

# Housing Stability Council

## MEETING MATERIALS PACKET



Vibrant!  
Portland Oregon

**August 7, 2020**  
**9:00 a.m. – 1:00 p.m.**  
**Oregon Housing & Community Services**  
**Conference Phone**

**Council Members:**  
 Claire Hall, Chair  
 Sarah DeVries  
 Sami Jo Difuntorum  
 Barbara Higinbotham  
 Anna Geller  
 Mary Li  
 Gerardo F. Sandoval, PhD  
 Charles Wilhoite

**AGENDA**  
 August 7, 2020 9:00 a.m.-1:00 p.m.  
 Oregon Housing and Community Services  
 725 Summer St NE, Salem OR 97301  
**Call In Mtg Only**  
 Call-In: 1-253-215-8782 or Toll Free: 1-888-788-0099  
 Meeting ID: 955 2359 5676 Password: 402403



TIME	TOPIC	SWHP Priority	ACTION
9:00	<b>Meeting Called to Order</b> Roll Call		Call Roll
9:05	<b>Public Comment</b>		Discussion
9:15	<b>Meeting Minutes Approval:</b> July 10, 2020		Decision
	<b>Report of the Director:</b>		
9:20	<ul style="list-style-type: none"> <li>• SWHP Milestone 4 report and Year 2 Planning</li> <li>• Legislative Update</li> </ul>		Update
	<b>Homeownership Division (pg. 13)</b>		
10:00	<b>Emese Perfecto, Director, Homeownership Division</b> <ul style="list-style-type: none"> <li>• Manufactured Home Replacement Program: Chelsea Catto, Manufactured Housing Senior Program Analyst</li> </ul>		Briefing
	<b>Affordable Rental Housing Division (pg. 18)</b>		
	<b>Julie Cody, Director, Affordable Rental Housing</b>		
	<b>Multifamily Housing Transactions</b>		
	<ul style="list-style-type: none"> <li>• Hilltop Ranchito Manufactured Home Park: Alan Borges, Production Analyst; Casey Baumann, Production Manager</li> <li>• Stillwater Crossing Apartments: Tyler Young, Lead Production Analyst; Casey Baumann, Production Manager</li> </ul>		Decision
10:30	<ul style="list-style-type: none"> <li>• NOFA Funding Awards (Preservation, HOME only, 9% LIHTC): Tai Dunson-Strane, Senior LIHTC Program Manager, Roberto Franco, Assistant Director Development Resources and Production; Natasha Detweiler-Daby, Assistant Director Planning and Policy</li> <li>• Permanent Supportive Housing, Year-Two Resources, Introduction: Amy Cole, State Development Resources Manager; Natasha Detweiler-Daby, Assistant Director Planning and Policy</li> <li>• Affordable Rental Housing COVID Response Fund, Introduction: Natasha Detweiler-Daby, Assistant Director Planning and Policy</li> </ul>		Decision
	<b>Housing Stabilization Division (pg. 89)</b>		
	<b>Andrea Bell, Director, Housing Stabilization</b>		
11:30	<ul style="list-style-type: none"> <li>• CSBG State Plan: Leeann Marx, CSBG Program Coordinator</li> <li>• LIHEAP State Plan: Tim Zimmer, Assistant Director of Energy Services, David Kaufman, Energy Assistance Coordinator</li> <li>• HMIS Budget Note/HB 5512: Hunter Belgard, HMIS Administrator, Sam Kenney, Senior Operations and Policy Analyst</li> </ul>		Briefing
	<b>Deputy Directors Office (pg. 99)</b>		
12:15	<b>Caleb Yant, Deputy Director, Oregon Housing and Community Services</b> <ul style="list-style-type: none"> <li>• HB2003: Methodology Review and Discussion: Caleb Yant, Deputy Director</li> </ul>		Discussion
12:45	<b>Report of the Chair</b>		Briefing
1:00	<b>Meeting Adjourned</b>		

All times listed on this agenda are approximate and subject to change. Agenda items may also be taken out of order and addressed at different times than listed. The agenda may be amended by the Council at the time of the meeting.

**Council Members:**  
Claire Hall, Chair  
Sarah DeVries  
Sami Jo Difuntorum  
Barbara Higinbotham  
Anna Geller  
Mary Li  
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The Housing Stability Council helps to lead OHCS to meet the housing and services needs of low-and moderate-income Oregonians. The Housing Stability Council works to establish and support OHCS' strategic direction, foster constructive partnerships across the state, set policy and issue funding decisions, and overall lend their unique expertise to the policy and program development of the agency.

The 2019-2023 Statewide Housing Plan outlines six policy priorities that focuses OHCS' investments to ensure all Oregonians have the opportunity to pursue prosperity and live from poverty.

For more information about the Housing Stability Council or the Statewide Housing Plan, please visit Oregon Housing and Community Services online at  
<https://www.oregon.gov/ohcs/OSHC/Pages/index.aspx>

## Statewide Housing Plan Policy Priorities



**Equity & Racial Justice**



**Homelessness**



**Permanent Supportive Housing**



**Affordable Rental Housing**



**Homeownership**



**Rural Communities**

**Council Members:**  
Chair: Clair Hall  
Sarah DeVries  
Sami Jo Difunctorum  
Barbara Higinbotham  
Anna Geller  
Mary Li  
Gerardo F. Sandoval, PhD  
Charles Wilhoite



## July 10, 2020

### Oregon Housing Stability Council Meeting Minutes

Acting Chair Wilhoite called the meeting to order at approximately 9:00 am, and then asked for the roll call:

#### Agenda Item: Roll Call

Councilmember	Present	Excused	Absent	By phone
Devries, Sarah		X		
Difunctorum, Sami Jo		X		
Chair Hall, Claire	X			
Higinbotham, Barb		X		
Geller, Anna	X			
Li, Mary	X			
Sandoval, Gerardo	X			
Wilhoite, Charles	X			

\*With at least five members in attendance, we have reached a quorum for voting purposes

#### Public Comment:

No public comment was received.

#### Report of the Director:

Director Salazar outlined three areas for updates from the Divisions within the agency:

- COVID-19 Response
- Equity and Racial Justice
- Legislative Update

Housing Stabilization Division Director Andrea Bell provided an update on 19-21 Budget and COVID-19 Resources:

Rental Market Resources update – these are one time legislative funds for education, outreach and technical assistance. Awarding these funds to Community Alliance of Tenants and Fair Housing Council of Oregon. Given all the new policies and changes impacting renters right now, this is critically important.

HB 2032 TANF - these are funds for DHS and OHCS to collaborate on rental assistance programs specifically for TANF recipients. This new pilot program is on pause and the future is yet to be determined.

COVID-19 Response – we have been providing guidance on how communities can strategically use various resources to help meet public health requirements. This is particularly true for shelters to move towards non-congregate shelter. In addition, data collection through the Budget Note process is explicitly needed right now as we work to change systems that have shown disproportionate impact to communities of color, and to inform future investments and program delivery mechanisms going forward. In the fall when we were reporting about programs, we had about \$27M in new programs and now since March 2020 we are near \$200M – including a mix of federal and state programs. The majority of these funds have gone out and services are available to people across the state. There are a few new resources that will be coming soon. We are experiencing new perspectives regarding homelessness prevention and homelessness response systems, and finding the systems change work that is needed can be regenerative and healing as we respond to the need with appropriate investments.

**Question about how to possibly move from \$27M to \$200M in a short time frame?**

The topic of capacity is always an issue and understanding what the capacity needs are and where we need to shore it up. Grantee partners have done heroic work over the past months and continue to do that in order to ensure the dollars are optimized. One of the areas that we can show up to understand capacity needs in an authentic way is to keep the lines of communication open between grantees and their sub grantees to understand how funds can be optimized or more flexible, and to make sure our guidance is clear about the mechanics to administer the funds.

Director Salazar added that we are in sprint mode and haven't really had time to digest these changes in order to ask you the right questions. There are a couple of key sources of funds, allocated through the E-Board from the Coronavirus Relief Funds through the CARES Act for energy assistance and rental assistance. Those funds have to be expended by December 30, 2020. The time for thoughtful programming is not built into those resources. We commit to keeping you updated about those resources. There are additional funds that are not on the same timeframe and we can be more thoughtful.

**Question about administrative capacity – can existing partners administer these dollars?**

**Capacity for our current partners to engage in a racial justice agenda?**

Prior to COVID-19 we were on a trajectory to improve data. We are getting demographic data about who is being served. The questions now are who isn't being served and why? That's a different topic and the next piece is that we have to invest appropriately. When we look at community penetration to make sure that the dollars are landing in the intent we want, and if they aren't then why? Under COVID-19 we may have to slow things down and look at what is happening, and be ok in saying we need to do something different to address disproportionate impacts.

Director Salazar added that we are talking with Community Action Agencies about what they are doing to partner with Culturally Specific Organizations. We are also hearing from Culturally Specific Organizations, that they are not being funded to the extent they feel is appropriate. For example, why are we reinventing the wheel with language services when they are long term trusted partners? Also there are conversations in the Governor's office that are exploring how to work with culturally specific partners differently.

On behalf of Affordable Rental Housing Division Director Julie Cody, Natasha Detweiler provided an update about COVID-19 engagement with partners and new initiatives in response to the crisis.

The Affordable Rental Housing Division has continued engagement to understand COVID-19 impacts with partners. We are in frequent contact with lenders, investors and developers about impacts to the affordable housing pipeline. We are closing projects in the pipeline, but we know that for newer projects there may be issues with tax credit pricing. Rent collection isn't as bad as expected, but anticipating we haven't seen the worst of it yet with the pending expiration of unemployment benefits and end of the eviction moratorium in September/October timeframe. In terms of lenders, they haven't had loan forbearance issues yet, and they are stress testing portfolios. Investors are prioritizing existing relationships with strong financial backing however we know not all of our partners are in that position, especially smaller organizations and culturally specific organizations. They raised the about flag changes to the Community Reinvestment Act (CRA), allowing more ways for banks to meet CRA requirements. These changes could actually have a sustained negative impact on tax credit pricing especially in urban areas. Good news is that construction costs aren't escalating right now. In light of the economic downtown, the State Treasurer has determined there is not enough revenue for Lottery Backed Bonds, impacting a planned offering in 2021 for Preservation. We are looking at the funding calendar to see what we might be able to shift around to see if we can offer preservation in the next year, however will need to continue working on it and plan to have additional conversations with you.

In terms of programs in response to COVID-19, we are looking to launch the \$20M Affordable Rental Housing COVID Response Fund. As indicated earlier, CARES Act Coronavirus Relief Funds must be used by Dec 2020. Modeling shows that over the next 12 months there will be about \$65M needed for properties in the portfolio. We are trying to adjust for \$20M that needs to be spent now and how to have the most impact. Current thinking is to make loans to properties in the portfolio impacted by tenant nonpayment of rent that are having difficulty in keeping the projects operating. As previously mentioned, rent collections are higher than anticipated and some projects, such as projects without rent assistance or 60% AMI workforce affordable housing where tenants are not earning income and may not be receiving unemployment. There are a subset of projects that are having more critical needs, where we can focus the \$20M now. The idea is to stabilize the project, and be satisfied by settling tenant arrearages. We are getting feedback from stakeholders, but would like to align the resources with the end of the eviction moratorium. We will post a draft concept for public input, and continue outreach.

We are working to respond to capacity needs for organizations impacted by COVID-19 due to unexpected costs and needing to redirect scarce resources to continue operations. There is about \$400,000 in capacity building resources available for recovering costs due to technology needs and teleworking. Anticipate a RFA or RFP in the next 3-4 weeks.

The majority of rental assistance is delivered through Housing Stabilization Division but Affordable Rental Housing Division has been in consultation with Business Oregon on Community Development Block Grant for rental assistance. Through additional allocation of CARES ACT CDBG, Business Oregon has determined 30% of those resources will be set aside for new emergency assistance, totaling \$5.4M in rent assistance. They have completed public comment to adjust and refine the program before deploying. It will be a competitive program, and must be administered through units of local government. Income levels will be at 50%-80% of AMI to differentiate from other rental assistance programs that serve lower incomes. These funds can be used for up to 3 months of rental assistance.

### **Question about Lottery Bonds being already committed to projects?**

We did not forward allocate those resources so they were not yet committed to projects, and had planned to offer those resources in 2021.

**Question eligible uses for the \$20M in funding**

These funds are for projects in the OHCS portfolio that have not been able to get rents due to COVID-19 non-payment of rent. The idea is we are trying to fill the operating void, in essence trying to get wholesale pricing on rents so we can invest in satisfying the operational need for resources so they can forgive a larger portion of arrearages. We know there are some heavily impacted projects now.

**Question about the expectations to forgive the arrearages. Is that a specific condition of receiving the funds? When we make these available they can use it flexibly, is that correct?**

There will be nuances to the program. The current idea is we give them a loan, they can use it however they want to keep operations going. Low to no interest with allowances to repay it anytime, or provide something in exchange, such as forgiving tenant arrearages. We have concerns about onslaught of evictions. We believe landlords should be doing everything they can to avoid evictions because it's costly, and trying to keep tenants in the units.

Director Salazar added we will be bringing this back to the Council for your input and appreciate your insight at this time.

**Question/Statement about how to replicate this flexibility for homeowners:**

In the same way we are offering flexibility of this resource for developers, wondering in the same vein are we are looking for the same flexibility for homeowners to make those same decisions about what is best for them. Can we replicate the stance we are taking with developers into the way we are working with households so they can tell us how they need the funds, understanding there may be not always be flexibility with programmatic constraints.

On behalf of Homeownership Division Director Emese Perfecto, Kim Freeman provided updates. Homeownership Division hasn't received any CARES funds yet. In terms of staying in touch with our partners, we know they are experiencing a huge call volume regarding forbearance, especially because this is a new term that people don't understand. Certified housing counselors are doing an amazing job working with homeowners – they are being creative in how they are working with homeowners and homebuyers to deliver programs and support. We are working on capacity issues with our smaller partners, and listening to their needs. We expect Homeownership Division to be busy after the forbearance period has ended.

Some exciting things we are doing in response to COVID is to reallocate funds to Homeownership Centers to help with volume of calls they are receiving. We now have new grant agreements in place to assist consumers during these times. We also offered some training funds through virtual trainings. We allowed flexibility in the trainings they selected and 14 organizations participated in a variety of types of training topics including HUD certification, capacity, or community engagement – basically anything that would help Homeownership Centers increase or improve their services. Additionally \$8M in Down Payment Assistance funds were awarded to 19 organizations within 34 counties. Mortgage rates are very low and there are a lot of people still purchasing homes. However, housing supply may be an issue in some areas. Lastly, we are doing some cross sectional work in looking at the possibility of using rent assistance in manufactured home park communities to potentially help pay space rent.

Director Salazar introduced Tricia Tillman, OHCS' new Equity Diversity and Inclusion Manager who is working closely with program leads to ensure we have a solid infrastructure at the agency to lean into this work.

Tricia began by expressing appreciation for the foresight of Housing Stability Council along with Director Salazar in prioritizing this work. It's important this work started before the crisis. The SWHP helped the agency move forward with intentionality. Typically agencies are aspirational and talk of equity and racial justice, but we also have to address the painful and horrific consequences of institutional racism and lean in to respond courageously. Tricia provided an overview of OHCS Equity and Racial Justice Structure.

As a result of the investment and commitment to equity and racial justice in the SWHP, there has been a lot of work happening at OHCS. There has been an active Diversity, Equity and Inclusion Council, the GARE Leadership Cohort, a Data Equity Workgroup, and a team of people working on training. As a result of GARE, we were able to use an equity toolkit to review legislative concepts and proposals. However, the work wasn't structured to coordinate an equity and racial justice agenda. The new structure will start with an Equity and Inclusion Council and the whole Executive Team will serve on this Council which is very unique but important to propel this work. We will continue to have a leadership training cohort to build organizational leadership capacity. That will prepare people to lead in this structure and in the programs. We have a Professional Development committee and they will be tasked with establishing mandatory trainings for executive level, managers and all-staff trainings. The Data Equity Workgroup will continue their work in disaggregating data, and identify where data systems are lacking, trying to improve data quality and make recommendations around how to improve IT systems as well as how we report the data for transparency so we can see how we are achieving racial equity in our outcomes. A new group is a Diversity and Inclusion Best Practices committee to build best practices into human resources and also expanding the work with MWESB. The last piece is the Equity Policy Think Tank. That group will be responsible for doing equity reviews, not only of legislative concepts but also looking at budget, program and policy design and development. A lot of work to do within this structure, and anticipating launch in the fall.

Tricia highlighted priority pieces of work:

- Preparing for 21-23 Legislative Agenda
- Looking at Program and Policy Work with racial equity lens
- Looking at how we comply with civil rights law
- Expanding and deepening relationships with culturally specific organizations

A lot of this work is proactive and responsive. We also need to look at where there have been efforts to under mind this agenda. Whether this is with staff or contractors. We are not doing this in isolation. We are coordinating with Governor Brown's office and other agencies that have been making investments for a number of years that can provide models for helping us move forward, as a state and not just as an agency.

**Question about how this relates to programmatic level. Later today we will hear about MWESB and focus at the programmatic level. What is the relationship between this structure and accountability for the people we fund?**

The whole structure centers equity and racial justice. When programs are thinking about policy or expanding MWESB, the Think Tank would be involved. There will be an internal process for when these type of changes would be reviewed. Diversity and Inclusion Best Practices is MWESB, looking at it from a procurement or data tracking system to see what we have in place to support this. At the Data Equity Workgroup, we are breaking apart the data to see where we are contracting. And training will

broaden the capacity to do this work on a daily basis. The Equity Policy Think Tank will have internal and external membership. There are people that have a depth of expertise from outside the agency that we can benefit from engaging in the Think Tank.

Director Salazar invited Nicole Stoener, Senior Legislative Coordinator to provide an update.

Nicole provided a brief update on the short session where 22 bills were passed. Legislators worked on COVID response and also visited some unfinished business from the 2020 session. They also responded to community calls for police accountability. As it relates to housing three key bills passed:

- HB 4213 Extended the Eviction Moratorium until the end of September 2020, and added a grace period tenants will have until the end of March to make up missed rent payments.
- 
- HB 4204 Foreclosure Moratorium until the end of September 2020. Payments are due at the end of the loan period unless they work out another agreement.
- 
- HB 4212 Omnibus COVID Response Bill to allow flexibility with IDA's; participants can access their savings in times of an emergency without a penalty. They also extended usage of the IDA program to include an Emergency Savings Account.

Additional legislation involves Shelter Siting – allowing flexibility for siting shelters and car camping. This emergency period is limited to 90 days.

There are plans for another additional special session in August to balance the budget and reallocate resources.

On the federal level: Appropriation bills for HUD includes moderate increases to HUD programs. Additionally, there is legislation to block the current administration Mixed Status rule and also prevent HUD from taking action on the Equal Access rule. Legislation that will prohibit the US Interagency Council on Homelessness from investing in homeless programs that are not best practices or not in alignment with housing first models.

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#### **Approval of Meeting Minutes for June 5, 2020:**

Acting Chair Wilhoite introduced meeting minutes for council approval and called to motion.

Councilmember Hall moved to accept the minutes, and Councilmember Sandoval seconded the motion.

Acting Chair Wilhoite then called for the vote.

#### **Agenda Item: Meeting Minutes Approval**

**Motion:** Move to approve the Oregon Housing Stability Council Meeting Minutes from June 5, 2020

Councilmember	Motion	Yes	No	Abstain	Excused
Devries, Sarah					X
Difunctorum, Sami Jo					X
Chair Hall, Claire	1	X			
Higinbotham, Barb					X
Geller, Anna		X			

Li, Mary		X			
Sandoval, Gerardo	2	X			
Wilhoite, Charles		X			

\*With five members voting to approve, we have met the quorum requirements to pass this item.

## Homeownership Division Report

Emese Perfecto, Director, Homeownership Division

### Oregon Homeowner Stabilization Initiative Update: Carmel Charland, OHSI Program Manager

More information can be found [here](#).

**Council Comments/Questions:** NA

## Affordable Rental Housing Division

Julie Cody, Director of Affordable Rental Housing

### Multifamily Housing Transactions:

Director Cody introduces staff.

Additional information can be found [here](#).

