been demonstrated with previous DLCD grant-funded projects, including Newberg 2030 (Phases I and II) and the Newberg HNA.

5. Equity and Inclusion

Through engagement, outreach, and an analysis of the recommended code amendments with an Equity Lens; the project heavily values creation of equitable code standards that meet the needs of Newberg's priority populations. Every step of the process will include input from those who are members of Newberg's priority populations and work with those populations. This input will ensure equitable and inclusive code amendments for adoption. Descriptions of the equity and inclusion work for this project are listed in Sections C and D.

6. Leverage

The anticipated cost of the project is approximately \$60,000. The City is requesting a grant for \$50,000. In addition, the City will be contributing \$10,000 and stafftime to the project.

F. Project Partners.

- Department of Land Conservation and Development Advise
- Oregon Housing and Community Services Contribute information
- Fair Housing Council of Oregon Contribute Information and advise
- Newberg Area Habitat for Humanity Contribute information and community engagement
- > Housing Newberg Group Contribute information and community engagement
- > Yamhill Community Action Partnership Contribute information and community engagement
- Newberg Workforce Housing Consortium Contribute information
- > Yamhill County Housing Authority Contribute information
- Newberg Equity Task Force Contribute information and community engagement
- Newberg Affordable Housing Commission Advise
- Newberg Planning Commission Advise
- Newberg Residential Development Community Contribute information and community engagement
- > Real Estate Community Contribute information and community engagement
- ➤ George Fox University Contribute information and community engagement
- Newberg Area Non-profit organizations (Love Inc., CASA of Oregon, etc.) Contribute information
- ➤ Newberg Public Schools Contribute information and community engagement

G. Advisory Committees.

The City of Newberg will establish a Citizen Advisory Committee (CAC) to be advisory to staff and the consultant. The Committee will consist of Planning Commission with help from the Affordable Housing Commission. Both commissions are members of the Newberg community. Some represent priority populations in Newberg and others are advocates for those populations. The goal for the CAC is to provide the consultants and staff insight from the community with emphasis being from those who represent priority populations or work closely with those populations.

The CAC meetings will be open to the public to allow community input. During community engagement efforts for this project, those in the community who represent Newberg's priority populations or work closely with those populations will be encouraged to attend and provide comments.

H. Cost-Sharing and Local Contribution.

The City of Newberg will contribute \$10,000 and in-kind staff time for the project. It is envisioned that the Community Development Director and Housing Planner will be the primary staff contribution. Additional in-kind contributions will come from City Administrative staff support for the CAC, Planning Commission, City Council meetings, and outreach efforts. Finally the city's Community Engagement Specialist would assist with public outreach efforts, project web page, and social media activities.

Local Official Support

The Newberg City Council adopted a resolution supporting the submittal of a Technical Assistance grant to complete an Audit of the Comprehensive Plan and Development Code with Recommended Code Amendments. A copy of the resolution (2021-3765) is included with this application.