### Agenda Item: Glenhaven Park Apartments

**MOTION:** Move to approve Pass-Through Revenue Bond in an amount up to and not to exceed \$12,750,000 to Glenhaven Park LLC for the acquisition and rehabilitation of the four sites encompassing the project known as Glenhaven Park Apartments, subject to the borrower meeting OHCS, Lender (Umpqua, NOAH and USDA RD) & Investor (PNC) underwriting and closing criteria, documentation satisfactory to legal counsel and State Treasurer approval of the bond sale

Councilmember	Motion	Yes	No	Abstain	Excused
Devries, Sarah					X
Difuntorum, Sami Jo					X
Chair Hall, Claire		X			
Higinbotham, Barb					X
Geller, Anna	1	X			
Li, Mary		X			
Sandoval, Gerardo	2	X			
Acting Chair Wilhoite, Charles		X			

Pass/Fail 5:0:0:3/ PASS

### LIFT Homeownership NOFA Awards: Amy Cole, State Development Resources Manager

### Agenda Item: LIFT Homeownership NOFA Awards

**MOTION:** Approve the LIFT funding recommendations for the following projects:

- 27th Bend in Bend, \$900,000 in LIFT funds

- Alder Commons in Hillsboro, \$800,000 in LIFT funds
- DevNW CLT in Eugene and Corvallis, \$3,115,000 in LIFT funds
- Foster Road Condos in Portland, \$3,900,000 in LIFT funds
- Kidd Court in Forest Grove, \$300,000 in LIFT funds
- Lincoln City Affordable Homes in Lincoln City, \$140,000 in LIFT funds
- Orchard District Cottages in Bend, \$340,000 in LIFT funds
- Quince Townhomes in Redmond, \$705,000 in LIFT funds
- Yeoman Townhomes in Bend, \$600,000 in LIFT funds

Councilmember	Motion	Yes	No	Abstain	Excused
Devries, Sarah					X
Difunctorum, Sami Jo					X
Chair Hall, Claire		X			
Higinbotham, Barb					X
Geller, Anna	2	X			
Li, Mary		X			
Sandoval, Gerardo	1	X			
Wilhoite, Charles		X			

Pass/Fail 5:0:0:3/ PASS

#### **LIFT Rental NOFA Awards: Amy Cole, State Development Resources Manager**

##### **Agenda Item:** 2020 LIFT Rental NOFA Award Recommendations

**MOTION:** Approve the LIFT funding recommendations for the following projects:

- Barnes Butte Vista in Prineville, \$4,750,000 in LIFT funds
- East Q Apartments in La Grande, \$7,400,000 in LIFT funds
- Hermanson Preserve in Woodburn, \$7,350,000 in LIFT funds
- Las Adelitas in Portland, \$5,440,570 in LIFT funds
- Lincoln St. Apartments in Eugene, \$3,412,500 in LIFT funds
- Minnesota Places in Portland, \$3,537,499 in LIFT funds
- Ontario Townhomes in Ontario, \$5,325,000 in LIFT funds
- St. Helens Apartments in St. Helens, \$13,400,000 in LIFT funds
- Stark Street in Portland, \$3,812,500 in LIFT funds
- TBD Sunshine Apartments in Roseburg, \$9,800,000 in LIFT funds

Councilmember	Motion	Yes	No	Abstain	Excused
Devries, Sarah					X
Difunctorum, Sami Jo					X
Chair Hall, Claire		X			
Higinbotham, Barb					X
Geller, Anna		X			
Li, Mary		X			
Sandoval, Gerardo	1	X			
Wilhoite, Charles	2	X			

Pass/Fail 5:0:0:3/ PASS

**MWESB Final Report and Implementation Plan:** *Rick Abrego, Sr. MWESB Program Analyst; Roberto Franco, Director of Development Resources & Production*

**Agenda Item:** Affordable Rental Housing MWESB Strategy – Final Report and Implementation Strategy

**MOTION:** Housing Stability Council accepts the MWESB Strategy Report provided by John Jackley which provides a framework to develop an Affordable Rental Housing MWESB implementation strategy.

Councilmember	Motion	Yes	No	Abstain	Excused
Devries, Sarah					X
Difuntorum, Sami Jo					X
Chair Hall, Claire		X			
Higinbotham, Barb					X
Geller, Anna		X			
Li, Mary	1	X			
Sandoval, Gerardo	2	X			
Wilhoite, Charles		X			

Pass/Fail 5:0:0:3/ PASS

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## Report of the Chair

NA

**Adjourned at 12:30**



## OHCS Statewide Housing Plan Milestone 4 Update July 2020



### EQUITY AND RACIAL JUSTICE

5-Year Target: Pending target identification

#### Equity and Racial Justice Year 1 Strategies

1. Identify an approach to advance equity and racial justice (ERJ) for OHCS, our stakeholders, and customers
2. Improve data collection of equity measures
3. Adopt framework for inclusion and equity

Tricia Tillman joined OHCS as a **permanent DEI Manager** and has lead an organizational assessment to support this priority. We have made significant progress in **adopting a structure** focused on identifying and advancing equity and racial justice among staff and in program and policy to better serve all Oregonians. We are working on **updating strategies and metrics** for this priority including, where possible, performance targets.

OHCS leadership made strong internal and external statements in support of **Black Lives Matter** and in opposition to racialized police violence and structural and institutional racism. Our DEI Manager has led multiple sessions providing staff with the opportunity to reflect on this violence and the death of Amaud Arbery, George Floyd, Breonna Taylor, and others. Additionally, in honor of Fair Housing Month, **89% of staff participated in The Color of Law training** by Teaching Tolerance. Also in this quarter, OHCS piloted a **racial equity toolkit** reviewing three legislative concepts and provided guidance on a funding strategy to support culturally-specific homeownership centers.

Our Data Equity Workgroup (DEW) developed a comprehensive outline for a "**State of Data Equity at OHCS**" report that we plan to focus on over the next year. DEW also developed a table outlining demographic data fields that we collect, gaps in our data, and challenges we might have collecting better data that will be the foundation for the report.



### HOMELESSNESS

5-Year Target: Pending baseline & target identification for percentage housed for more than 6 months after receiving services

#### Homelessness Year 1 Strategies

1. Coordinate with partners and providers, and build capacity to address homelessness
2. Coordinate to end veteran homelessness
3. Integrate asset-building and anti-poverty resources to support housing stabilization
4. Enhance homeless service provider data and research capacity

Our work related to COVID-19 response has **accelerated some of the goals** in this priority. We have improved partnerships with Community Action Agencies (CAAs) and **increased resources and focus on data collection**. HMIS has been instrumental in reporting new **COVID-19 Rent Relief Program (CVRP)** **funds** and has allowed OHCS to quickly and effectively allocate over **\$50 million** in CVRP funds. In an unprecedented move, CAAs had the ability to start entering data related to COVID-19 resources in HMIS before funds were even available.

Agencies are receiving funds to support data entry, more data is used to measure outcomes, and data quality has been incorporated into monitoring plans. OHCS uses this data for forecasting, to get weekly updates, and to address spend-down concerns. Additionally, we are **finalizing data dashboards** showing each CAA's EPIC outcomes and, through the HMIS Budget Note recommendation, we are working to secure a **data warehouse to support statewide data sharing**.

The **OHCS Veteran's team continue to host regular check-in calls** with partners to discuss efforts and resources to address veteran homelessness. Due to the global pandemic, we are planning to host several virtual Veteran-specific convening sessions in the fall to share best practices, resources, and to connect our network of providers to end veteran homelessness.



## PERMANENT SUPPORTIVE HOUSING

5-Year Target: 405 of 1,000 PSH units built or in the development pipeline

### Permanent Supportive Housing Year 1 Strategies

1. Solicit new permanent supportive housing (PSH) funding and align capital for supportive services
2. Explore creation of state-funded tenant and project-based rental assistance program
3. Incorporate incentives for PSH housing development in existing funding sources

The **Oregon PSH Institute** model of bringing people across the state together in a monthly in-person convening, has been upended by COVID. It has taken some time to rework, but we will start soliciting partners in August and plan to host a **virtual PSH Institute** in the fall. Because we have a smaller pot of PSH development resources (\$14 million) than was issued to the first PSH Institute cohort (\$36 Million), we are considering ways to leverage other funding sources to fully subscribe our nearly 300 rent assistance and services funding slots.



## AFFORDABLE RENTAL HOUSING

5-Year Target: 12,185 of 25,000 units built or in the development pipeline

### Affordable Rental Housing Year 1 Strategies

1. Expedite affordable housing delivery with technology, improved processes, and partnerships
2. Provide training and technical assistance on funding sources, application, and compliance to partners and project sponsors
3. Support affordable housing in transit-oriented areas and near affordable transportation

We continue to support housing delivery through the adoption of better processes and technology. Our **new, unified electronic application** was used for four different program offerings and nearly 50 applications. We supported live and prerecorded trainings, as well as extensive FAQ responses. We communicate with partners through the system and we are using it internally for file and application review.

The ability to communicate with partners and transmit important documents via a secure interface turned out to be a very timely upgrade to our capabilities. The **new systems have already helped us** in our response to the changing nature of how we do work during the pandemic.



## HOMEOWNERSHIP

5-Year Target: 610 of 6,500 mortgage-lending products in calendar year 2019; and 371 Oregon Bond Residential Loans in the 1<sup>st</sup> and 2<sup>nd</sup> quarter of 2020.

### Homeownership Year 1 Strategies

1. Engage with organizations that can connect communities of color to OHCS homeownership programs and ensure program parameters are aligned with the needs of communities of color
2. Support programs that address unmet need of low- and moderate-income potential homebuyers
3. Support low-cost homeownership opportunities through manufactured housing

Our homeownership center (HOC) partners have experienced increased calls for **assistance related to forbearance and client services**. We utilized \$500,000 in Homeownership Assistance Program (HOAP) funds to support the 15 HOCs assisting homeowners affected by the economic impacts of COVID-19. We continue to host **monthly HOC partner calls** to ensure we understand our partner needs.

We are working on completing the programmatic framework for our **new TBA lending program** and reaching out to stakeholders for feedback on our draft program design. Unfortunately, with the volatility of the mortgage market, we have seen a decrease in the use of the Oregon Bond Residential Loan program. In regard to the **Oregon Homeownership Stabilization Initiative** (OHSI), we implemented wind-down plans but received approval from the U.S. Treasury to continue OHSI with recycled funds to assist homeownership impacted by the economic downturn.

### **The Manufactured Housing Advisory Committee**

(MHAC) has been working on issues related to the Umatilla flood and developing the **manufactured dwelling replacement program**. The program will provide a forgivable loan product to qualified homeowners who wish to replace their substandard and unsafe homes. Funds are expected to be leveraged with other resources to enable borrowers to affordably replace their homes.



## RURAL COMMUNITIES

5-Year Target: 532 of 2,543 units built or in the development pipeline

### Rural Communities Year 1 Strategies

1. Build relationships with providers, development partners, local government, and tribal

- communities to facilitate access to OHCS program resources
- 2. Tailor programs for small towns/rural communities to the needs and context of those areas
- 3. Develop strategies to meet farmworker needs and engage the agricultural community to understand their needs

The **Greater Oregon Housing Accelerator** (GOHA) program was part of the package of potential budget cuts sent to the Governor for consideration. Work has been paused on this until we receive information about its status. In the meantime, we are working on soliciting a training and **technical assistance provider for our rural trainings**. We are also working on a COVID-related capacity offering (to be published in an RFP in the summer) that can support rural partners who have had to invest in technology and other means in response to COVID.

Our efforts to apply a rural lens to our offerings has paid off. For the first time in the program's history, **more applications were received for LIFT non-urban projects** than LIFT urban projects. This is a great indicator that when resources are available, partners will work to build the capacity to respond. **Gap resources** will become even more important to make projects work if tax credit pricing declines or investors are more hesitant to back rural projects.

There has been extensive outreach to understand how COVID-19 is impacting our agricultural workers, including a plan to collaborate with other state agencies to provide emergency support to these communities. Because of the pandemic, our research contractor is actively working on new ways to collect the data they need for the **agricultural workforce housing study**. However, there is still a great amount of uncertainty around timeline and approach.

## **Challenges**

### Staffing Needs

- Resources were quickly focused on crisis response and management with the onset of COVID-19. Some work has been delayed due to this shift because of the lack of available staff resources to address multiple competing priorities.
- Continued outreach and maintaining relationships take time and is a key component of our success in meeting the needs of Oregonians. And given that we are still in the process of hiring staff from the 2019 legislative session, we are not operating at full capacity.

### Collaboration and Coordination

- With social-distancing measures, we have had to cancel our Veterans Convening and other in-person stakeholder meetings. Internally, in-person trainings and conferences have been canceled

and we are working to provide online resources and training to fill the gap. Additionally, staff are working through the challenges of working from home – systems access, child care issues, adjusting to new ways of collaborating and meeting, etc.

- We are working to envision and plan for what the future environment might bring us. We have met with a number of our stakeholders to try to delineate the impacts that COVID-19 has and will have on Oregonians.

## **Areas for HSC Support**

### Supporting Change Efforts with our Partners

Leveraging HSC connections to encourage adoption of and gather constructive feedback on OHCS efforts.

Advocacy We would like HSC to continue to share our work and progress on the Statewide Housing Plan.

Flexibility As we work through the changes brought on by this pandemic, we ask for your support, understanding, and insights as we try to figure out how our SWHP goals and objectives might change to best support Oregonians.



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August 7, 2020

To:      Housing Stability Council  
          Margaret Solle Salazar, Agency Director

From:    Chelsea Catto, Manufactured Housing Senior Program Analyst  
          Emese Perfecto, Director Homeownership

Re:      Manufactured Housing Decommissioning and Replacement Pilot Program Briefing

---

**There is no motion for approval required on this framework today.**

**Background:**

The 2019 Legislative Session, through HB 2896, provided OHCS with several opportunities to develop new resources to preserve manufactured dwelling parks as affordable, including the allocation of \$2.5 million for OHCS to provide grants to qualified individuals/entities to safely decommission and dispose of inefficient and unsafe manufactured homes, and subordinate loans to qualified individuals to affordably replace these homes.

Subordinate loans are intended to fill a subsidy gap and be layered with existing home replacement resources, including a first position loan, energy incentives, weatherization incentives and the decommissioning grants. Decommissioning grants are intended to facilitate the safe decommissioning and disposal of older manufactured homes (many of which contain hazardous materials), removing them permanently from the market.

Data collected by the DC-based nonprofit Prosperity Now shows that manufactured housing is one of the largest sources of unsubsidized affordable housing in the country. In Oregon, 51% of manufactured housing is affordable, compared to only 25% of all housing. A Prosperity Now study also found that manufactured homeowners tend to spend considerably less of their income on housing than residents of other kinds of homes. Yet, approximately 41% of the manufactured homes in Oregon are more than 40 years old (pre-1980), which poses significant health and safety challenges, particularly for households that tend to have lower median household incomes (\$38,466 for manufactured homeowners compared to \$72,519 for all homeowners).



**Pilot Program Development Status:**

Staff plan to use an RFP process to contract with an approved lender for the administration of the subordinate loans and decommissioning/disposal grants under this Manufactured Housing Decommissioning and Replacement Pilot Program. This will enable funding resources to be streamlined efficiently into one package in order to provide the borrower with a replacement process that is as straightforward as possible.

Loans and grants will be available to manufactured homeowners statewide who are located on land that they own, or in eligible manufactured dwelling parks – specifically parks that have been permanently preserved by nonprofits, housing authorities or resident-owned cooperatives, as well as parks on tribal lands, and investor-owned parks, provided that the owner enters into a regulatory agreement with OHCS.

Program development efforts to date include:

- Rulemaking during June and July 2020, utilizing a Rules Advisory Committee made up of community partners. Draft rules are currently under review with the Department of Justice.
- Establishment of a manufactured housing replacement subcommittee by the Manufactured Housing Advisory Committee to concurrently work on mapping out the replacement process and homeowner experience in order to identify existing expertise and gaps.
- Introduction of the program design to internal review teams (PPRC and Executive Team), as well as external stakeholders.

**Loan/Grant Terms:**

Anticipated loan terms include:

- No minimum loan amount and maximum loan of \$35,000, or as set by legislation;
- Replacement home must meet energy efficiency standards (NEEM 1.1 and NEEM 2.0 specifications or equivalent);
- 0% interest rate;
- No principal payments required;
- Subordinated to a primary home loan;
- Original loan balance will be reduced incrementally and forgiven completely after 10 years. If the home is sold before the 10 year period is up, the outstanding balance at the time of sale must be repaid upon sale unless the loan is assumed by an income-eligible buyer approved by OHCS or the remaining balance is forgiven early by OHCS due to hardship.
- The loan will be secured by a filed or recorded security interest;



- A program loan may be made to refinance an existing subordinate loan, provided the loan was made for the purpose of a qualified manufactured dwelling replacement and was made after January 1, 2020;
- Unless otherwise directed, the outstanding balance must be repaid upon the borrower's sale, voluntary transfer or relocation of the manufactured dwelling without prior OHCS written consent.

Anticipated grant terms include:

- Grants may not exceed 80 percent of the cost of decommissioning and disposal;
- Grants may be prioritized for the safe remediation of homes with environmental and public health hazards and risks, including asbestos, lead paint and mold;
- Documentation, as outlined in the RFP, confirming proper disposal of the old home is required;
- A qualified individual or entity may apply for and receive a grant without applying for and receiving a subordinate loan.

### **Eligibility:**

Borrower eligibility for replacement loans is as follows:

- The home must be the borrower's primary residence throughout the term of the loan;
- The home must be located in a manufactured dwelling park that has entered into a regulatory agreement with OHCS, or will be sited on 'fee simple' land owned by the borrower;
- Incomes may not exceed the greater of 100 percent of the statewide or local area median income adjusted for household size at the time the loan is approved;
- Homeowners must be able to obtain primary home financing from another source that is acceptable to OHCS; and

Eligibility for decommissioning/disposal grants are as follows:

- An individual who owns a manufactured home sited in a manufactured dwelling park that has entered into a regulatory agreement with OHCS, or on land owned by the individual.
  - a. Incomes may not exceed the greater of 100 percent of the statewide or local area median income adjusted for household size at the time the loan is approved
- A nonprofit, resident-owned cooperative, housing authority, local government or state governmental entity that has a controlling interest in either the manufactured dwelling or the manufactured dwelling park where the home slated for disposal is sited.



**Stakeholder Engagement:**

OHCS has been a participant in various stakeholder groups dedicated to identifying creative and flexible ways to address manufactured housing preservation in Oregon for a number of years. The funding request through HB 2896 for subordinate loans to replace old and inefficient manufactured homes was initiated and developed by partner organizations.

We are currently working with multiple stakeholders as we develop the pilot. To date, we have:

- Utilized the expertise on the Manufactured Housing Advisory Committee (MHAC) to specifically work on manufactured housing replacements, including the formation of a manufactured housing replacement subcommittee to map the process, as well as identify the barriers that may prevent manufactured homeowners, including homeowners of color, from being able/willing to replace their homes. The MHAC includes tenants, landlords, and representatives from Business Oregon, the Department of Consumer and Business Services, the Department of Environmental Quality, Umatilla Electric Cooperative, DEV NW, Neighborworks Umpqua, Craft3, Commonworks Consulting, St. Vincent de Paul of Lane County, Network for Oregon Affordable Housing (NOAH), Community in Action, CASA of Oregon, Oregon Office for Community Dispute Resolution, and Portland Community Reinvestment Initiatives (PCRI). The manufactured housing replacement subcommittee also includes external partners such as Energy Trust of Oregon and NeighborImpact who bring additional expertise to the conversation.
- Met with tribal members to discuss manufactured home replacement opportunities in parks on tribal lands, with plans to continue that discussion. In addition, we have begun discussions with culturally specific and culturally responsive organizations to determine whether the program presents unintended barriers for manufactured homeowners of color. Stakeholder engagement will continue over the next few months.

**Commitment to Equity and Racial Justice:**

Households of color are disproportionately impacted by predatory lending practices. Chattel lending, which is predominantly used when buying a manufactured home, has a reputation for high interest rates and predatory practices. By providing flexible and forgivable financing that augments non-predatory and affordable chattel loans, OHCS and our partners can move the needle towards safe, healthy and sustainable homeownership for those who have traditionally been shut out of the market.

Demographic data for manufactured homeowners statewide exists, however, that data has not been disaggregated to accurately reflect the race and ethnicity of residents in resident-owned and nonprofit-owned parks in Oregon. While the data shows that an overwhelming majority of manufactured homeowners statewide are white (88%), we know anecdotally that of the 25 manufactured housing parks that have been preserved through resident or nonprofit ownership, three of them are home to a majority of Latinx households. Currently, affordable housing partners working in manufactured housing preservation collect limited data on race



and ethnicity in preserved parks, which creates a challenge for establishing a baseline for measuring impact.

Approved lenders will be expected to sign a Diversity, Equity, and Inclusion agreement and will be required to include an OHCS-approved survey for borrowers at the end of their loan application materials in order to help us gather data and evaluate impact. We will expect partners who participate in this program to demonstrate efforts to serve BIPOC (Black, Indigenous and People of Color) households and conduct culturally appropriate marketing and outreach to manufactured homeowners in eligible manufactured housing parks. Additionally, we will work with OHCS research staff to identify manufactured dwelling parks located on tribal lands in order to facilitate marketing and outreach.

**Feedback Requested from Housing Stability Council Members:**

- Legislation does not allow income limits to exceed the greater of 100 percent of the statewide or local area median income, but gives Housing Stability Council the ability to set lower limits if necessary. Staff recommends setting income limits at 100 percent of statewide/local area median income in order to increase potential eligibility, but are seeking feedback on this recommendation.
- After internal and external discussions, staff recommends that, at this time, we do not specify an upper limit on the age of home that would qualify for replacement. Because this is a pilot program, we would like to provide some flexibility around replacement eligibility so that it is based on condition of the home, rather than an arbitrary age. We will work with partners to determine some appropriate benchmarks, and plan to incorporate lessons learned throughout the pilot. We welcome feedback on this recommendation.
- Legislation states that Housing Stability Council may establish priorities for the evaluation of decommissioning grant applications and shall consider prioritizing grant awards:
  - (a) For the safe remediation of dwellings with environmental and public health hazards and risks, including asbestos, lead paint and mold;
  - (b) To owners from low-income households; and
  - (c) For the decommissioning of manufactured dwellings that are older and less resource and energy efficient.

Is this acceptable to Councilmembers?

- Are there other partners/stakeholders we may have missed?





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**Date** August 7, 2020

**To:** Housing Stability Council  
Margaret Solle Salazar, Director

**From:** Alan Borges – Production Analyst  
Casey Baumann – Production Manager  
Roberto Franco – Assistant Director, Development Resources and Production  
Julie V. Cody – Director, Affordable Rental Housing

**RE: Hilltop Ranchito Cooperative MDPP GHAP Funding Request**

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**MOTION: Move to approve MDPP GHAP funds in an amount up to and not to exceed \$1,260,000 to Hilltop Ranchito Cooperative for purchase of Mobile Home Park, subject to the borrower meeting OHCS and NOAH's underwriting and closing criteria, documentation.**

**Overview and Location:**

The property is a manufactured home park located at 5918 SE 122<sup>nd</sup> Ave, Portland, OR. Built in 1965 on 1.93-acres the manufactured home park consist of 28 spaces situated around a "U" shape road. The MDPP GHAP funds provided will be used to purchase the park.



South entrance to the subject site from 122<sup>nd</sup> Avenue



North entrance to the subject site from 122<sup>nd</sup> Avenue

**Funding History:**

There is no previous funding with the mobile home park.



**Funding Context:**

The project is using MDPP GHAP funding. The project will also consist of OAHTC's. MDPP GHAP funding provided by OHCS will be used to purchase the park for the Hilltop Ranchito Mobile Home Park Cooperative.

**Project Sponsor and Partnership:**

The consultant CASA of Oregon has completed over 1,000 housing units throughout the State of Oregon with over 30 years of history. The Board of Directors provides leadership, direction and helps local organizations provide housing for marginalized populations. While focusing on those who are often unable to advocate for themselves, CASA of Oregon is positioned as a liaison to the community with government, industry and community organizations.

Previous CASA of Oregon projects with OHCS have been in Winston Oregon, Warrenton Oregon and Estacada Oregon helping over 175 residents, preserving mobile home parks.

**General Contractor:**

N/A, this project is using MDPP Grant Funds to only purchase the park.

**Management Agent:**

N/A, this project is using MDPP Grant Funds to only purchase the park, the cooperative will manage their own park.

**Policy Priorities:**

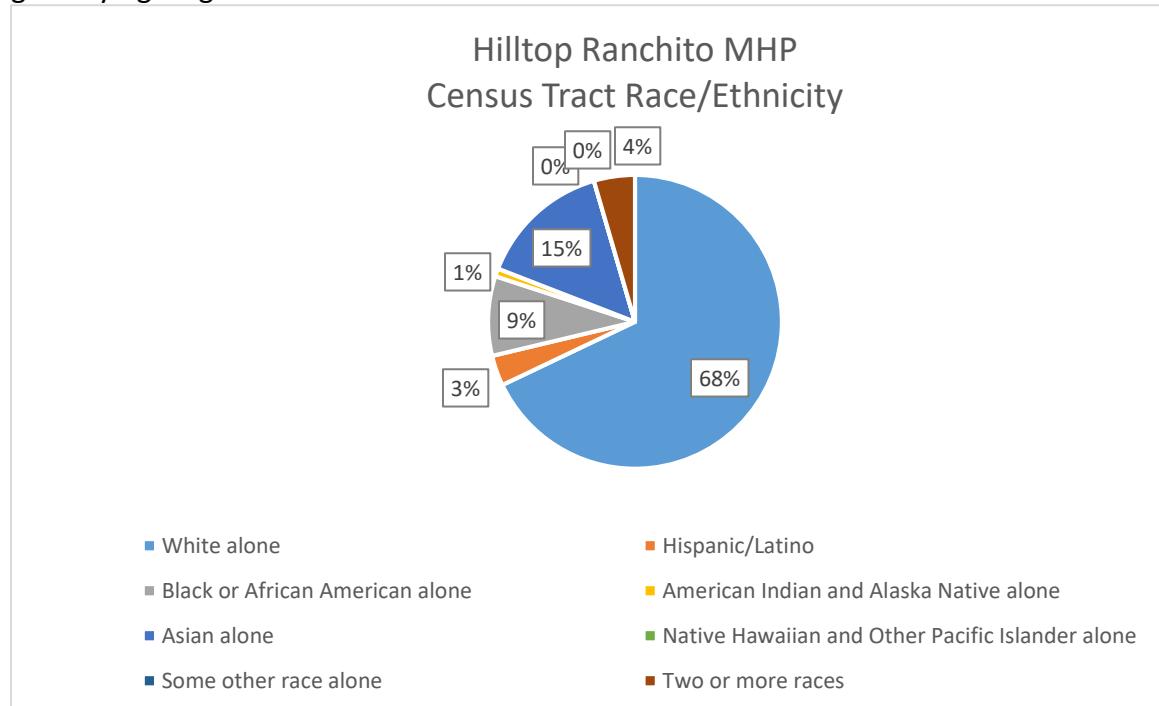
The Hilltop Ranchito Mobile Home Park aligns with one key OHCS priority as outlined in the statewide housing plan. Preserving the park will provide affordable homeownership opportunities in a region of Portland where the median single-family home price is \$427,000.

**• Equity and Racial Justice Priority:**

- **Community Demographics:** fundamental to understanding the impact of this project in the community is to understand the composition of the community. Hilltop Ranchito Mobile Home Park is a manufactured home park preservation project located in SE Portland, with 28 spaces.

Hilltop Ranchito is located in a census tract with a racial and ethnic composition that consists of 32.1% people of color, of whom 45.5% identify as Asian (58.8% Vietnamese, 12.4% Chinese, 6.7% Filipino, and 20.6% Other Asian), 27.3% identify as Black or African American, and 14.1% identify as Multiracial (35.4% Asian and White, 28.0% American Indian/Alaska Native and White, and 23.2%

Black/African American and White). This is a diverse community with many different communities of color residing in it, which makes the preservation of affordable housing options crucial to combating potential displacement in a gentrifying neighborhood.



- **Affirmative Fair Housing Marketing Strategies:**
  - N/A, this project is using MDPP Grant Funds to only purchase the park
- **Resident Services:** CASA of Oregon will provide technical assistance, ongoing training and support for all cooperative members through dedicated staff, educational resources and an annual collaborative training event where manufactured housing cooperatives in Oregon and Washington gather to provide peer-to-peer support and share lessons learned.
- **Contracting, Diversity, Equity & Inclusion**
  - N/A, this project is using MDPP Grant Funds to only purchase the park
- **Homelessness Priority**
  - N/A, this project is using MDPP Grant funds to only purchase the park
- **Permanent Supportive Housing Priority**
  - N/A, this project is using MDPP Grant funds to only purchase the park
- **Affordable Rental Housing Priority**
  - All current residents are at or below 80% AMI
- **Homeownership Priority**

- All members of the cooperative own their own homes. The purchase of the park using MDPP GHAP funds will preserve the park allowing homeowners to remain in their homes
- **Rural Communities Priority**
  - N/A, this project is not in a rural community

**The pages that follow will provide more technical details on the proposed project.**



### Project Detail: Hilltop Ranchito Cooperative

**Project Sponsor:** Hilltop Ranchito Cooperative

**Property:** Hilltop Ranchito Mobile Home Park  
5918 SE 122<sup>nd</sup> Ave  
Portland, OR 97266

**Owner:** Hilltop Ranchito Cooperative

**Description:** Mobile home park with 28 spaces situated on a 1.93 acre lot

**Affordability:**

Funding Source	Spaces	% Income	# Years
MDPP GHAP	28	80% AMI	60

**Target Population:** Families at or below 80% AMI

**Environmental Review:** A Phase I report review has been completed, the assessment has revealed no evidence of recognized environmental conditions in connection with the subject property. Partner recommend no further action at the subject property.

**Finance Committee Approval:** OHCS Finance Committee Reviewed and Approved this Project to be Recommended to the OHCS Director and the Housing Stability Council on July 29, 2020

#### Summary:

The property is a manufactured home park located at 5918 SE 122<sup>nd</sup> Ave, Portland, OR. Built in 1965 on 1.93-acres the manufactured home park consist of 28 situated around a "U" shape road. The MDPP GHAP funds provided will be used to purchase the park.

Residents of the park own their own homes individually and the park collectively. The Cooperative will have technical assistance from CASA of Oregon on how to operate their business, given the laws, rules and contracts they agreed to. The homeowners will also have access to basic outlines of park rules like shared decision making, and controlled monthly rent.



Members of the Cooperative will annually elect a board of directors who will have the primary responsibility of operating the park. The board will establish committees to address the needs the Cooperative, if any member has a specific need, the board will refer them to the appropriate service within the larger community or utilize one of the several resources CASA of Oregon has provided.

**Financing Structure:**

**Construction Lender:** N/A, this project is using MDPP Grant Funds to only purchase the park

**Permanent Lender:** NOAH

**General Contractor:** N/A, this project is using MDPP Gran Funds to only purchase the park

**Equity Investor:** N/A, this project is using MDPP Grant Funds to only purchase the park

<b>SOURCES</b>		<b>USES:</b>	
<b>OHCS Sources:</b>			
MDPP GHAP Grant	1,260,000		
		Acquisition	2,032,709
		Development	633,993
<b>Non-OHCS Sources:</b>			
NOAH w/OAHTC	1,175,000		
CASA of Oregon	230,000		
Cash	1,702		
	<b>TOTALS: \$2,666,702</b>		

**Bond Structure:**

N/A, this project is using MDPP Grant Funds to only purchase the park

**Scope of Work:**

N/A, this project is using MDPP Grant Funds to only purchase the park

**Project Schedule:**

Closing is targeted for August 30, 2020

**Developer Fee:**

Total Developer fee: \$85,000; 15.48% of total project costs. This is below the OHCS maximum of 22%.

- Cash Developer fee: \$85,000

**Tenant Relocation:**

N/A, this project is using MDPP Grant Funds to only purchase the park, homeowners are currently residing in the project

**Affordability Restrictions:**

# of Spaces	Income AMI%	Rent AMI %
28	80%	80%

**Operating Expenses:**

Operating expenses are \$2,861. The operating expenses are within OHCS guidelines as they are comparable to other mobile home sites.

**Debt Coverage Ratio:**

Year 1 Primary DCR is 1.11, however this is a rising DCR and eventually maintains an acceptable DCR throughout 30 years

DCR at first full year of operations: 1.11

DCR at year 20: 1.28

DCR at year 30: 1.61

**Location Amenities:**

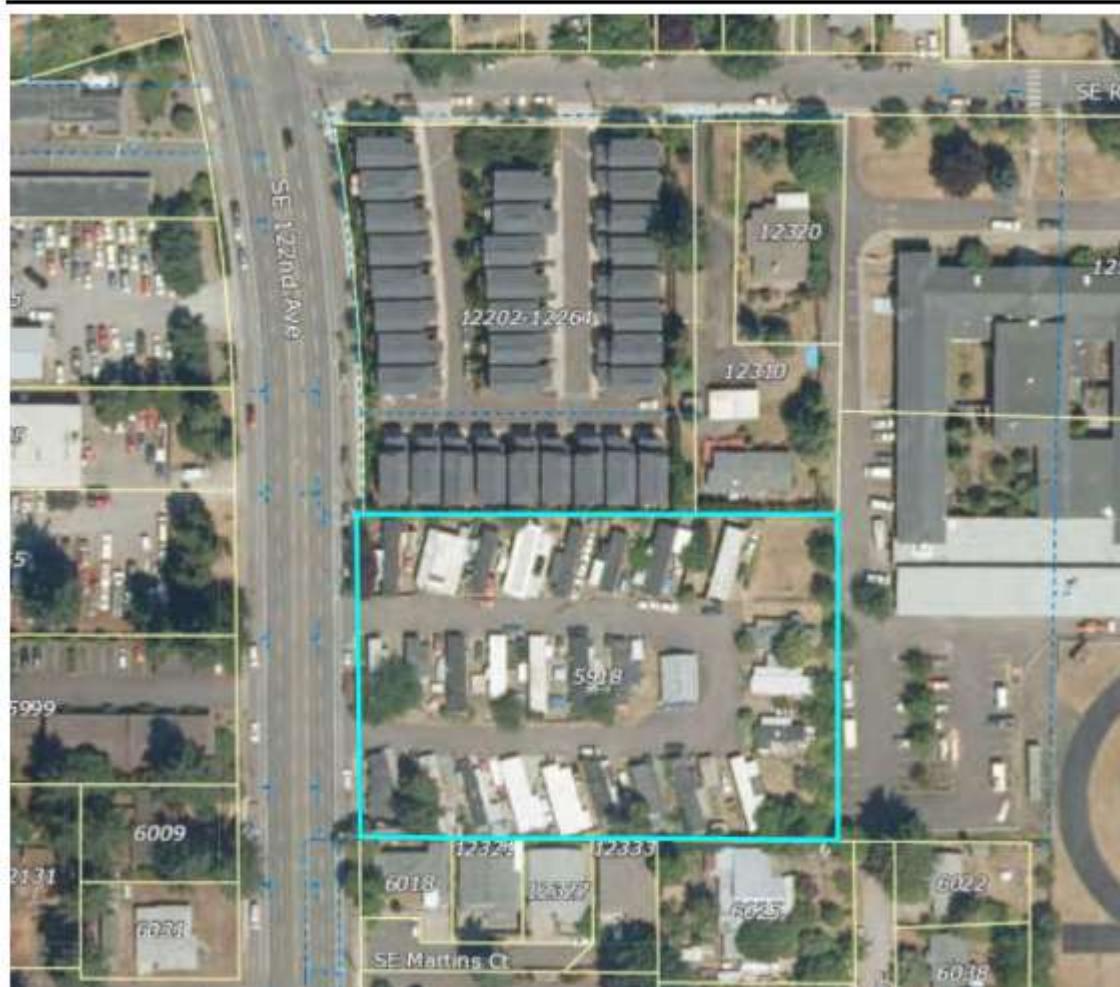
- Grocery Outlet – 1.8 mi
- Elementary School – 1.5 mi
- Middle School - .03 mi
- High School – 3.2 mi
- Gilbert Primary Park – 0.7 mi
- East Ridge Park – 2.3 mi
- Police – 3.3 mi
- Fire – 2.4 mi

**Resident Services:**

CASA will provide post purchase technical assistance ongoing training and support all Cooperative members through dedicated staff, educational resources and an annual collaborative training event where manufactured housing cooperatives in Oregon and Washington gather to provide peer-to-peer support and share lessons learned.

- **Financial Coaching:** One on one financial coaching to help residents achieve financial goals. Financial coaches empowers people to take important steps to get in control of finances and plan for a sound financial future

#### AERIAL PHOTOGRAPH





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Date August 7, 2020

To: Housing Stability Council  
Margaret Solle Salazar, Director

From: Tyler Young – Production Analyst  
Casey Baumann – Production Manager  
Roberto Franco – Assistant Director, Development Resources and Production  
Julie V. Cody – Director of Affordable Rental Housing

RE: **Stillwater Crossing Apartments**

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**MOTION: Move to approve Pass-Through Revenue Bond in an amount up to and not to exceed \$35,000,000 to Stillwater Housing Associates Limited Partnership for the new construction of the project known as Stillwater Crossing Apartments, subject to the borrower meeting OHCS and Citi Community Capital's underwriting and closing criteria, documentation satisfactory to legal counsel and State Treasurer approval of the bond sale.**

**Overview and Location:**

Stillwater Crossing Apartments is a new construction project located in Southwest Bend. The site consists of three parcels, totaling 8.57 acres. There will be nine buildings, which includes seven residential buildings, one community building, and one dog/bike building. This project will provide 240 units, including 42 one-bedrooms, 170 two-bedrooms, and 28 three-bedroom units.

**Bird's Eye View**



August 7, 2020

## Stillwater Crossing Apartments

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### **Population Served:**

The population served will be families and individuals earning 60% of the Area Median Income (AMI) and below.

### **Funding Context:**

This project uses non-competitive 4% LIHTC and Tax-Exempt Conduit Bond resources, which require the developer to comply with federal regulations and requirements.

### **Project Sponsor:**

The sponsor is Wishcamper Development Partners LLC (WDP). The principals of WDP have ownership in, and are principals of, their sister company, Wishrock and Ray. Combined, WDP have over 80 years of experience across 23 states; having developed or redeveloped over 15,000 units of affordable housing since the early 1970's.

### **Management Agent:**

Guardian Real Estate Services (GRES) will be providing the Project's property management and tenanting services. GRES has been providing property management services to the region for over 40 years and has extensive experience managing both market rate and affordable projects. GRES manages over 120 income-restricted projects and over 4,700 units throughout Oregon, Washington, and Arizona.

With over 400 employees, GRES has 26.5% of employees self-identifying as a member of an ethnic minority, 56% of their workforce is female. Contributions of senior executives has played an important role in the development of a college preparatory education program that affords primarily minority and lower-income high school students' access to high quality education and a conduit to post-secondary studies. GRES takes pride in the demographic of their employment and their residents. GRES will employ Affirmatively Furthering Fair Housing strategies in the management and leasing of the property.

### **Resident Services:**

Provider: Cornerstone Community Housing: (Mission) Since 1992 Cornerstone Community Housing has been committed to building quality, affordable housing for people living on limited incomes while offering services that promote opportunities for personal growth and economic independence.

Provider: Thrive Central Oregon: (Mission) We help prevent housing and financial insecurity in our community by utilizing a holistic approach that connects families and individuals to the resources they need.

The following services will be offered:

- Food & Nutrition:
  - Extra Helping: On-site delivery of fresh produce, bread, and dairy.
  - Summer Cereal/Lunch: Feeds youth during summer months.
  - Bread Basket: Fresh bread offered on-site.
  - Senior Grocer: Delivery of groceries to seniors.
- Health & Wellness:
  - Get Motivated: Links adult residents to health and wellness services.
  - Taste of Wellness: On-site visits from local health organizations such as YMCA and PeaceHealth.
  - Wellness Coaching: One-on-one wellness support and coaching helps resident achieve health goals and manage chronic illness.
- Youth Development:
  - Active Kids: Offers education, movement, and art programs.
  - Active Teens: Recreational activities.
  - Rising Star: Motivates youth to excel in school and life through reward incentives.
  - Homework Club: Kids' complete homework while having a healthy snack in a safe setting.
- Financial Stability:
  - Resident Referrals: One-on-one help connects residents to local resources.
  - Saving Programs: Teaching the basics of budgeting and saving.
  - Financial Wellness: Connection to financial institutions to promote financial growth.
- Community Development:
  - Volunteerism: Opportunities for community members to support resident programs.
  - Symphony Connects: A collaboration with local symphonies to bring music on-site.
- On-site 3 days a week: Available to both residents and the public during their visits. Connects residents in need with service provider networks for healthcare, health insurance, prescription drugs, navigating insurance claims, legal services, credit counseling, domestic abuse, drug and alcohol abuse, depression, childcare, employment and job training and placement opportunities, eviction prevention, and education.

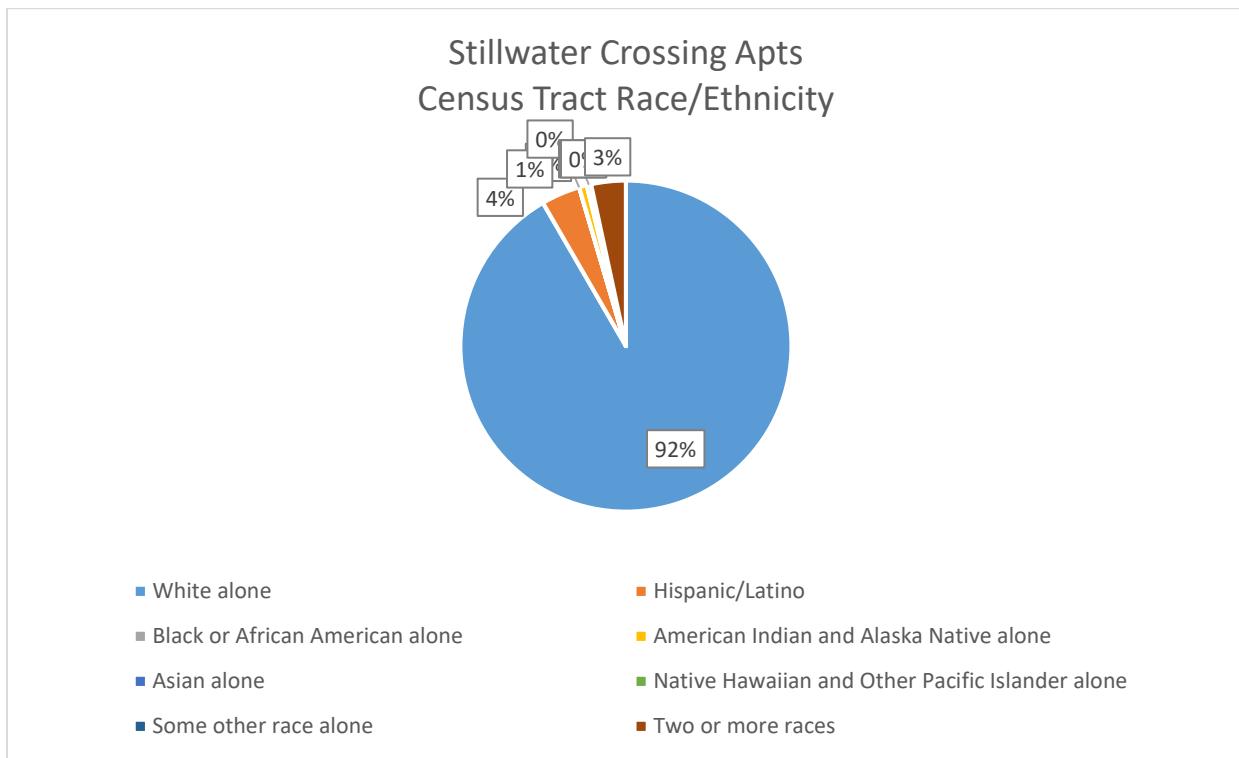
**OHCS Policy Priorities:**

This project meets key OHCS policy priorities as outlined in the Statewide Housing Plan.

- **Equity and Racial Justice:**

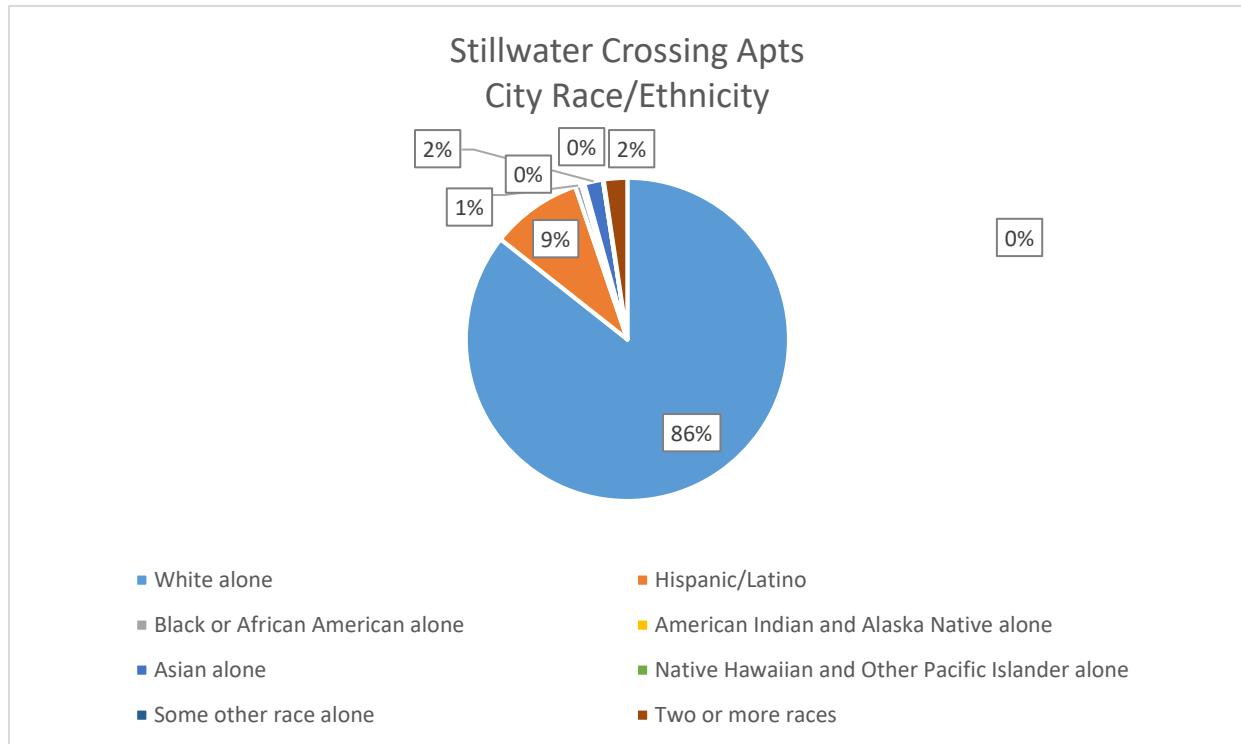
Community Demographics:

Stillwater Crossing Apartments is located in a census tract in Bend, which has been identified as an area of opportunity using the metrics from the most recent 9% LIHTC NOFA. This is a result of its higher percentage of owner-occupied units (74.8%), its high labor market engagement score (72 out of 100), and its high median household income (38% greater) when compared to other similar census tracts. The current racial and ethnic composition of the census tract consists of 8.4% people of color, of whom 45.4% identify as Latino (31.1% Mexican, 6.8% Cuban, and 62.1% Other Hispanic/Latino), 40.4% identify as multiracial (75.1% American Indian/Alaska Native and White, and 19.2% Asian and White), and 9.0% identify as American Indian and/or Alaska Native.



Compared to the city as a whole, this census tract is disproportionately White. The city of Bend is comprised of 14.4% people of color. The city's racial breakdown looks significantly different too. 63.6% of Bend's people of color identify as Hispanic/Latino, 83% of whom are Mexican. The Asian population makes up 13% of the people of color citywide and is diverse, with 19.7% identifying as Chinese, 14.9% as Korean, 13.9% as Indian, 13.4% as Filipino, 11.4% as Japanese, and 25.9% as other Asian. In the census tract of Stillwater Crossing, the Asian population makes up just 5.1% of the people of color, and 100% of that population identifies as Indian. These disparities suggest that

communities of color have had difficulties accessing this neighborhood, in particular the Mexican and non-Indian Asian communities of Bend. This large affordable housing project with a varied unit mix will ideally open up the ability for more people of color to move into and take advantage of this opportunity area within their city.



#### Affirmative Fair Housing Marketing Strategies:

In order to ensure access by under-represented populations and communities of color, Guardian has a clear mandate to selectively override screening criteria that serve as a barrier to entry. In addition, they will maintain relationships with local community action organizations to assist residents in crisis and prevent eviction. Further, they will take efforts to ensure on-site management and staff need to understand the goals of, and be representative of, the community they serve. Effort will be taken to hire on-site staff that are racially and culturally representative of the resident community. The on-site management and staff receive diversity, equity, and inclusion training as an ongoing, developmental process to support their professional development.

At the core of all leasing activities is a commitment to furthering fair housing. Several strategies will be employed at the project to provide equitable access to marginalized communities, including targeted outreach to priority populations at lease-up,

linguistically appropriate materials, and translation services that reflect community demographics.

**Outreach Platforms:**

- The Latino Community Association: This organization can help provide inroads into the local Latino community.
- El Latino De Hoy: (Weekly Newspaper)
- Local Cultural Consultants
- Social Media Management (Union Culture, Bend OR)
- KRDM Radio (Regional Mexican Radio, Redmond OR)
- Promo Materials available at various locations such as Volunteers in Medicine, Family University, and Plaza Comunitaria

**Marketing Beyond Lease-Up:**

- Management will keep the cultural consultants on retainer
- Outreach, Services, and the Management Team will meet twice a year to evaluate if marketing needs to be refreshed, augmented, or changed.

**Contracting, Diversity, Equity & Inclusion:**

This project will exceed 20% MWESB participation with an aspiring goal to reach 30% participation for both professional services and contracting. Below describes the outreach efforts to MWESB sub-contractors to ensure significant participation for this project.

- *Trade Associations:* The construction team presented the project at trade association group meetings, including Professional Business Development Group, LatinoBuilt, National Association of Minority Contractors, and Oregon Association of Minority Entrepreneurs.
- *Direct Contact:* CDK contacted all applicable companies that are COBID-registered. PBDG analyzed work scopes to match opportunities to MWESB firm's experience.
- *Pre-Bid Outreach Meetings:* Consultants hosted two pre-bid outreach meetings to provide interested sub-contractors the opportunity to learn more about the project, the bid deadline, and answer specific questions.

WDP has engaged Professional Business Development Group ("PBDG") as the official MWESB Coordinator and to provide a Mentorship Program for successful subs. WDP and PBDG have contacted over 292 subs. PBDG's role is expansive and includes key elements of outreach, bid review and assistance, reporting, and training. WDP's construction process augments the work of PBDG and furthers MWESB participation. WDP procures the bulk of a project's materials and begins soliciting estimates from

subcontractors much earlier in the process than is typical to ensure the cost of the development is continually and reliably updated with costing from subs, not the architect, engineer, or developer.

- **Homelessness:** N/A
- **Permanent Supportive Housing:** N/A
- **Affordable Rental Housing:** Provides 240 new units of affordable housing
- **Homeownership:** N/A
- **Rural Communities:** N/A

**Risks and Mitigating Factors:**

This development conforms to all OHCS underwriting standards. The primary risk is with the current unknown environment relating to COVID-19 and whether it will affect the construction period or delay any material deliveries necessary for the project. Enough contingency was built into the budget to mitigate delays.

**The pages that follow will provide more technical details on the proposed project.**



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### Project Detail: Stillwater Crossing Apartments

**Project Sponsors:** Wishcamper Development Partners

**Property:** Stillwater Crossing Apartments  
60885 Highway 97  
Bend, Oregon 97702

**Owner:** Stillwater Housing Associates Limited Partnership

**Description:** This is a new construction project located in the Southwest Bend neighborhood of Bend. It will consist of nine buildings with 240 units comprised of 42 one-bedrooms, 170 two-bedrooms, and 28 three-bedroom units.

**Affordability:**

Funding Source	# Units	% Income	% Rents	# Years
LIHTC/BOND	240	60	60	30

**Target Population:** Families and individuals at or below 60% AMI.

**Environmental Review:** A Phase I ESA was completed in July 2020. This assessment identified no evidence of recognized environmental conditions at the subject property.

**Finance Committee Approval:** OHCS Finance Committee reviewed and approved this Project to be recommended to the OHCS Director and the Housing Stability Council on July 28, 2020.

**Summary:**

Stillwater Crossing Apartments is a new construction project, located at the intersection of Ponderosa Street and Highway 97. The site consists of three parcels, totaling 8.57 acres. There will be nine buildings, which includes seven residential buildings, one clubhouse, and one dog/bike building. Project amenities will include a fitness center, community room, on-site management, conference room, community BBQ area, pet



grooming/dog wash area, playground, community gardens, and a splash deck. This project will provide 240 units, including 42 one-bedrooms, 170 two-bedrooms, and 28 three-bedroom units. There will be 297 surface parking spaces with a parking ratio of 1.24, while code only required 240 or 1.00 ratio.

#### **Financing Structure and Partners**

**Management Agent:** Guardian Real Estate Services

**Architect:** Encompass Design Inc.

**General Contractor:** Headwaters Construction LLC

**Construction Lender:** Citi Community Capital

**Permanent Lender:** Citi Community Capital

**Syndicator/Investor:** Boston Financial Investment Management

#### **Project Financing:**

<b>SOURCES:</b>		<b>USES:</b>	
<b>OHCS Sources:</b>			
Tax Exempt Bonds (Long Term)	\$34,577,608	Acquisition	\$3,586,127
Tax Exempt Bonds (Short Term)	\$422,392	Construction	\$34,094,703
Short Term Use of Bonds	(\$422,392)	Development	\$14,179,339
4% LIHTC Equity	\$12,107,191		
<b>Non-OHCS Sources:</b>			
Deferred Development Fee	\$4,775,370		
Bend Affordable Housing Funds	\$400,000		

**TOTAL Sources and Uses: \$51,860,169**

#### **Bond Structure:**

The total tax-exempt conduit bond amount is \$35,000,000, of which \$422,392 will be short-term only, used for the construction of the project

This request exceeds our 55% cap policy on tax exempt bonds by roughly 20% or \$9,000,000. On June 23, 2020, Finance Committee was supportive of this request in an effort to help save 240 new affordable units based on the following considerations.

- A pre-app was submitted in early February 2020, before the COVID-19 pandemic.
- Post COVID-19, this project was negatively affected in a variety of ways:

- Land Purchase: This was delayed due to the overall uncertainty in the market. This delay with the seller added additional interest costs by \$433,636. The sponsor purchased the land on July 27, 2020.
- Permanent loan reduced: The lender originally sized the loan based 2021 projected rents with a 55% cap on tax exempt bonds plus a taxable tail. The following changes are due to COVID-19 regarding the perm loan underwriting.
  - Lender sized the perm loan based on 2020 rents
  - Lender spread increased
  - If this exception is not allowed, there would be a financing gap of approximately \$2,500,000.
- Investor/LIHTC Equity: Lower applicable percentage rate (3.17% to 3.07%) resulted in approximately \$400,000 loss of equity.
- Sponsor Actions:
  - Increased deferred developer fee by about \$1,000,000 or as a percentage of the total fee from 67% to 85%.
  - Reduced 14 three-bedroom units down to two-bedroom units, in order to reduce construction costs, which saved approximately \$400,000.
  - Capitalizing LIHTC/bond monitoring fees and resident services in order to reduce operating expenses, which helps increase the perm loan.
  - Sponsor went back to the City of Bend and request additional funds by \$750,000. (\$400,000 committed; \$750,000 pending approval).
  - Sponsor has reevaluated energy efficiency appliances in order to receive an estimated \$200,000 in Oregon Multifamily Energy Program funds. A reservation is pending.

**Scope of Work:** N/A – New Construction

**Developer Fee:**

Total Developer fee: \$5,635,753; 13.87% of total project costs less acquisition, developer fee and capitalized reserves. This is below the OHCS maximum of 14%

- Deferred Developer fees: \$4,775,370; deferred fee will be repaid within the first 13 years of operation
- Cash Developer fee: \$860,383

**Tenant Relocation:** N/A – New Construction

**Operating Budget:**

- All 240 units will be restricted to 60% AMI or below for 30 years per LIHTC restrictions.
- The annual operating expenses of \$3,567/unit are acceptable to OHCS. These expenses are supported by the appraisal.

**Debt Service Coverage Ratio:**

- First full year of operations: 1.18
- DCR at year 15: 1.45
- DCR at year 20: 1.56
- DCR at year 30: 1.78

**Project Schedule:**

- Target construction close date: September 10, 2020
- Construction completion: April 2022
- Construction period anticipated to be 19 months

**Location Amenities:**

The southern portion of the subject site is located at the intersection of Ponderosa Street and Highway 97. Atwood Drive bisects the southern and northern portion of the property and runs along the eastern boundary of the northern parcels. It has an address of 60885 Highway 97, Bend, Oregon.

The following location amenities are:

- |                |           |                       |           |
|----------------|-----------|-----------------------|-----------|
| • Bus Stop     | <1 mile   | • Commercial Services | 3.5 miles |
| • Fire Station | 1.5 miles | • Employment Centers  | 3.5 miles |
| • Elementary   | 2.0 miles | • Middle/High School  | 5.0 miles |
| • Parks        | 2.0 miles | • Police Station      | 6.0 miles |

**Project Amenities:**

- |                              |                             |
|------------------------------|-----------------------------|
| • Community Room             | • Controlled-access entry   |
| • Splash deck                | • Conference room           |
| • Community gardens          | • On-site leasing office    |
| • Pet grooming/Dog wash area | • Fitness center            |
| • Playground                 | • Bike/ski maintenance room |

**Unit Amenities:**

- |                       |                    |
|-----------------------|--------------------|
| • Electric range/oven | • Garbage disposal |
| • Vent hood           | • Refrigerator     |

- Dishwasher
- Individual Unit Ventilation
- Vinyl Flooring
- Tub/shower w/ fiberglass surround
- Balcony or patio area

### Renderings



Clubhouse Rendering

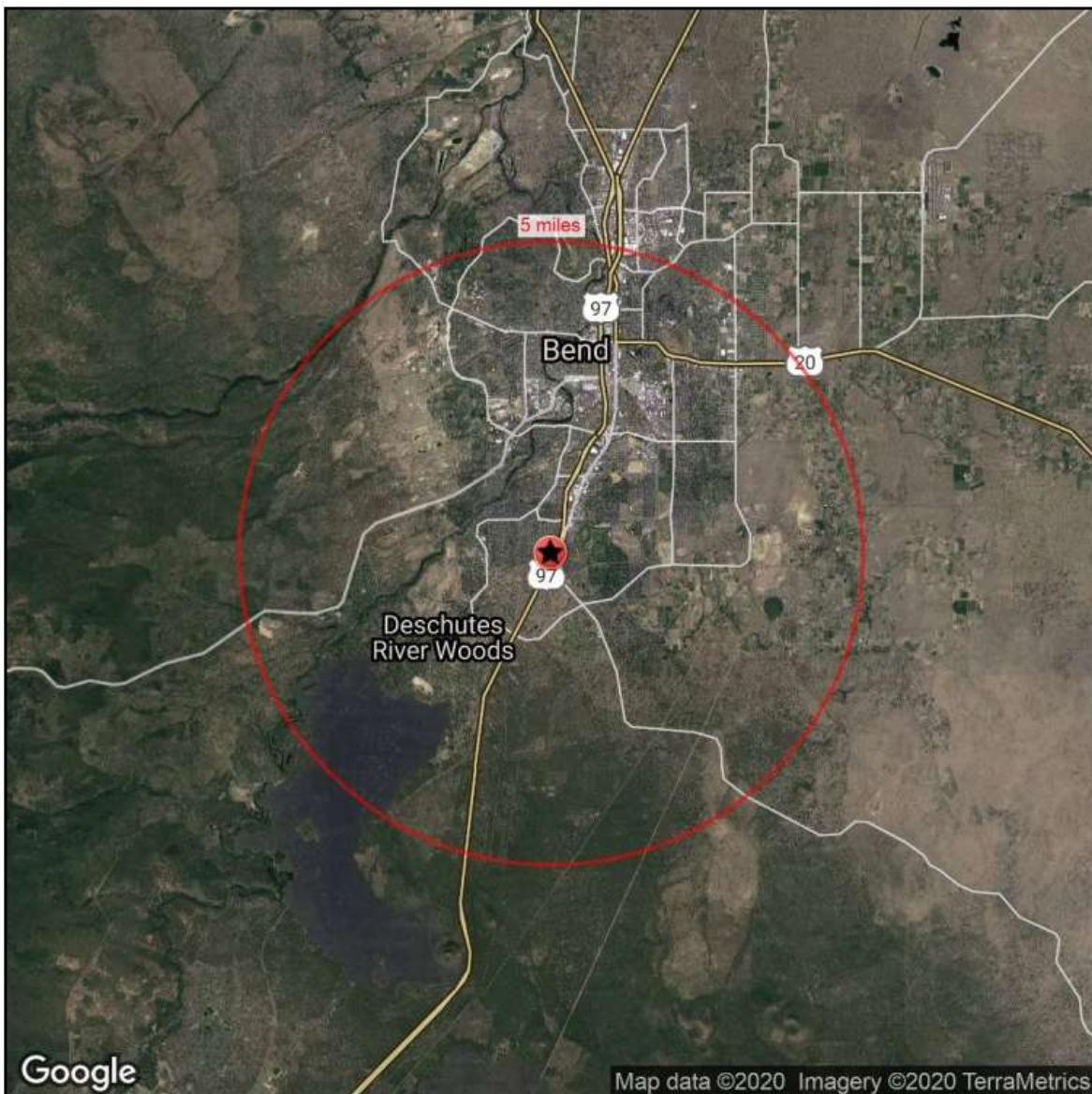
Apartment Building Rendering



Apartment Building Rendering

Apartment Building Rendering

**Subject's Primary Market Area**





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Date: August 7, 2020

To: Housing Stability Council Members;  
Margaret Solle Salazar, Executive Director

From: Tai Dunson-Strane, Senior LIHTC Program Manager  
Roberto Franco, Assistant Director, Development Resources and Production  
Natasha Detweiler-Daby, Assistant Director, ARH Planning and Policy  
Julie V. Cody, Director, Affordable Rental Housing Division

Re: 2020 Preservation, HOME only, and 9% LIHTC NOFA Project Recommendations

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**Motion: Approve the funding reservation of the following resources:**

- Nyssa Court in Nyssa, \$1,150,000 in Gap (GHAP/HDGP)
- Ankeny Woods in Portland, \$3,800,000 in Gap (GHAP/HDGP), and \$68,460 OMEP funds
- Garden Grove in Grants Pass, \$5,000,000 in Gap (GHAP/HDGP) funds, and \$126,455 OMEP funds
- Grand Apartments in Roseburg, \$200,000 in Gap (GHAP/HDGP), and \$1,435,000 in HOME or Gap funds
- Hillside Terrace Apartments in Coquille, \$200,000 in Gap (GHAP/HDGP), \$2,200,000 in HOME or Gap, and \$122,973 OMEP funds
- Freedom Square II in White City, \$200,000 in Gap (GHAP/HDGP), \$900,000 in HOME or Gap funds
- Chelsea Gardens in Warrenton, \$200,000 in Gap (GHAP/HDGP), \$1,977,436 in HOME or Gap, and \$136,960 OMEP funds
- Ontario Affordable Housing in Ontario, \$200,000 in Gap (GHAP/HDGP), and \$3,482,202 in HOME or Gap funds
- Canal Commons 2 in Bend, \$200,000 in Gap (GHAP/HDGP), \$2,100,000 in HOME or Gap, and \$218,459 OMEP funds
- Spring Garden Apartment in Rogue River, \$200,000 in Gap (GHAP/HDGP), \$600,000 in HOME or Gap, and \$138,268 in OMEP funds
- East West Preservation Portfolio, \$199,633 in Gap (GHAP/HDGP), \$932,761 in HOME or Gap, and \$50,609 OMEP funds

At the upcoming Housing Stability Council (HSC) meeting, we will be presenting and requesting HSC approval of the funding recommendations from three recent Notices of Funding Availability (NOFA): Preservation, HOME only and 9% LIHTC. These project recommendations



are based on the policies laid out in the HSC adopted program frameworks, including the 2019 Qualified Allocation Plan (QAP). In this memo, we are providing you with a high level summary of the NOFA outcomes and provide more detail on each project in the one-page summaries following this cover memo. We will provide a more detailed analysis of the NOFA policy direction and outcomes during the Housing Stability Council meeting.

**Motion Overview:**

In the above motion, we are asking Housing Stability Council to approve the reservation of resources consistent with established Oregon Administrative Rules<sup>1</sup> in cases where the state loan and grant investment is equal to or greater than \$1,000,000, more than half of a total development budget, or outside agency policy standards<sup>2</sup>. In addition, HUD sources such as Federal HOME funds require visibility and are called out in motions. Housing Stability Council does not have approval authority over tax credit program resources, such as the 9% LIHTC and OAHTCs so those resources are not included in the above motion.

We are asking Housing Stability Council to approve the reservation of the OHCS loan and grant resources that meet the established guidelines. Given that projects apply for resources early on in the development process, we are not able to provide more detail on final finance structures other than to confirm that they will fall within established financial policies and practices as documented in the OHCS Qualified Allocation Plan, General Guidelines Manual, and Program Manuals.

**NOFA Applications & Scoring:**

All three of these NOFAs were released on February 13, 2020. Responses to all NOFAs were originally due April 24, 2020 but were extended in response to COVID-19 twice to end with a revised due date of June 1, 2020. As in the past, all applicants were required to describe their approach to soliciting and using MWESB contractors and were required to sign an organizational diversity, equity, and inclusion (DEI) agreement as part of the application process. Point scoring further served to preference, across NOFAs, serving lower income

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<sup>1</sup> <https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=239530>

<sup>2</sup> Please note that five projects, (Alberta Alive, Harvey Rice Heritage, 1100 Charnelton, Aldercrest Apartments and WS LIHTC #2) were not included in the above motion because the gap fund requests did not meet the minimum threshold or for requiring Housing Stability Council approval or proposal just included a LIHTC funding request.



households, incorporating culturally responsive partnerships, and maintaining proactive affirmative fair housing marketing strategies.

**Preservation:** The Preservation NOFA was released with an offering of \$10 million in Gap Funds, and \$10 million in OAHTCs loan requests. Applicants were also encouraged to leverage non-competitive 4% Low Income Housing Tax Credits (LIHTC).

- OHCS received 3 proposals with cumulative requests of \$779,345 in 4% federal tax credits funding, \$1,260,000 in OAHTC loan request and \$9.95 million in Gap funding for 108 units.

**HOME only:** The HOME NOFA was released with an offering of \$7 million in federal HOME funds (split between the HOME and LIHTC NOFA), \$2 million in OAHTCs loan requests and \$2 million in Gap funds. HOME resources can be used in the HUD-HOME Balance of State, outside of the Portland Metro counties, Salem / Keizer and Springfield / Eugene.

- OHCS received 3 proposals with cumulative requests of \$5.035 million in HOME funds, no requests for OAHTC loans and \$600,000 in Gap funding for 86 units.

**9% LIHTC and HOME:** The 9% LIHTC and HOME NOFA was with an offering of \$10 million in 9% federal tax credits, \$7 million in federal HOME funds (split between the HOME and LIHTC NOFA), \$10 million in OAHTCs loan requests and \$6 million in Gap funds.

- OHCS received 22 proposals, one project was removed from consideration after receiving a fund reservation from the LIFT Rental NOFA for the same project.
- The remaining 21 proposals had cumulative requests of \$28.6 million in 9% federal tax credits funding, \$13.09 million in federal HOME funds, \$32 million in OAHTC loan request and \$5.4 million in Gap funding for 1,156 units.

Applications were reviewed for completeness, and had to meet minimum threshold requirements in order qualify for scoring by internal scoring committees. All applications met threshold requirements and were scored.

#### **Funding Recommendation:**

Through the three NOFAs, we are recommending funding reservations for fifteen projects: three Preservation NOFA proposals, two HOME only NOFA proposals, and ten 9% LIHTC and HOME NOFA proposals. All together, these projects will create or preserve 802 units of affordable rental housing in communities across the states; of which 116 are dedicated PSH units.



**August 7, 2020**

Preservation, HOME only, and 9% LIHTC & HOME NOFAs Project Recommendations

**Preservation Projects**

Project Name	County	Total Units	Sponsor
<b>Nyssa Court</b>	Malheur	7	Housing Authority of Malheur & Harney Counties
<b>Ankeny Woods</b>	Multnomah	41	Human Solutions
<b>Garden Grove</b>	Josephine	60	Chrisman Development
<b>Total</b>		<b>108</b>	

**HOME only Projects**

Project Name	County	Total Units	Sponsor
<b>Grand Apartments</b>	Douglas	37	NeighborWorks Umpqua
<b>Hillside Terrace</b>	Coos	39	NeighborWorks Umpqua
<b>Total</b>		<b>76</b>	

**9% LIHTC and HOME**

Project Name	County	Total Units	Sponsor
<b>Freedom Square II</b>	Jackson	49	Housing Authority of Jackson County
<b>Chelsea Gardens</b>	Clatsop	42	Northwest Oregon Housing Authority
<b>Ontario Affordable Housing</b>	Malheur	55	Northwest Housing Alternatives
<b>Canal Commons 2</b>	Deschutes	48	Pacific Crest Affordable Housing
<b>Alberta Alive*</b>	Multnomah	52	Community Development Partners
<b>Harvey Rice Heritage*</b>	Multnomah	41	Sabin CDC
<b>1100 Charnelton*</b>	Lane	45	Homes For Good
<b>WS LIHTC #2 *</b>	Jefferson	18	Warm Springs Housing Authority
<b>Spring Garden Apartments</b>	Jackson	108	Chrisman Development
<b>Aldercrest Apartments*</b>	Multnomah	68	Human Solutions
<b>East West Preservation Portfolio</b>	Douglas/ Jefferson/ Malheur	92	TimberRiver Development
<b>Total</b>		<b>618</b>	

See attached project summaries for additional information.



Making these recommendations does over-obligate our available HOME resources, and to a lesser degree our 9% LIHTC. At the same time, the NOFAs were under-subscribed in gap funding resources. As such, as reflected in the above motion, staff recommends replacing the HOME resources in a portion of the HOME projects (determined based on project timeline and resource consumption) with gap resources in order to maintain available HOME resource moving forward. While we have also over-subscribed the 9% LIHTC program, by fully obligating all 9% LIHTC resources, Oregon is able to access “national pool” resources; this national pool is the redistribution of all state unallocated resources, the amount fluctuates annually.

### **Policy Analysis:**

Each round of funding, we learn from the application, review and, scoring processes and use these lessons to further refine the processes for future fund offerings in order to better achieve policy priorities.

In this round of funding there were two major refinements made:

- **Updated QAP:** This was the first year the updated QAP applied to our application process; this QAP drove the scoring framework for both the 9% LIHTC and the HOME only NOFAs.
- **New Application:** Our application process was electronic for the first time; including an updated pro forma.

Both of these changes served to increase the objective measurements of scoring (moving away from essays to yes/no measures); and allowing us to better track project changes from application through construction.

### **Statewide Housing Plan**

With a focus on adding affordable rental units to the housing stock, specific scoring and funding set-aside for rural proposals, and the focus on creating housing opportunities for historically underserved populations, MWESB contracting, and Diversity Equity and Inclusion agreements, the Preservation, HOME, and 9% LIHTC and HOME programs and resulting housing meet the following Statewide Housing Plan priorities:

- **Affordable Rental Housing:** All funding offerings add new affordable rental units to the affordable housing stock or preserve critical stock in need of preservation. To drive the SWHP goal for serving families, the new construction projects prioritized through scoring the provision of family sized units.



- Permanent Supportive Housing: The LIHTC and HOME NOFAs actively incentivized, through points, the creation of permanent supportive housing units with related rent assistance and supportive services funds. This group of funding recommendations includes 116 units of PSH.
- Homelessness: As detailed in the project overviews many of the recommended projects are setting aside units to serve those experiencing homelessness.
- Rural Communities: 9% LIHTC and HOME offering has a geographic regional for rural developments.
- Homeownership: there are loose ties to homeownership in these recommendations, in that some of them would include partnership with organizations that could help connect tenants with homeownership readiness or IDA program efforts.
- Equity and Racial Justice: All funding offerings requires that all required to sign a diversity, equity, and inclusion agreement and have a plan to engage with MWESB organizations. 9% LIHTC and HOME proposals received point incentives for engaging culturally specific service providers in both their outreach and service delivery efforts. Point incentives were also made available to sponsors for providing a detailed and thoughtful analysis of populations and strategies beyond the basic Affirmative Fair Housing efforts.



## **Preservation NOFA Applicants**

Rec?	Project Name	City	County	Applicant	GHAP/ HDGP \$	HOME \$	OAHTC \$	OMEП \$	LIHTC4 \$	TYPE	Population	Total Units	PBA Units	Type of PBA
Yes	Nyssa Court	Nyssa	Malheur	HA of Malheur & Harney Cos	\$1,150,000	-	\$460,000	\$0		A R	FAM/WF	7	7	Sec 8 HAP
Yes	Ankeny Woods	Portland	Multnomah	Human Solutions	\$3,800,000	-	\$0	\$68,460	\$405,438	A R	FAM/WF	41	0	Existing LIHTC
Yes	Garden Grove	Grants Pass	Josephine	Chrisman Development	\$5,000,000	-	\$800,000	\$126,455	\$393,907	A R	FAM/WF	60	44	RD
												108	51	

**Preservation NOFA Recommended** \$9,950,000 - \$1,260,000 \$194,915 \$799,345

## **HOME only NOFA Applicants**

Rec?	Project Name	City	County	Applicant	GHAP/ HDGP \$	HOME \$	OAHTC \$	OMEП \$	LIHTC9 \$	TYPE	Population	Total Units	PBA Units	Type of PBA
Yes	Grand Apartments	Roseburg	Douglas	NeighborWorks Umpqua	\$200,000	\$1,435,000	\$0	\$0	-	A R	HOM	37	12	PSH OHA
Yes	Hillside Terrace Apartments	Coquille	Coos	NeighborWorks Umpqua	\$200,000	\$2,200,000	\$0	\$122,973	-	A R	FAM/WF	39	39	18 RD / 21 Sec 8 HAP
	Leisure Way Too	Wallowa	Wallowa	Chrisman Development	\$200,000	\$1,400,000	\$0	\$6,265	-	A R	SEN DIS	10	0	
												86	51	

**HOME only NOFA Recommended:**      \$400,000      \$3,635,000      \$0      \$122,973

## **9% LIHTC NOFA Applicants**

Rec?	Project Name	City	County	Applicant	GHPA/ HDGP \$	Home \$	OATC \$	OMEPA \$	LIHTC9 \$	Type	Population	Total Units	PBA Units	Type of PBA
<b>Balance Rural</b>														
Yes	Freedom Square II	White City	Jackson	HA of Jackson Co	\$200,000	\$900,000	\$0	\$0	\$1,127,136	NC	HOM	49	24	Local PBV; VASH
Yes	Chelsea Gardens	Warrenton	Clatsop	NWOHA	\$200,000	\$1,977,436	\$1,350,000	\$136,960	\$1,086,482	NC	FAM/WF	42	8	Local PBV
Yes	Ontario Affordable Housing	Ontario	Malheur	Northwest Housing Alternatives	\$200,000	\$3,482,202	\$950,000	\$0	\$1,327,500	AR	FAM/WF DIS (SPMI)	55	10	HUD 811
	25th Street Apartments	Lincoln City	Lincoln	Innovative Housing	\$200,000	\$1,800,625	\$1,351,615	\$15,978	\$2,000,000	NC	FAM/WF	80	0	
	Highland Vista Apartments	Grants Pass	Josephine	Cascade Housing Group LLC	\$200,000	\$800,000	\$0	\$0	\$999,999	NC	FAM/WF	37	22	Local PBV
	Valiant Oaks Senior Housing	Roseburg	Douglas	NeighborWorks Umpqua	\$400,000	\$0	\$3,000,000	\$97,937	\$1,185,000	NC	SEN DIS	40	40	Sec 8 HAP
	Meadowbrook I	John Day	Grant	NW Real Estate Capital Corp	\$130,708	\$0	\$0	\$0	\$306,485	AR	FAM/WF	24	24	RD
	Trinity Project	Ontario	Malheur	Greystone Builders LLC	\$0	\$0	\$0	\$0	\$1,955,000	NC	FAM/WF	44	0	
<b>Balance Urban</b>														
Yes	Canal Commons 2	Bend	Deschutes	Pacific Crest Aff Hsg	\$200,000	\$2,100,000	\$2,775,000	\$218,459	\$1,000,000	NC	FAM/WF	48	0	
<b>Metro</b>														
Yes	Alberta Alive (2 sites)	Portland	Multnomah	Community Dev Partners	\$400,000	\$0	\$3,000,000	\$33,250	\$1,730,000	NC	VETS FAM/WF HOM	52	25	VASH
Yes	Harvey Rice Heritage	Portland	Multnomah	Sabin CDC	\$400,000	\$0	\$1,242,871	\$20,808	\$1,213,506	NC	C of Color	41	9	Sec 8 HAP
	Berry Ranch 2020-4	Portland	Multnomah	Rose CDC	\$400,000	\$0	\$3,000,000	\$53,130	\$1,870,000	NC	FAM/WF	66	0	
	Garden Park 2020-4	Portland	Multnomah	Innovative Housing	\$300,000	\$0	\$3,000,000		\$2,000,000	NC AR	FAM/WF HOM	117	0	
	Bridge Meadows Lynwood	Portland	Multnomah	Bridge Meadows	\$400,000	\$0	\$3,000,000	\$49,875	\$1,655,000	NC	FYO SEN	40	0	
<b>Non-Metro PJ</b>														
Yes	1100 Charnelton	Eugene	Lane	Homes For Good	\$400,000	\$0	\$0	\$0	\$1,300,000	NC	HOM	45	45	Local PBV
<b>Tribe</b>														
Yes	WS LIHTC #2	Warm Springs	Jefferson	Warm Springs Housing Authority	\$0	\$0	\$0	\$0	\$547,579	AR	FAM/WF	18	18	HAP Ag (WSHA)
<b>Preservation</b>														
Yes	Spring Garden Apartments	Rogue River	Jackson	Chrisman Development	\$200,000	\$600,000	\$3,000,000	\$138,268	\$1,375,000	AR	SEN FAM/WF	108	90	RD
Yes	Aldercrest Apartments	Gresham	Multnomah	Human Solutions	\$400,000	\$0	\$3,000,000	\$167,573	\$1,650,000	AR	FAM/WF SEN DIS	68	59	Sec 8 HAP
Yes	East West Pres Portfolio (3)	Myrtle Creek / Madras / Vale	Doug/Jeff/Malh	TimberRiver Development	\$199,633	\$932,761	\$1,550,000	\$50,609	\$1,676,835	AR	FAM/WF DIS	92	75	RD
	Fairfield Apartments	Portland	Multnomah	Home Forward	\$400,000	\$0	\$925,000	\$0	\$1,678,300	AR	HOM SLI	82	80	RAD Conv
	Golden Eagle II	Tillamook	Tillamook	NW Coastal Housing	\$200,000	\$500,000	\$940,000	\$0	\$926,510	AR	SEN FAM/WF	33	19	RD

1181 548

9% LIHTC NOFA Recommended:	GHAP/				
	HDGP \$	HOME \$	OAHTC \$	OMEP \$	LIHTC9 \$
Tribe Set-Aside	\$0	\$0	\$0	\$0	\$547,579
Non Metro PJ	\$400,000	\$0	\$0	\$0	\$1,300,000
Balance Urban	\$200,000	\$2,100,000	\$2,775,000	\$218,459	\$1,000,000
Balance Rural	\$600,000	\$6,359,638	\$2,300,000	\$136,960	\$3,541,118
Metro	\$800,000	\$0	\$4,242,871	\$54,058	\$2,943,506
Preservation	\$799,633	\$1,532,761	\$7,550,000	\$356,450	\$4,701,835
<b>Total Resources:</b>	<b>\$2,799,633</b>	<b>\$9,992,399</b>	<b>\$16,867,871</b>	<b>\$765,927</b>	<b>\$14,034,038</b>

## Preservation NOFA Project Recommendations

Project Name	CITY	COUNTY	APPLICANT	TYPE	Population	Total Units	PBA Units	Equity & Racial Justice	Homelessness	Permanent Supportive Hsg	Affordable Rental Housing	Homeownership	Rural
Ankeny Woods	Portland	Multnomah	Human Solutions	Pres	FAM/WF	41	0	●			●		
Garden Grove	Grants Pass	Josephine	Chrisman Development	Pres	FAM/WF	60	44	●			●		●
Nyssa Court	Nyssa	Malheur	HA of Malheur & Harney Cos	Pres	FAM/WF	7	7	●			●		●
						108	51						

## HOME only NOFA Project Recommendations

Project Name	CITY	COUNTY	APPLICANT	TYPE	Population	Total Units	PBA Units	Equity & Racial Justice	Homelessness	Permanent Supportive Hsg	Affordable Rental Housing	Homeownership	Rural
Grand Apartments	Roseburg	Douglas	NeighborWorks Umpqua	A R	HOM	37	12	●	●	●	●		
Hillside Terrace Apartments	Coquille	Coos	NeighborWorks Umpqua	A R	FAM/WF	39	39	●		●	●		●
						76	51						

## 9% LIHTC NOFA Project Recommendations

Project Name	CITY	COUNTY	APPLICANT	TYPE	Population	Total Units	PBA Units	Equity & Racial Justice	Homelessness	Permanent Supportive Hsg	Affordable Rental Housing	Homeownership	Rural
1100 Charnelton	Eugene	Lane	Homes For Good	NC	HOM	45	45	●	●	●	●		
Alberta Alive (2 sites)	Portland	Multnomah	Community Dev Partners	NC	VETS FAM/WF HOM	52	25	●	●	●	●		
Aldercrest Apartments	Gresham	Multnomah	Human Solutions	Pres	FAM/WF SEN DIS	68	59	●		●	●		
Canal Commons 2	Bend	Deschutes	Pacific Crest Aff Hsg	NC	FAM/WF	48	0	●			●		
Chelsea Gardens	Warrenton	Clatsop	NWOHA	NC	FAM/WF	42	8	●		●	●		●
East West Pres Portfolio (3)	Myrtle Creek / Madras / Vale	Doug/Jeff/Malh	TimberRiver Development	Pres	FAM/WF DIS	92	75	●		●	●		●
Freedom Square II	White City	Jackson	HA of Jackson Co	NC	HOM	49	24	●	●	●	●		●
Harvey Rice Heritage	Portland	Multnomah	Sabin CDC	NC	C of Color	41	9	●			●		
Ontario Affordable Housing	Ontario	Malheur	Northwest Housing Alternatives	A R	FAM/WF DIS (SPMI)	55	10	●		●	●		●
Spring Garden Apartments	Rogue River	Jackson	Chrisman Development	Pres	SEN FAM/WF	108	90	●		●	●		
WS LIHTC #2	Warm Springs	Jefferson	Warm Springs Housing Authority	A R	FAM/WF	18	18	●		●	●		●
						618	363						



## SUMMARY

Project Name:	Ankeny Woods		
City:	Portland	County:	Multnomah
Sponsor Name:	Human Solutions, Inc.		
Urban/Rural/Preservation Scattered Site :	Urban Preservation project	Total Units	42 units (including manager)
4% LIHTC:	\$405,438	Units by Size & Affordability:	1 manager unit non restricted 16 1-bedroom @ 50% 12 2-bedroom @ 60% 7 3-bedroom @ 50% 6 4-bedroom @ 60%
HOME :	N/A	# Rent Assisted Units:	41 (98%)
GAP:	\$ 3,800,000		
OAHTC:	N/A		
OMEP:	\$68,460		

## PROJECT DETAILS

Project Description:	The Ankeny Woods project proposes a critical stabilizing rehab of 42 units of affordable housing in East Portland's. Ankeny Woods provides family-sized housing for residents with very low incomes; 50% of families make less than 30% AMI, and many are elderly. Ankeny Woods is a stable and close community; the average tenure of current residents is 9.5 years. Ankeny Woods was constructed in 1997 and soon after began to suffer from water intrusion and structural deficiencies at the decks and exterior stairs. While HSI has continued to make temporary stabilizing repairs to the stairs and decks, life safety issues led to the closure of unit decks several years ago, and unit entry stair structures are badly deteriorated. Envelope conditions have continued to worsen, ventilation issues have grown, and the plumbing system is failing. These 42 units of deeply affordable, stable housing are at risk of loss due to life safety and habitability issues, and a vulnerable community may be displaced.
Target Populations being served:	Family/Workforce
Partnerships to Serve	Human Solutions prides itself on being a culturally-responsive organization, and Resident Services staff are both multi-lingual and multi-cultural with a capacity to meet the language and cultural needs of Somali refugees, East European immigrants, and Hispanic households. At Ankeny Woods, the Resident Services Manager speaks the dominant Russian language and provides programming and services tailored to the needs and preferences of the community. Resident Services provides eviction prevention, client assistance funds, community engagement opportunities, information and resource referrals, and assistance with critical support applications. The community room at Ankeny Woods provides dedicated space for these activities and community building. Services for the property are funded through the property operating budget and further supported by the agency operating budget annually
Location:	Located in South East Portland near schools, transportation, food and shopping.



MWESB Target:	LMC is the contractor for the Ankeny Woods rehab project. Although LMC is not a certified DMWESB firm, 46% of their fulltime employees are women or minority, and they are committed to exceeding utilization goals on each of their projects. LMC has established a 30-35% MWESB participation for the Ankeny Woods rehab project, and will aggressively pursue the goal. LMC regularly exceeds 30-40% participation on other projects.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Affordable Rental Housing</li></ul>
The GHAP Preservation program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations.	



<b>SUMMARY</b>			
Project Name:	Garden Grove		
City:	Grants Pass	County:	Josephine
Sponsor Name:	Chrisman Development, Inc.		
Urban/Rural/Preservation Scattered Site :	Rural Preservation project	Total Units	60 units
4% LIHTC:	\$393,907	Units by Size & Affordability:	1 manager unit non restricted 1 1-bedroom @ 60% 57 2-bedroom @ 60% 2 3-bedroom @ 50%
HOME :	N/A	# Rent Assisted Units:	60 (100%)
GAP:	\$ 5,000,000	# Rent Assisted Units:	
OAHTC:	\$800,000		
OMEP:	\$ 126,445		

<b>PROJECT DETAILS</b>	
Project Description:	Garden Grove (aka Rogue View Apartments) is a 60-unit family project located in Grants Pass, OR. Forty-four (44) of the sixty (60) units currently have RD project-based rental assistance. The proposed scope of work includes the repair or replacement of five "OHCS Major Systems"; windows, replacement of old baseboard heaters with ductless mini-splits, upgraded smoke detectors, and fire extinguishers, site lighting, parking lot and sidewalk repairs and landscaping. Additional scope of work items include site, exterior, and interior rehabilitation.
Target Populations being served:	Family/Workforce
Partnerships to Serve	<p>Our resident service plan will identify key service providers that we will work with to ensure residents are afforded opportunities to achieve household stabilization, self-sufficiency, security, and success.</p> <ul style="list-style-type: none"> <li>•Stabilization. Households currently in crisis or those that have experienced prolonged poverty typically require their basic needs are met before the household can stabilize. These immediate needs can be met through services that mitigate obstacles to securing housing, such as support through the application process, and security deposit and rental payment assistance. Following this, families often require food, household items, and personal supplies to establish themselves in their new home.</li> </ul> <p>Seniors and persons with disabilities may require reasonable accommodations or modifications to allow these residents to fully access the features of their unit and enjoy its use as any non-disabled person would. In addition to resources for food, household supplies, and household items, these demographics may also require services to set-up the household or access to low-cost medical aide equipment.</p> <p>Special outreach methods and translated marketing materials may be required to ensure that Limited English Proficiency households are ensured equitable access to the housing communities.</p>



	<ul style="list-style-type: none"><li>• <b>Self-Sufficiency.</b> After the most immediate and urgent needs of a household have been met, households will benefit from a variety of services designed to support self-sufficiency. Commonly, these will include programs assisting households to secure childcare, access to reliable transportation, healthcare, job and skills training, and basic financial literacy and money management skills programs.</li> <li>Seniors and residents with disabilities that have been living in crisis or prolonged poverty will benefit from linkages to agencies that can help them access disability benefits, reliable and accessible transportation, regular medical care, regular assistance with household upkeep or caregiver services, and nutritional support. Additionally, vocational rehabilitation, internship opportunities, and job training services will benefit those whose disability makes obtaining and retaining employment difficult.</li> <li>English language learner classes may be beneficial to individuals that speak English less than very well to aid in them accessing resources and job attainment.</li> <li>• <b>Security and Success.</b> Achieving self-sufficiency is a stepping stone on the path to developing a strong family dynamic and ongoing security. These services will be designed to promote social interaction, increase financial security, and to encourage continued education and personal development, which may include access to community family centers, volunteer opportunities, mentorship programs, financial literacy, money management workshops, Individual Development Account opportunities, career guidance, and homeownership assistance</li></ul>
Location:	located in Grants Pass near schools, transportation, food and shopping.
MWESB Target:	To help determine our target and strategy, we considered the location of the projects and the availability of certified MWESB businesses in the area. In Josephine and nearby Jackson County, we identified thirty-four businesses listed in the COBID registry that would be relevant to this project. Based on our experience, we can assume that efforts to recruit certified businesses from other areas of Oregon will have limited success. In a recent example of this challenge, twelve of twenty-seven subcontractors invited to bid on another project due to close in July of this year were MWESB-certified. Of those twelve, only four submitted bids. Out-of-area MWESB subcontractors bidding on rural projects face the additional challenge of pricing their bids competitively due to travel costs not incurred by local firms. With these factors in mind, CDI has committed to achieving a minimum target for 5% of subcontracts (contract less general conditions, profit, overhead, and self-performed work) to be awarded to COBID certified businesses and anticipates to exceed 10% MWESB targets with the inclusion of COBID-eligible subcontractors, meaning the business likely meets MWESB criteria but has not been certified.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Affordable Rental Housing</li><li>• Rural Communities</li></ul>
The GHAP Preservation program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations.	



## SUMMARY

Project Name:	Nyssa Court		
City:	Nyssa	County:	Malheur
Sponsor Name:	Housing Authority of Malheur & Harney Counties		
Urban/Rural/Preservation Scattered Site :	Rural Preservation project	Total Units	7 units
9% LIHTC:	N/A	Units by Size & Affordability:	7 3-bedroom @ 60%
HOME :	N/A	# Rent Assisted Units:	7 (100%)
GAP:	\$ 1,150,000	# Rent Assisted Units:	7 (100%)
OAHTC:	\$460,000		
OMEP:	N/A		

## PROJECT DETAILS

Project Description:	Nyssa Court is located in the small Eastern Oregon town of Nyssa. The project was built in 1977 and consists of seven three-bedroom units in three single story walk-up style buildings, along with two small laundry rooms and on-site parking. The project is only two blocks from all three public schools in Nyssa; it is also walking distance from medical/dental facilities, grocery stores, city services, and restaurants. The project is unique in this small town because it is the ONLY affordable multifamily apartment complex that does not require a member of the household to work in agriculture. There is also an existing HAP contract on all units, allowing tenancy by very low-income families. However, this HAP contract is set to expire in less than two years and the renewal of it will be in jeopardy if the critical repair needs that have not been addressed since the project's initial construction are not funded immediately.
Target Populations being served:	Family/Workforce
Partnerships to Serve Residents	<p>Planned Services for Nyssa Court residents to be administered at Rio Vista (RD Property owned by HAMHC):</p> <ul style="list-style-type: none"> <li>• Youth educational &amp; recreational activities</li> <li>• Summer lunch program</li> </ul> <p>Planned referral services:</p> <ul style="list-style-type: none"> <li>• Youth educational and recreational activities</li> <li>• Healthy living programs</li> <li>• Financial education</li> <li>• Home Ownership education</li> <li>• Parent advocacy and involvement in the public schools</li> <li>• Job training orientations/employment assistance</li> <li>• Resident Committees for education, safety/security</li> <li>• Food/nutrition/WIC</li> <li>• Legal aid education: tenant rights and responsibilities</li> </ul>



Location:	located in the small Eastern Oregon town of Nyssa near shopping, schools, parks and transportation.
MWESB Target:	HAMHC will work to achieve at minimum 15% MWESB participation services contracts on Nyssa Court. HAMHC will employ hiring practices to ensure the diverse community they are working with, can best meet their needs. HAMHC will work within their existing contacts to preference local and diverse vendors and subcontractors.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Affordable Rental Housing</li><li>• Rural Communities</li></ul>
The GHAP Preservation program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations.	



<b>SUMMARY</b>			
Project Name:	Grand Apartments		
City:	Roseburg	County:	Douglas
Sponsor Name:	NeighborWorks Umpqua		
Urban/Rural/Preservation Scattered Site :	Rural HOME project	Total Units	37
9% LIHTC:	N/A	Units by Size & Affordability:	28 Studio (9 at 30%, 10 at 40% and 7 at 50% and 2 at <60%) 8 1-bedroom (3 at 30%, 1 at 40% and 3 at 50% and 1 at <60%) 1 2-bedroom @ <60%
HOME :	\$1,435,000	# Rent Assisted Units:	37 (100%)
GAP:	\$200,000		
OAHTC:	N/A		
OMEP:	N/A		

<b>PROJECT DETAILS</b>	
Project Description:	The Grand Apartments project is a moderate rehabilitation of an existing affordable housing project located in downtown Roseburg, Oregon. In addition to the rehab, the project will integrate twelve units of Permanent Supportive Housing into the project. This project is part of the Downtown Roseburg Integrated PSH project being developed by the Douglas County Supportive Housing Collaborative that resulted from the Oregon Supportive Housing Institute was reserved funds via the PSH miniNOFA. This project will help retain 37 units of very affordable housing while dedicating units for vulnerable chronically homeless individuals. NWU is requesting \$1,435,000 of HOME and \$200,000 of GHAP to support the project and leverage other resources.
Target Populations being served:	Homelessness
Partnerships to Serve	The comprehensive supportive services for the PSH units at the Grand Apartments will be provided by Adapt, Inc. Adapt has the capacity and expertise to provide robust quality supportive services to meet the individual needs of PSH tenants. All services will be aimed at promoting housing retention and be tenant centered. As individuals obtain and sustain housing Adapt will actively work to engage tenants in those services that they can use for recovery and improve overall health and personal growth. Services will be delivered in a culturally competent manner, (including Trauma Informed Care), and can vary in intensity based on tenant need. Services will be available on site, as well as in the community, and will include medical care, mental health care, substance use disorder services, employment and financial services, youth and family services, and vocational and educational services. Peer mentors, Case Managers, and Housing Navigators will coordinate care with Mental Health and Addictions counselors and Primary Care providers to support residents and integrate them into the community. The main goal of supportive services is housing



	stability and retention. However, other positive outcomes would include tenant satisfaction with the services and housing they receive, improvements to physical and mental health, increases in income through new employment and better financial management, and increased social and community connections.
Location:	Located in Downtown Roseburg near shopping, schools, parks and transportation.
MWESB Target:	Historically, NeighborWorks Umpqua have been able to achieve close to 5% of their subcontractors being MWESB. NeighborWorks Umpqua is prepared to create steps to incentivize increasing this number in a sustainable and systematic way.  Additional MWESB recruiting strategies and practices employed by NeighborWorks Umpqua, includes allocating extra points or a preference “boost” to MWESB firms that offer bids or respond to the Request for Proposals or Request for Qualifications offered by the organization.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Affordable Rental Housing</li><li>• Rural Communities</li><li>• Homelessness</li></ul>
The HOME program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations.	



## SUMMARY

Project Name:	Hillside Terrace Apartments		
City:	Coquille	County:	Coos
Sponsor Name:	NeighborWorks Umpqua		
Urban/Rural/Preservation Scattered Site :	Rural HOME project	Total Units	39
9% LIHTC:	N/A	Units by Size & Affordability:	14 1-bedroom @ at 50% 19 2-bedroom @ 50% 6 3-bedroom @ 50%
HOME :	\$ 2,200,000	# Rent Assisted Units:	39 (100%)
GAP:	\$ 200,000		
OAHTC:	N/A		
OMEP:	\$ 122,973		

## PROJECT DETAILS

Project Description:	Hillside Terrace is an existing, Rural Development and HUD assisted multifamily property designed for very-income families. It is in Coquille, Oregon in Coos County. Hillside is most of the affordable rental housing with rental assistance in this economically distressed community. All 39 of the units receive rental assistance. Built in 1980, the property is 40 years old. In 2005, NWU purchased and moderately rehabbed the property. In 2016, recognizing the need to preserve the property and address deferred capital needs and ongoing wear and tear, NWU secured Multifamily Preservation and Revitalization (MPR) funds from RD. To fully address the needs of the property and preserve affordable housing in Coos County, NWU is seeking HOME and GHAP funds to support the revitalization of Hillside Terrace.
Target Populations being served:	Family, Seniors, Physical Disabilities and Homelessness
Partnerships to Serve	To meet the needs of the low-income families who live at Hillside Terrace, a service coordination approach will be used to help residents better access community-based resources, social services, physical and behavioral health services and care, education, and financial opportunity resources. The service coordination approach will work via a variety of partnerships with local and regional service providers, including culturally responsive providers, as outlined in the Resident Services Plan. Overall, the approach helps residents identify barriers and connect to resources to overcome those barriers, with the main focus being addressing primary needs in health and wellbeing, increasing housing stability and retention, and enhancing access to opportunity. Service coordination will be provided to residents by a Service Coordinator who will work at the property and be available remotely. Referrals to partner agencies and service coordination activities will be tracked and evaluated on an ongoing basis. Hillside Terrace will serve as a connection point for NeighborWorks Umpqua's new Financial Opportunity Center (FOC) network. The FOC provides financial coaching, access to Individual Development Accounts, access and navigation to mainstream benefits and income support, and connection to employment and job skill resources. Resident participation in these services, and service coordination overall, is voluntary, not a condition of residency, and is centered on resident choice.



Location:	Located in the coastal community of Coquille near shopping, schools, parks and transportation.
MWESB Target:	Historically, NeighborWorks Umpqua have been able to achieve close to 5% of their subcontractors being MWESB. NeighborWorks Umpqua is prepared to create steps to incentivize increasing this number in a sustainable and systematic way.  Additional MWESB recruiting strategies and practices employed by NeighborWorks Umpqua, includes allocating extra points or a preference “boost” to MWESB firms that offer bids or respond to the Request for Proposals or Request for Qualifications offered by the organization.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Affordable Rental Housing</li><li>• Rural Communities</li><li>• Homelessness</li></ul>
	The HOME program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations.



## SUMMARY

Project Name:	1100 Charnelton		
City:	Eugene	County:	Lane
Sponsor Name:	Homes For Good		
Urban/Rural/Preservation Scattered Site :	Region: Non-Metro PJ	Total Units	45
9% LIHTC:	\$1,300,000	Units by Size & Affordability:	45 STU (45@50%)
HOME :		# Rent Assisted Units:	45
GAP:	\$400,000		
OAHTC:			
OMEP:			

## PROJECT DETAILS

Project Description:	Homes for Good Housing Agency and Lane County, Oregon are leading the effort to develop a new, 45-unit permanent supportive housing (PSH) apartment community at 1100 Charnelton in Eugene, Oregon, which will be designated for people experiencing chronic homelessness. This team came together to develop The Commons on MLK, a 51-unit PSH community currently under construction. The collaboration at 1100 Charnelton will build upon this strong partnership and the training and technical assistance received as part of the recently completed PSH Cohort. Using the Housing First/harm reduction model, this apartment community will provide permanent, stable housing as the first priority, while also offering the support services necessary to ensure each individual's maximum opportunity for accessing care and overcoming homelessness. The site is ideally located in downtown Eugene near facilities that provide access to these opportunities.
Target Populations being served:	Formerly or currently homeless
Partnerships to Serve Residents	Homes For Good is partnering with Lane County Health & Human Services to procure the supportive service provider and to oversee service delivery at 1100 Charnelton. The service provider will be expected to coordinate mental health treatment, primary care, and substance use treatment in partnership with the local Coordinated Care Organizations. In keeping with a Housing First and Permanent Supportive Housing model, all supportive services will be voluntary. Resident services to be provided on site will be individualized and involve each resident in their own planning, but will include enhanced life skills, linkages to employment and education, social activities, asset building, and debt repair.
Location:	This PSH project is located near local health care and behavioral health services, which will allow access to any necessary services not able to be provided onsite. Within 5 blocks of 1100 Charnelton will be Community Health Centers of Lane County, Willamette Family Rapid Access Center, and the Medication Assisted Treatment Center through Lane County Behavioral Health. The site is also located just several blocks from downtown Eugene, 5 <sup>th</sup> Street Market, and both Skinner Butte Park and Alton Baker Park, and is across the street



503-986-2000   www.oreg	from the Eugene Public Library. The central Eugene bus station, with 17 bus lines operating out of it, is one block away.
MWESB Target:	15% MWESB utilization (40% of predevelopment services to date are MWESB firms)
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Equity and Racial Justice</li><li>• Permanent Supportive Housing</li><li>• Homelessness</li><li>• Affordable Rental Housing</li></ul>
The LIHTC program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations.	
The team constructing this project has been through the PSH Institute and will incorporate their experience into the inclusion of PSH units in this project, which will help house chronically homeless individuals.	

1100 Charnelton



## SUMMARY

Project Name:	Alberta Alive		
City:	Portland	County:	Multnomah
Sponsor Name:	Community Development Partners (CDP)		
Urban/Rural/Preservation Scattered Site :	Region: Metro (scattered site)	Total Units	52
9% LIHTC:	\$1,730,000	Units by Size & Affordability:	7 STU (7@30%) 29 1-bedroom (25@30%, 4@50%) 8 2-bedroom (8@50%) 8 3-bedroom (2@30%, 6@50%)
HOME :		# Rent Assisted Units:	25
GAP:	\$400,000		
OAHTC:	\$3,000,000		
OMEP:	\$33,250		

## PROJECT DETAILS

Project Description:	Alberta Alive is a scattered site development on Portland's NE Alberta Street that stakes out a different model for African American and homeless Veteran communities, and puts a Black-led organization in an ownership role. Through co-development and co-ownership, CDP and Self Enhancement Inc. (SEI) will create 52 units in two community-informed affordable housing properties, enhanced with culturally specific services. 4957 NE 8th will bring 31 units for extremely low-income individuals; 25 of which will be PSH units with VASH vouchers and case management services from the VA. 506 NE Alberta will have 21 units, a majority of which will be sized for families with children. Additionally, the project provides an opportunity to build capacity in SEI, one of the longest running and most effective organizations serving Portland's Black community, giving them an entry into real estate development and long-term asset building in the heart of the City's historic African American neighborhood.
Target Populations being served:	Veterans, Homeless Veterans, Family/Workforce
Partnerships to Serve	CDP is partnering with SEI to provide onsite youth and family programming, and will also provide a Resident Services Coordinator (RSC) who will be onsite 10 hours per week to provide one-on-one counseling and support for residents. CDP will also partner with Veterans Affairs Administration to provide services at their site for homeless veterans including case management, in-person counseling, and referrals to non-VA social services. SEI will also provide an RSC to this site to provide trauma and healing-informed, relational services.
Location:	Alberta Alive's two sites have walk scores of 92 and 91, respectively, and both are close to Frequent Stop Trimet bus routes, with three major lines within a half mile. There is an elementary school one block, PCC Cascade is 0.9 miles, and PCC Workforce training center is 2.3 miles from the sites. SEI's Center for Self Enhancement is located one mile from the



503-986-2000   www.oreg	sites. Alberta Alive is also a quarter mile from Alberta Abbey community center, a non-profit community space offering office and event space, a café, an auditorium, and a variety of meeting rooms.
MWESB Target:	35% MWESB utilization in construction; 76.5% MWESB utilization in project design
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Equity and Racial Justice</li><li>• Permanent Supportive Housing</li><li>• Homelessness</li><li>• Affordable Rental Housing</li></ul>
<p>The LIHTC program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations. The leadership role of SEI in this project puts a Black-led organization at the center of their model, helping to market the project to the Black community, and then to provide culturally specific and culturally competent services and property management to that community as well.</p> <p>This project also contains 25 PSH units that will help to house chronically homeless veterans.</p>	

Alberta Alive



## SUMMARY

Project Name:	Aldercrest Apartments		
City:	Gresham	County:	Multnomah
Sponsor Name:	Human Solutions		
Urban/Rural/Preservation Scattered Site :	Urban Preservation	Total Units	68 Units
9% LIHTC:	\$ 1,650,000	Units by Size & Affordability:	24 1-bedroom (23@30% and 1@60%) 44 2-bedroom (36@30% and 8@60%)
HOME :	N/A	# Rent Assisted Units:	59 HAP units
GAP:	\$ 400,000	# Rent Assisted Units:	
OAHTC:	\$ 3,000,000		
OMEP:	\$ 167,573		

## PROJECT DETAILS

Project Description:	Aldercrest Apartments is a 68-unit project with a 59-unit Federal Section 8 Project-Based contract which is currently <b>set to expire on November 30, 2020</b> . The current owner of Aldercrest intends to let the Section 8 contract expire and sell the building to an investor who can flip the affordable units to market rate. Human Solutions has site control and, if awarded funds in this NOFA, intends acquire and rehab the project, preserving the HUD contract and the property's long-term affordability. Roughly a third of the 100+ residents are elderly, a third are on disability, and there are numerous families with small children on site - all are at risk of permanent displacement. Originally constructed in 1971, Aldercrest will require an extensive interior and exterior rehab, including full envelope replacement (WRB, siding, windows, roofs and doors), kitchen cabinets, flooring, appliances, water heaters, lights, faucets and fixtures, and galvanized water supply lines.
Target Populations being served:	Family/Workforce, Elderly and Disabled
Partnerships to Serve Residents	All Resident Services programs have an initial priority of housing stability – accessing rent and utility assistance, eviction prevention, and coordinating with other service providers with different expertise with a variety of populations. Human Solutions seeks to hire staff that reflect the racial and ethnic make-up of the project. As a culturally responsive agency, Resident Services staff are trained and encouraged to meet the needs of residents. Resident Services staff speak Russian, Somali, and French with access to Spanish-speaking staff when needed. We also employ staff with an understanding of the systemic issues facing those living on low and very low incomes and the personal challenges these individuals and families face, often on a daily basis. Our staff are individuals who came to the United States as refugees and immigrants, individuals who have lived experience of being poor and living in HSI housing, and long-term staff with years of Resident Services training. All potential candidates for employment at Human Solutions must address questions in regard to Trauma Informed Care, why people live in poverty, and their experience working in a diverse work place and with diverse clients. Resident Services staff work as a team to ensure residents have access to services in their



	first language so there is clear communication and understanding between residents, property management, and other service providers.
Location:	Projects are close to shopping, food, entertainment, schools and places of worship
MWESB Target:	LMC is not a certified DMWESB firm. However, 46% of our fulltime employees are female or minority and we are committed to exceeding our client's utilization goals on each of our projects. Most of our projects exceed 25%, even in cases where there is no stated goal. Many of our projects exceed 30 and 40%. Over the years, this commitment has involved much more than just awarding subcontracts to certified firms. LMC's president and staff have dedicated time, money and other resources to foster growth with DMWESB firms
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>● Affordable Rental Housing</li><li>● Preservation</li></ul>
The LIHTC program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations.	



## SUMMARY

Project Name:	Canal Commons 2		
City:	Bend	County:	Deschutes
Sponsor Name:	Pacific Crest Affordable Housing		
Urban/Rural/Preservation Scattered Site :	Region: Balance Urban	Total Units	48
9% LIHTC:	\$1,000,000	Units by Size & Affordability:	18 1-bedroom (18@50%) 22 2-bedroom (22@50%) 8 3-bedroom (8@50%)
HOME :	\$2,100,000	# Rent Assisted Units:	0
GAP:	\$200,000	# Rent Assisted Units:	
OAHTC:	\$2,775,000		
OMEP:	\$218,459		

## PROJECT DETAILS

Project Description:	Canal Commons 2, to be developed by Pacific Crest Affordable Housing, will provide 48 new units of much-needed high quality affordable housing for workforce/family households earning equal to or less than 50% of AMI. The project, which will contain a mix of one-, two-, and three-bedroom units, will be the second phase of the Canal Commons project. The first phase, Canal Commons 1, is currently under construction and is scheduled to open in December 2020.  The project, situated on 2 lots adjacent to Canal Commons 1, will be located in a very desirable and convenient location, close to commercial services, schools, transportation corridors, parks, and walking/biking paths, and adjacent to the 126-acre Pine Nursery park and recreation facility.  Residents will have access to laundry facilities in each building, in addition to amenities shared with Canal Commons 1, including raised bed gardens, a playground area, green spaces, and a large community room with free WiFi and a fitness area.
Target Populations being served:	Family/Workforce
Partnerships to Serve Residents	Pacific Crest Affordable Housing is partnering with the Latino Community Association to market to the Latinx community in their area, primarily through translation of materials and distribution to culturally relevant locations. Pacific Crest is also partnering with Thrive Central Oregon, who will provide trauma-informed and culturally responsive social work services, the Early Learning Hub of Central Oregon, who will provide onsite family engagement linking at-risk families with services and supports, and Mosaic Medical, an organization that provides affordable health care to low-income people who are under or un-insured.
Location:	Canal Commons 2 is located adjacent to Pine Nursery Park, a 126 acre park with a sports complex. The resident service provider is on site at the adjacent property. There is a bus stop .5 miles from the site, and there are 3 elementary schools, 1 middle school, and 3 high



503-986-2000   <a href="http://www.oregohousing.org">www.oregohousing.org</a>	<p>schools within less than 2 miles. This census tract was also identified as an Opportunity Area, as it had a higher median income, greater entry level job to labor ratio, higher Labor Market Engagement score, and higher percentage of owner occupied units compared to other Balance of State Urban census tracts. In addition, the site's nearest elementary school was also rated Above Average by GreatSchools.com.</p>
MWESB Target:	6% MWESB utilization
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Equity and Racial Justice</li><li>• Affordable Rental Housing</li></ul>
The LIHTC and HOME programs require that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations.	

Canal Commons 2



## SUMMARY

Project Name:	Chelsea Gardens		
City:	Warrenton	County:	Clatsop
Sponsor Name:	NW Oregon Housing Authority		
Urban/Rural/Preservation Scattered Site :	Region: Balance Rural	Total Units	42
9% LIHTC:	\$1,086,482	Units by Size & Affordability:	12 1-bedroom (5@30%, 4@50%, 3@60%) 19 2-bedroom (2@30%, 10@50%, 7@60%) 11 3-bedroom (1@30%, 5@50%, 5@60%)
HOME :	\$1,977,436	# Rent Assisted Units:	8
GAP:	\$200,000		
OAHTC:	\$1,350,000		
OMEP:	\$136,960		

## PROJECT DETAILS

Project Description:	<p>Chelsea Gardens is a 42-unit, 4 story affordable housing project with 1, 2 and 3-bedroom units proposed for Warrenton, Oregon. It addresses the severe unmet housing needs of underserved families, workers and special needs households on the North Coast with robust, culturally responsive outreach and targeted resident service programs.</p> <p>With design informed by the community, it will offer a high percentage of larger units and many family-oriented amenities including a playground, community gardens, and outdoor gathering space. Chelsea Gardens is a new model for affordable family housing in rural Oregon.</p> <p>Chelsea Gardens is a design/build demonstration project for Walsh Construction's Cost Efficient Design and Construction (CEDC) efforts, bringing cost-efficient building approaches to Oregon's underserved rural areas. Outside of tsunami and flood zones and next to amenities, this site is a unique opportunity for greatly needed new affordable development on Oregon's North Coast.</p>
Target Populations being served:	Serious and Persistent Mental Illness (SPMI), Agricultural Workers, and Family/Workforce
Partnerships to Serve Residents	NWOHA is partnering with the Clatsop Community Action and the Lower Columbia Hispanic Council (LCHC) to market the project to populations least likely to apply, particularly the Latinx population in the area. LCHC will also provide services including immigration assistance, IDAs, and self-sufficiency programs. Clatsop Behavioral Health will be providing individual treatment and case management for clients residing in SPMI set-aside units.
Location:	Chelsea Gardens is under a mile from Warrenton City Park, and less than 3 miles from Fort Stevens State Park, consistently ranked as one of the best state parks to visit in Oregon. There are a number of employment opportunities nearby, including a seafood plant 1.4



503-986-2000   <a href="http://www.oregohousing.org">www.oregohousing.org</a>	miles away, and a large commercial center within a quarter mile. The NW Connector bus that runs from Seaside to Astoria is located less than a quarter mile away also. Lastly, the local high school and elementary school are both less than one mile away from the proposed site for Chelsea Gardens.
MWESB Target:	30% MWESB utilization
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Equity and Racial Justice</li><li>• Rural Communities</li><li>• Homelessness</li><li>• Affordable Rental Housing</li></ul>
The LIHTC and HOME programs require that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations. This project will also serve agricultural workers and includes partnership with LCHC to market units to the Latinx community and to help serve that population after lease up.	
This project is located in a rural community, and it has some units set aside to serve houseless individuals or individuals at risk of homelessness with SPMI.	

### Chelsea Gardens



<b>SUMMARY</b>			
Project Name:	East West Preservation Portfolio		
City:	Myrtle Creek	County:	Douglas
Sponsor Name:	TimberRiver Development, Inc.		
Urban/Rural/Preservation Scattered Site :	Rural Preservation	Total Units	92 Units
9% LIHTC:	\$ 1,676,835	Units by Size & Affordability:	<ul style="list-style-type: none"> <li>• 30 1-bedroom (7@30%, 9@40%, 9@50% and 5@60%)</li> <li>• 59 2-bedroom (16@30%, 15@40%, 19@50% and 9@60%)</li> <li>• 3 Mgr</li> </ul>
HOME :	\$ 932,761	# Rent Assisted Units:	75 RD units (82%)
GAP:	\$ 199,633		
OAHTC:	\$ 1,550,000		
OMEP:	\$ 50,609		

<b>PROJECT DETAILS</b>	
Project Description:	The East West Preservation Portfolio is made up of three 515 expiring USDA Rural Development properties with two of the three projects set to expire in February 2021! The projects are: Meadowlark Court, a 42-unit complex with 6 two story buildings built in 1975 located in Myrtle Creek. Jefferson Court, a 26-unit complex with 3 two story buildings constructed in 1978 located in Madras. And Malheur Village, a 24-unit complex with 3 two story buildings built in 1976 located in Vale. Collectively, all projects provide 92 households 60% AMI or less rents for low income tenants with 75 units (82%) of project-based USDA RD Rental Assistance (RA) to cover any gaps in income to pay the remainder of rent. It is critical to preserve this housing as once the 515 loans are paid off the RA will also disappear. There is no new construction planned for these rural locations and with the increasing financial insecurity of our communities it is imperative to preserve valuable federal resources.
Target Populations being served:	Family/Workforce, Seniors, Physical Disabled and Survivors of Domestic Violence
Partnerships to Serve Residents	<p>Families:</p> <ul style="list-style-type: none"> <li>• Improve the resident's ability to maintain their lease obligation and enhance the quality of their life through education and employment, income and asset building.</li> <li>• Improve child and youth development.</li> <li>• Improve access to community services for health, well-being and self-sufficiency.</li> </ul> <p>Elderly and people with special needs:</p> <ul style="list-style-type: none"> <li>• Ability to maintain lease through aging process.</li> <li>• Improve access to health and daily living support services.</li> <li>• Improve access to socialization and community building services.</li> </ul>



	<p><b>Culturally Responsive Services</b></p> <ul style="list-style-type: none"><li>• Ensure that services offered by the supportive service agencies are adaptive and respect the belief, practices and culture of the tenants.</li></ul> <p><b>Communities of Color</b></p> <ul style="list-style-type: none"><li>• Data obtained and tracked to meet the needs of a diverse tenant population.</li><li>• Combined with the cultural services offer organized and professional resources.</li></ul> <p><b>Asset Building Strategies</b></p> <ul style="list-style-type: none"><li>• Encourage educational and training opportunities through partnerships of the agencies and local community colleges.</li><li>• Connect tenants to local providers of IDA accounts to access the program.</li><li>• Commitment to the Service Provider agencies to notify them of any tenants that are in distress to help prevent evictions.</li></ul>
Location:	Projects are close to shopping, food, entertainment, schools and places of worship
MWESB Target:	<p>In the capacity of contractors and subcontractors, East West Preservation Portfolio, LLC in conjunction with SRI-Rochlin Construction Services as General Contractor has set the following objectives in the effort to employ low and very low income OMWESB contractors and subcontractors include the following:</p> <ul style="list-style-type: none"><li>• Advertisements for the upcoming project bid date requesting participation from any and all registered Section 3 firms or individuals. The ads would be strategically placed in publications that reach the communities that are adjacent to each location as well as Statewide publications that serve the typical bidding public.</li><li>• A reach-out to all Section 3 firms listed on the Oregon OMWESB website by either a mailing or email.</li><li>• Advertisement of any job openings through the State of Oregon Employment offices specific to each location.</li><li>• A copy of each property bid documents will be posted in plan centers and Builder's Exchange offices located in the area of each property location.</li></ul> <p>The general contractor understands the intent to reach as many Section 3 participants as possible and will make their best effort to meet the goals above.</p>
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Affordable Rental Housing</li><li>• Preservation</li></ul>
The LIHTC program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations.	



## SUMMARY

Project Name:	Freedom Square II		
City:	White City	County:	Jackson
Sponsor Name:	Housing Authority of Jackson County		
Urban/Rural/Preservation Scattered Site :	Region: Balance Rural	Total Units	49
9% LIHTC:	\$1,127,136	Units by Size & Affordability:	12 1-bedroom (12@50%) 26 2-bedroom (26@50%) 11 3-bedroom (11@50%)
HOME :	\$900,000	# Rent Assisted Units:	24
GAP:	\$200,000		
OAHTC:			
OMEP:			

## PROJECT DETAILS

Project Description:	Freedom Square II (FSII) is a 3.1 acre, 50-unit affordable housing development located in White City. The site abuts an existing HAJC 34-unit LIHTC project called Freedom Square (FS). FSII is a mix of 1, 2 and 3-bedroom apartments and townhouses. There are 7 buildings with 81 parking spaces. FSII will share the community building with the adjacent FS development. FSII includes 2 playground areas. FSII and FS will share the use of the community building and playgrounds. 24 units have project-based vouchers (PBV). 12 of these units are for Homeless Veterans (all 1-bedrooms) and 6 units are for Homeless Families with Children & Homeless Youths.
Target Populations being served:	Homeless families with children, homeless veterans, family/workforce
Partnerships to Serve Residents	HAJC is partnering with the VA to provide long-term clinical case management services for residents, including medical, psychiatric, and legal services, substance abuse treatment, and medication management. HAJC is also partnering with Maslow Project, whose services support the transition and retention of homeless families and homeless youth in HAJC dedicated units, as well as provision of case management and referrals focused on housing stability for those families and youth.
Location:	FSII is located in a neighborhood of multi and single-family homes and is ¼ mile from a local community center, park, library, elementary, middle and high school, and employment centers. Public transportation is within ½ mile.
MWESB Target:	No specific target but an “MWESB Participation Plan” in place that includes a solicitation list, division of labor, partnership with local chamber of commerce, education on MWESB certification to subcontractors, and requirements for prime contractor to seek MWESBs where possible.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"> <li>• Equity and Racial Justice</li> </ul>



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- Homelessness
- Rural Communities
- Affordable Rental Housing

The LIHTC and HOME programs require that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations.

This project is also based in a rural part of the state and will serve previously homeless persons.

**Freedom Square II**



## SUMMARY

Project Name:	Harvey Rice Heritage		
City:	Portland	County:	Multnomah
Sponsor Name:	Sabin CDC		
Urban/Rural/Preservation Scattered Site :	Region: Metro (scattered site)	Total Units	41
9% LIHTC:	\$1,213,506	Units by Size & Affordability:	6 STU (1@50%, 5@60%) 12 1-bedroom (12@60%) 13 2-bedroom (13@60%) 10 3-bedroom (10@60%)
HOME :		# Rent Assisted Units:	9
GAP:	\$400,000		
OAHTC:	\$1,242,871		
OMEP:	\$20,808		

## PROJECT DETAILS

Project Description:	Sabin CDC's Harvey Rice Heritage honors Sabin Board Chair, Mr. Harvey Rice, and his legacy of advocacy with the name of the project. The two buildings are named for Isaka Shamsud-Din and Charlotte Lewis, artists who worked in NE Portland and wove their African-American heritage with their art as a means of strengthening the voice of their community. This 2-site project will leverage underutilized properties in Sabin's existing portfolio to create a total of 41 new healthy and accessible units with 23 family-sized units. Sabin's resident population is 70% African American, and, with support from Meyer Memorial Trust, Sabin has explored creating a more inclusive umbrella for this population. To make this inclusion sustainable, Sabin is partnering with Community Vision (that serves people with disabilities) and Iron Tribe Network (that serves those recently exiting incarceration), organizations with proven track records and thriving clients, to broaden our approach to equity & inclusion.
Target Populations being served:	Physical Disability, Intellectual and Developmental Disability, Previously Incarcerated, African Americans and communities of color at risk of displacement due to gentrification
Partnerships to Serve Residents	Sabin CDC is partnering with the Community Vision to provide individualized, person-centered support services for residents with disabilities. Sabin CDC will also work with Iron Tribe Network to house and support previously incarcerated individuals in their often challenging transitions from group living to fully independent living.
Location:	This is a scattered site project, with both sites in Portland. One site is in the Alberta neighborhood and the other is in the Cully neighborhood. Both sites are eligible for Metro TOD funds, and are both within a quarter mile of frequent bus service. The Alberta site has a walk score of 93, and is a quarter mile from Sabin's offices where resident services can be accessed (in addition to the onsite services provided). The Cully site is within a quarter mile of Living Cully Plaza, a mixed use development with employment opportunities connected to it, and also has a community room for onsite resident services.



503-986-2000   <a href="http://www.oregohousing.org">www.oregohousing.org</a> MWESB Target:	35% MWESB utilization for construction and 20% MWESB utilization goal for professional service contracts
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Equity and Racial Justice</li><li>• Homelessness</li><li>• Affordable Rental Housing</li></ul>
The LIHTC program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations. This project is based in N/NE Portland and will intentionally support the Black community that is actively being displaced from those gentrifying neighborhoods.	
The previously incarcerated population is at high risk of homelessness, with an estimated 60% of formerly incarcerated persons living on the street due to housing barriers. Having a partnership with Iron Tribe Network and units set aside for this population will help keep this vulnerable population housed.	

Harvey Rice Heritage



## SUMMARY

Project Name:	Ontario Affordable Housing		
City:	Ontario	County:	Malheur
Sponsor Name:	Northwest Housing Alternatives		
Urban/Rural/Preservation Scattered Site :	Region: Balance Rural	Total Units	55
9% LIHTC:	\$1,327,500	Units by Size & Affordability:	16 STU (6@30%, 6@50%, 4@60%) 23 1-bedroom (10@30%, 9@50%, 4@60%) 16 2-bedroom (6@50%, 10@60%)
HOME :	\$3,482,202	# Rent Assisted Units:	10
GAP:	\$200,000		
OAHTC:	\$950,000		
OMEP:			

## PROJECT DETAILS

Project Description:	Northwest Housing Alternatives (NHA) proposes Ontario Affordable Housing (the Project), a place to call home for working families and people receiving a continuum of care for HIV/AIDS, mental illness, and chronic homelessness. There is an immense need for well-built, affordable housing with wraparound services in Ontario, one of the poorest cities in a county with Oregon's highest poverty rate. To address these needs NHA has partnered with 10 local organizations through the Malheur United for Housing Task Force to provide services and supports at the project to ensure positive outcomes for residents. The proposed site is a former senior care facility that is ideally located in the community and capable of providing 56 new homes including: 16 studios, 23 one-bedrooms, and 17 two-bedrooms. All the pieces are in place to ensure that the moment funding is received, this project is ready to transform the lives of its future residents and create brighter opportunities for Ontario.
Target Populations being served:	Serious and Persistent Mental Illness (SPMI), Person with HIV/AIDS, Formerly or Currently Homeless, Family/Workforce
Partnerships to Serve	NHA is partnering with Euvalcree to market units to the Latinx community and provide a resident services coordinator to the project. NHA is also partnering with Lifeways to provide mental health case management for residents living in the HUD 811 units as well as comprehensive service plans.
Location:	This project is in a census tract identified as Vulnerable to Gentrification. This is due to it being located in a Qualified Census Tract with a higher percentage population of people of color, higher percentage of renters, and lower percentage of residents with a high school degree than other rural census tracts. It is just across the street from the Malheur County Housing Authority and Beck-Kiwanis Park behind it, as well as just 0.1 miles away from a



503-986-2000   www.oreg	City of Ontario bus stop. It is 2.6 miles from Lifeways treatment center and one mile from the nearest elementary school.
MWESB Target:	25% MWESB utilization
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Equity and Racial Justice</li><li>• Rural Communities</li><li>• Permanent Supportive Housing</li><li>• Homelessness</li><li>• Affordable Rental Housing</li></ul>
The LIHTC and HOME programs require that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations. NHA also has an MOU with Euvalcree to provide culturally specific resident services and assist with marketing effort to the Latinx community.	
This project is in a rural community, and it includes HUD 811 units to provide permanent supportive housing to formerly houseless individuals experiencing chronic homelessness.	

#### Ontario Affordable Housing



## SUMMARY

Project Name:	Spring Garden Apartments		
City:	Rogue River	County:	Jackson
Sponsor Name:	Chrisman Development, Inc.		
Urban/Rural/Preservation Scattered Site :	Rural Preservation	Total Units	108 Units
9% LIHTC:	\$ 11,560,312	Units by Size & Affordability:	<ul style="list-style-type: none"> <li>• 52 1-bedroom (12@30%, 33@50% and 7@60%)</li> <li>• 54 2-bedroom (6@30%, 28@50% and 20@60%)</li> <li>• 2 Mgr</li> </ul>
HOME :	\$ 600,000	# Rent Assisted Units:	90 RD units (83.3%)
GAP:	\$ 200,000	Insert Pictures	
OAHTC:	\$ 3,000,000		
OMEP:	\$ 138,268		

## PROJECT DETAILS

Project Description:	Spring Garden Apartments is a portfolio of three RD properties located in Jackson County (the Medford MSA). The properties are located in Rogue River, Gold Hill, and Talent. The project consists of a total of 108 units with 90 units of RD rental assistance, 100 units are elderly and 8 units are family. The unit mix is 52 one-bedroom and 56 two-bedroom units. The properties are currently the only RD 515 properties in the Housing Authority of Jackson County's affordable housing portfolio. One of the three projects is eligible for prepayment (conversion to market); however, it is the intent of the Housing Authority to sell all three as a portfolio.
Target Populations being served:	Family/Workforce, Seniors, Physical Disabled and Survivors of Domestic Violence
Partnerships to Serve Residents	<p>Families:</p> <ul style="list-style-type: none"> <li>• Improve the resident's ability to maintain their lease obligation and enhance the quality of their life through education and employment, income and asset building.</li> <li>• Improve child and youth development.</li> <li>• Improve access to community services for health, well-being and self-sufficiency.</li> </ul> <p>Elderly and people with special needs:</p> <ul style="list-style-type: none"> <li>• Ability to maintain lease through aging process.</li> <li>• Improve access to health and daily living support services.</li> <li>• Improve access to socialization and community building services.</li> </ul> <p>Culturally Responsive Services</p> <ul style="list-style-type: none"> <li>• Ensure that services offered by the supportive service agencies are adaptive and respect the belief, practices and culture of the tenants.</li> </ul> <p>Communities of Color</p> <ul style="list-style-type: none"> <li>• Data obtained and tracked to meet the needs of a diverse tenant population.</li> </ul>



	<ul style="list-style-type: none"><li>• Combined with the cultural services offer organized and professional resources.</li></ul> <p><b>Asset Building Strategies</b></p> <ul style="list-style-type: none"><li>• Encourage educational and training opportunities through partnerships of the agencies and local community colleges.</li><li>• Connect tenants to local providers of IDA accounts to access the program.</li><li>• Commitment to the Service Provider agencies to notify them of any tenants that are in distress to help prevent evictions.</li></ul>
Location:	Projects are close to shopping, food, entertainment, schools and places of worship
MWESB Target:	To help determine our target and strategy, we considered the location of the projects and the availability of certified MWESB businesses in the area. In Jackson County, we identified thirty-four businesses listed in the COBID registry that would be relevant to this project. Based on our experience, we can assume that efforts to recruit certified businesses from other areas of Oregon will have limited success. In a recent example of this challenge, twelve of twenty-seven subcontractors invited to bid on another project due to close in July of this year were MWESB-certified. Of those twelve, only four submitted bids. Out-of-area MWESB subcontractors bidding on rural projects face the additional challenge of pricing their bids competitively due to travel costs not incurred by local firms. With these factors in mind, CDI has committed to achieving a minimum target for 5% of subcontracts (contract less general conditions, profit, overhead, and self-performed work) to be awarded to COBID certified businesses and anticipates to exceed 10% MWESB targets with the inclusion of COBID-eligible subcontractors, meaning the business likely meets MWESB criteria but has not been certified.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Affordable Rental Housing</li><li>• Preservation</li></ul>
The LIHTC program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations.	



## SUMMARY

Project Name:	WS LIHTC #2		
City:	Warm Springs	County:	Jefferson
Sponsor Name:	Warm Springs Housing Authority		
Urban/Rural/Preservation Scattered Site :	Tribal Land; Region: Balance Rural	Total Units	18
9% LIHTC:	\$547,579	Units by Size & Affordability:	12 2-bedroom (12@60%) 6 3-bedroom (6@60%)
HOME :		# Rent Assisted Units:	18
GAP:			
OAHTC:			
OMEP:			

## PROJECT DETAILS

Project Description:	The Project's scope includes the rehabilitation of 18 total units consisting of twelve (12) two-bedroom units and six (6) three-bedroom units. The proposed project is on scattered sites known as the Elk Loop site and the Foster/Sherer site on the Confederated Tribes of Warm Springs Reservation in Warm Springs, OR. The WS LIHTC #2 Limited Partnership will own and operate the project, of which the Warm Springs Housing Authority ("WSHA") will serve as the sole general partner. The WSHA will manage all operations of the Project, as well as serve as sponsor, property manager, and developer of the proposed project. A full breakout of the development team is included in our application materials. This project will allow us to leverage our limited funds to provide much needed rehabilitation to 18 units on the Reservation. The newly rehabbed units will provide safe, sustainable and affordable homes our tribal members can be proud of.
Target Populations being served:	Confederated Tribes of Warm Springs Members, Family/Workforce
Partnerships to Serve Residents:	All residents of the WS LIHTC #2 project will have unrestricted and immediate access to all tribal supportive services. These empowerment services provided by the tribe and WSHA represent a traditional commitment to treat the individual and the family holistically. Residents will have access to a tribal-wide referral system that includes a case management approach that focusses on immediate and long-range needs of the individual and family. In partnership with Warm Springs Credit Enterprise, WSHA will also work to ensure the availability of financial literacy and credit counseling for residents of the project.
Location:	The WS LIHTC #2 project is located on Tribal Land of the Confederated Tribes of Warm Springs. The census tract was identified in scoring as an area highly vulnerable to gentrification, due to its status as a Qualified Census Tract and an Opportunity Zone, as well as its high percentage of people of color, high percentage of renters, and low percentage of residents with a high school degree when compared to other Balance of State Rural census tracts. In addition, the site is within a half mile of the Cascades East Transit bus stop, and is within one mile of Elmer-Quinn Memorial Park, the Community Center, and the



503-986-2000   <a href="http://www.oregon.gov">www.oregon.gov</a>	Warm Springs Health and Wellness Center. It is within 1.5 miles of a grocery store and the local elementary, middle, and high schools.
MWESB Target:	Warm Springs Housing Authority plans to provide tribal preference in selecting contractors and subcontractors, and will follow their procurement policies which require Indian preference. These policies require that, to the greatest extent feasible, preference and opportunities for training and employment be given to Indians and preference in the award of contracts, subcontracts, and professional services shall be given to Indian organizations and Indian-owned economic enterprises. Where not possible, WSHA will target MWESB State Registered contractors and subcontractors as a next step.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"><li>• Equity and Racial Justice</li><li>• Rural Communities</li><li>• Affordable Rental Housing</li></ul>
The LIHTC program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement and engage MWESB organizations. This project is also located on Tribal Land in a rural community, and will be serving members of the Confederated Tribes of Warm Springs.	

WS LIHTC #2



## OREGON HOUSING and COMMUNITY SERVICES

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Date: August 7, 2020

To: Housing Stability Council  
Margaret Solle Salazar, Executive Director

From: Amy Cole, State Development Resources Manager  
Natasha Detweiler-Daby, Assistant Director Policy & Planning  
Julie V. Cody, Director Affordable Rental Housing

### **Re: Year-Two Framework for Permanent Supportive Housing**

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#### **Overview:**

The 2019 Oregon Legislature committed resources to establish the OHCS Permanent Supportive Housing effort. These resources included \$50 million in development capital as well as 500 slot of rent assistance and supportive services funding, in partnership with the Oregon Health Authority. In February 2019, Housing Stability Council (HSC) adopted the framework for the first-year pilot launch of our Permanent Supportive Housing initiative.

At the August 2020 HSC meeting, we will be introducing the strategy for deploying year-2 resources to projects. After incorporating feedback, we will aim to bring back to HSC in September in order to finalize the framework. This works supports our Permanent Supportive Housing Statewide Housing Plan Priority; our five year goal was to fund 1,000 units and we are excited to report that we have already funded over 400 PSH units across the state!

#### **Background:**

Permanent Supportive Housing (PSH) combines affordable housing, rent assistance, and wraparound supportive services and is a proven model for housing communities' most vulnerable people who may not otherwise be able to maintain stable housing. The goal for these efforts is to create housing for those experiencing chronic homelessness.

The first year pilot of the PSH Initiative focused on the creation of an Oregon PSH Institute; the Corporation Supportive Housing (CSH) conducts this for project-specific teams of developers, property managers, and service providers participate in a 5-month long training and technical assistance program. With a focus on getting units place in service as soon as possible, the first-year resources were made available to PSH Institute project teams. In [April 2020](#), Housing



Stability Council approved the commitment of resources to eight teams with projects located across the state. With \$37 million in development capital, these investments will create 206 units of PSH to serve those experiencing chronic homelessness.

Looking to the second-year, OHCS has approximately \$15 million in development capital, and nearly 300 slots of rent assistance and supportive services funds, available to commit to projects. With that lens, the framework for the second-year resources are built with the following priorities:

1. Continued reliance on PSH Institute training and technical assistance to ensure successful execution, which requires relationships and formal agreements among developers, service providers, and management entities.
2. Leveraging additional development resources to ensure the successful commitment of the remaining 321 spots of PSH project based rent assistance, and 294 OHA project-based supportive services slots.
3. Build upon alignments of federal resources to expand funding opportunities for PSH.

#### **Framework:**

1. *Continued reliance on PSH Institute training and technical assistance to ensure successful execution, which requires relationships and formal agreements among developers, service providers, and management entities.*

OHCS is under contract with CSH to launch year-two of the Oregon PSH Institute. They are working to offer this in a revised, remote, format building upon local and national expertise to ensure best practices in remote learning are followed. The applications for project teams will be open this summer and we anticipate the PSH institute will begin early Fall 2020 and be completed in early 2021.

In selecting teams to participate, CSH in partnership with OHCS and OHA, will prioritize culturally responsive service delivery structures, tenant voice, tribal representation, community need, and readiness to proceed.

Any project that receives PSH development funding, PSH project based rent assistance through OHCS, or project-based supportive services funds though OHA, will be required to attend a PSH Institute. While the first round of PSH resources were only offered to the first PSH cohort, our



expectation (reflected in the balance of this framework) is that future resources will be made available more broadly though will give priority to those that have already completed the training and technical assistance. If a project team receives any of these resources and has not already completed a PSH Institute they will receive a spot in the next year's PSH Institute. Those projects choosing to do through our fund offerings, without using these state designated PSH resources, will similarly be prioritized for placement in an institute as timing and space allows.

*2. Leveraging additional development resources to ensure the successful commitment of the remaining 321 spots of PSH project based rent assistance, and 294 OHA project-based supportive services slots.*

With just \$15 million in dedicated PSH development resources available to offer in year-two, staff recommend expanding the opportunities for applicants to request commitment of the remaining 321 spots of PSH project based rent assistance and 294 slots of OHA project-based supportive service commitments. In examining upcoming funding opportunities it would be our hope, pending HSC and OHA approval, to make these resources available in our:

- Veterans development NOFA, planned for this fall
  - o This NOFA has already prioritized serving veterans experiencing homelessness and having units affordable to serve extremely low income households; extending PSH project based rent assistance and services funding would be a logical match.
- 9% LIHTC NOFA, planned for January 2021
  - o This NOFA is based on our Qualified Allocation Plan (QAP); the 2019 update of the QAP established deliberate preference for including PSH units.
- PSH NOFA, planned for January 2021
  - o Discussed below
- Small Project NOFA, planned for summer 2021
  - o This NOFA focuses on small projects and rural areas, with a preference for serving extremely low income households. For some PSH projects, this could be the perfect fit if PSH project based rent assistance and services funding were available.



*3. Build upon alignments of federal resources to expand funding opportunities for PSH.*

The 2021 offering of the \$15 million remaining in dedicated PSH development resources needs to be made available in January 2021 in order to have projects committed in advance of the scheduled 2021 Article XI-Q bond sale. In order to ensure the ability to fund as many projects as possible, staff recommend we pursue updating our strategy for allocating National Housing Trust Fund resources.

The National Housing Trust Fund are resources from HUD specifically dedicated to funding units that serve those households at or below 30% AMI. As PSH units are specifically dedicated toward serving extremely low-income households, this appears to be an easy alignment with the federal program. In the past, we have offered these resources as a stand-alone within our 9% LIHTC NOFA however they were so vastly over-subscribed that this approach was not sustainable. This year, OHCS will be updating our 5 year Consolidated Plan; if HSC supports this leverage opportunity with PSH, staff will be able to include this element in outreach around updates to our programming of federal resources.

On the following page, you can find a draft framework for these dedicated PSH Development Resources.

**Housing Stability Council Feedback:**

At the HSC meeting, staff seek input on the proposed strategy for continuing to move our Statewide Housing Plan PSH priority forward into year-two.

Specifically:

- Above we establish three drivers to address in creating this year-two strategy: do you have any others to add?
  1. Continued commitment to training and technical assistance
  2. Expanding pool of leveraged development resources
  3. Pursuing alignment with federal resources
- Do you have any concerns around offering the PSH project-based rent assistance or services funds through other funding opportunities?
- What additional information would you like to understand before adopting the proposed (or revised) framework below?



Fund Offering	Permanent Supportive Housing (PSH) NOFA	
Development Type	PSH units serving those experiencing Chronic Homelessness in New / Acq/Rehab or Existing Publicly Supported Housing	
Geography	Split between Urban & Rural	
Subsidy Limits	<ul style="list-style-type: none"> <li>- \$250 k per PSH unit;</li> <li>- PSH Project Based Rent Assistance and Services Slots</li> <li>- 4% LIHTC</li> <li>- OAHTC: \$3MM loan per project</li> </ul> <p>Required participation in PSH Institute;</p>	
Scoring Principles	<ul style="list-style-type: none"> <li>- Geographic Diversity; Tribal set-aside</li> <li>- Population targeting</li> <li>- Partnerships to support service to communities of color</li> <li>- Service package developed to meet needs of target populations</li> <li>- Location access and amenities</li> <li>- Financial Viability</li> </ul>	
Equity	<ul style="list-style-type: none"> <li>- Affirmative Fair Housing Marketing</li> <li>- MWESB Construction Workforce Engagement</li> <li>- Resident Services; culturally responsive partnerships</li> <li>- Location Accessibility</li> <li>- Diversity, Equity and Inclusion (DEI) agreement, requirement</li> </ul>	





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Date: August 7, 2020

To: Housing Stability Council Members;  
Margaret Solle Salazar, Executive Director

From: Natasha Detweiler-Daby, Assistant Director, ARH Policy and Planning  
Julie V. Cody, Director, Affordable Rental Housing Division

Re: Affordable Rental Housing COVID-19 Response Fund - Introduction

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**Summary:**

At the August Housing Stability Council (HSC) meeting, staff will be introducing a framework for an Affordable Rental Housing COVID Response Fund (ARH CRF). This fund has been seeded with \$20 million in federal COVID response resources and allocated to this effort by the Oregon Legislature. These resources must be spent by 12/30/2020; so staff are fast tracking this program development. We believe that the legislature may also repurpose the \$5 million in general fund set-aside for the Greater Oregon Accelerator a program included in OHCS' 2019 Legislatively Adopted Budget, which we have currently stepped away from in light of COVID-19. If those resources become available for this effort they will be added to the offering. Our modeling of need shows that the need is greater over time, so we will be tracking to determine the success of this intervention and will be prepared to seek additional resources if they become available to support the need.

Below, we will cover the driver for this effort, public engagement to-date, and provide a draft framework. We seek HSC feedback and recommendations, which will be used to incorporate into a final framework that we will plan to bring to HSC in September 2020.

**Background:**

As we are all aware, the COVID-19 pandemic has launched Oregonians statewide into economic instability as businesses close and priority is placed on adopting practices such as physical distancing to lessen the spread of the virus. As a consequence, households are struggling to pay rent. While rent receipts overall to-date have been higher than initially projected, we are faced in the near term with the end of the statewide Eviction Moratorium on September 30<sup>th</sup>. At that point, households that have not been able to pay rent will have just six months to repay any arrearages.



Rent non-payment does not just impact the tenant, it impacts the project owners. While some market properties charge rents high enough to get by without rent for a period of time, publicly supported Affordable Rental Housing deliberately operates on carefully calculated budgets that ensure the ability to pay debts, to pay staff, bills and overall operate the project. These projects do not have a profit margin adequate to sustain operations once there is a high degree of “economic vacancy” (nonpayment of anticipated rent).

During the time of the Eviction Moratorium, property owners have had to get by while accumulating more and more expenses. As that Eviction Moratorium expires, if the project is unable to absorb the financial blow of non-payment, we risk that project going into foreclosure in addition to facing a tremendous cliff event of evictions due to non-payment. Foreclosed multifamily properties will create ongoing economic hardship in the state through the potential loss of affordable, rent restricted housing units; and tenant evictions destabilize already vulnerable households and exacerbate the homeless crisis. These outcomes are fundamentally in opposition with housing stability and our goals to preserve publicly supported housing.

While many efforts have focused on reaching those tenants needing rent assistance, we are well too aware that the available resources are insufficient to meet the need. Further, at this time, it is not possible to know the full magnitude or character of the impact that COVID-19 will have on the Oregon economy, and its workforce, in order to ensure alignment of rent assistance with those who end up most impacted in the short term crisis and beyond in recovery.

The number one priority is to keep vulnerable Oregonians housed during this crisis and limit the economic burden on them long-term, as well as retaining affordable rental housing stock for future generations. To that end, OHCS has established the Affordable Rental Housing COVID-19 Response Fund to provide short to mid-term loans to affordable housing property owners with the explicit understanding that the loan will be deemed satisfied (repaid) if the property owner satisfies rent arrearages in an amount greater than or equal to the amount of the loan. Making this commitment to secure the vulnerable affordable housing portfolio would help to stabilize those most vulnerable in the short term, as well as setting households up for success by not being saddled with large debts due to rent arrears.

## Engagement

In developing this approach, staff have worked to seek input and guidance from other state housing agencies, Oregon affordable rental housing lenders and investors, and stakeholders.



**August 7, 2020**

Affordable Rental Housing COVID-19 Response Fund

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We had an information session with the Housing Alliance, and are gathering written feedback on draft materials (see attached). In the coming weeks, we hope to circulate an updated draft for comments as well as seek out directed feedback from smaller property owners as well as culturally specific property owners.

We have created the attached framework in response to much of this feedback.

### **Next Steps**

In the attached document the first page provides a high level overview of the ARH CRF program concept. The second page provides additional considerations for items such as set-asides and target populations. We are intent upon applying an Equity and Racial Justice lens to deploying this program, though within the confines of fair housing do not intend to establish that profile based on the demographics of current project residents. Instead, based on stakeholder feedback, we would intend to develop project specific Vulnerability Factors; where projects that have markers of projects with a high degree of anticipated COVID impact are prioritized over those with lesser.

For example: a Vulnerability Factor would place high risk to projects with units set-aside for Agricultural Workers whose COVID related needs have been shown to not have been addressed. Projects with lower rates of project based rent assistance, would be similarly preferenced.

In seeking HSC feedback we are interested in any guidance or direction that would help focus the use of these resources to equitably focus this investment to stabilize projects and tenants.



# AFFORDABLE RENTAL HOUSING

## **DRAFT for Input: COVID Response Fund DRAFT**

<b>Program Intent</b>  <b>DRAFT</b>	The initial objective for the Affordable Rental Housing COVID Response Fund (ARH CRF) resources is to stabilize Affordable Rental Housing project operations with a loan which ensures the ability for the project to continue to operate (pay to operate the project, pay salaries, and debt service etc). The secondary objective of this intervention is to stabilize households living in the affordable rental housing long-term and avoid eviction for non-payment of arrearages after the expiration of the Eviction Moratorium; this will be accomplished by allowing the project loan to be satisfied in exchange for the settlement of outstanding arrearages of a higher dollar value.
<b>What problem is this addressing?</b>  <b>DRAFT</b>	These affordable rental housing projects serve low income Oregonians, and due to COVID-19 are facing higher than sustainable levels of rent non-payment. This missing rental income deteriorates the owners' ability to sustain the operations of the project, including paying any outstanding property debt, making required reserve contributions, and supporting higher cleaning costs in response to COVID-19. These operational loans will allow owners to have resources to cover operational needs during COVID-19, as well as be able to capitalize reserves and provide patient capital for deferred maintenance during COVID-19 recovery. At the same time, with the expiry of Eviction Moratorium, tenants are faced with needing to repay arrearages even though they may still not be in a position to do so. By allowing the loan to be satisfied through forgiveness of a greater dollar value in arrearages, the project is able to continue to operate and the households are stabilized.
<b>How would it work?</b>  <b>DRAFT</b>	For the first \$20 Million in ARH CRF resources: <ul style="list-style-type: none"> <li>- Competitive Application for Project Applications</li> <li>- Must be committed before 12/30/2020; Streamlined Application in September / October.</li> <li>- Funds would be lent to the sponsor / owner organization for the operations of identified participating project</li> <li>- Loan would be scaled based on a percentage (60% / 70% etc) of the total project rent arrearage (for non rent-assisted households) attributed to COVID-19.</li> <li>- Loan terms: <ul style="list-style-type: none"> <li>- Low Interest; balloon repayment</li> <li>- Loan can be repaid <u>OR</u> satisfied through the resolution of rent arrearages (of a higher, agreed upon, dollar value)</li> <li>- Required project-level extension of Eviction Moratorium for COVID related non payment of rent through loan period</li> </ul> </li> </ul>

## QUESTIONS for Input: COVID Response Fund DRAFT

<b>How to Prioritize Resources?</b>	<p><b>What are the considerations that should be used for prioritizing these resources?</b> Some <u>ideas</u> for priorities could be:</p> <ul style="list-style-type: none"> <li>- Projects with higher percentage of rent arrearages.</li> <li>- Projects with higher percentage of existing rent work-out plans in place.</li> <li>- Projects in communities that do not have remaining rent assistance resources available.</li> <li>- Projects with higher percentage of units without rent assistance and fixed income tenants that would be less likely to be impacted by COVID-19 employment challenges.</li> <li>- Projects with a greater “<b>leverage ratio</b>”; that are willing to forgive a greater portion of rent arrearages – to loan amount? (ie: a project that will accept 60 cents for every \$1 dollar in rent they forgive would be given priority over one that requires 90 cents for every \$1 dollar owed in rent)</li> <li>- Other?</li> </ul>
<b>Set-Asides?</b>	<p><b>Should these resources have set-asides and targets?</b> Such as:</p> <ul style="list-style-type: none"> <li>- Based on geography (urban vs rural?)</li> <li>- Project size? (large projects vs small projects?)</li> <li>- Culturally specific or responsive organizations?</li> <li>- Other?</li> </ul>
<b>Leverage Ratio?</b>	<p><b>Should we prescribe, or incentivize through points, specific thresholds for a leverage ratio?</b></p> <ul style="list-style-type: none"> <li>- Leverage ratio is referring to the amount of ARH CRF funds required to satisfy outstanding rent arrearages; a project requiring 60 cents for every dollar in rent satisfied would have a higher leverage ratio than one requiring 80 cents for every dollar.</li> </ul> <p><b>How would that look differently for small versus large projects? Small versus large portfolios...or organizations?</b></p>
<b>Other?</b>	<ul style="list-style-type: none"> <li>- <b>How can we deploy these resources and not dis-incentivize rent payment by any household that is able?</b></li> <li>- <b>How can we ensure those most heavily impacted by COVID which is disproportionately communities of color, are served by these resources?</b></li> <li>- <b>These resources need to be lent to projects by 12/30/2020; through what time period can we expect the tenant arrearages to be resolved if we accept applications in Sept / October?</b></li> </ul>

**SUBMIT ANY WRITTEN FEEDBACK TO [ARH.HCS@oregon.gov](mailto:ARH.HCS@oregon.gov)**



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**Date:** August 7, 2020

**To:** Housing Stability Council Members  
Margaret Salazar, Director

**From:** Leeann Marx, Community Services Block Grant (CSBG) Program Coordinator  
Andrea Bell, Housing Stabilization Director

**Subject:** U.S. Department of Health and Human Services (HHS), Office of Community Services (OCS) CSBG FY 2021-22 State Plan Application

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**Purpose:** **To inform the Housing Stability Council regarding the 2021-22 CSBG State Plan for the State of Oregon**

The draft FY 2021-22 CSBG State Plan can be accessed by clicking [here](#).

**Background:**

The Community Services Block Grant (CSBG) is a federal fund established to alleviate the causes and conditions of poverty in local communities. Oregon Housing and Community Services (OHCS) is the state lead agency designated to administer and pass through 90% of the CSBG funds to eligible entities in Oregon. Ten percent of Oregon's annual award is held by OHCS for administration and discretionary usage, per statutory allowance.

Eligible entities in Oregon that receive CSBG funds include local government and nonprofit community action agencies, and the statewide farmworkers organization. These agencies administer a variety of services to assist low-income Oregonians within their own communities, both rural and urban.

CSBG national goals, that were set in legislation and administered by the Department of Health and Human Services (DHS) and the Office of Community Services (OCS), are:

- Help low-income people increase self-sufficiency
- Improve living conditions for low-income households
- Help low-income people build ownership and pride their communities
- Coordinate local services and providers assisting low-income households
- Help increase Community Action Agencies' (CAA) ability to achieve results



- Help low-income people, especially vulnerable populations, achieve their potential by strengthening families and creating supportive environments.

To achieve these goals, grantees provide services and activities addressing, but not limited to: employment, education, income and asset building, housing, nutrition, daycare, Head Start, healthcare, emergency services, and youth or elderly-based initiatives.

### **State Plan Application Timeline**

State lead agencies are required to submit a one or two-year plan to OCS (Office of Community Services), due September 1, 2020. This plan serves as the application for state CSBG funding; the Oregon CSBG FY 2021-22 State Plan application will be a two-year plan.

State plan applications are required by CSBG Statute to undergo a public hearing and open comment period. The public hearing will be held at OHCS on July 31, 2020 at 1:00 pm and the public comment period will be open and receiving written comments, until 5pm, August 7, 2020. In addition to the draft state plan being posted on the OHCS website two weeks prior to the public hearing, the draft state plan application was also sent out to the Oregon CAA Network for review and feedback.

In preparing the state plan application and the new challenges of the Coronavirus, OHCS provided several options to receive feedback of the state plan. The option selected was for CAPO, the State Association, to review and present the draft to the Executive Network team for feedback.

### **State Plan Application Changes**

The CSBG state plan does not typically change substantially from one year to the next. No significant changes have been made to the 2021-22 CSBG State Plan, however, there will be intentional meetings through the coming year for discussions on updating the allocation formula, which may include an amendment next year.

### **2021-22 CSBG State Plan Highlights:**

- Intentional alignment with OHCS Statewide Housing Plan
- Continuous improvement in data collection processes.
- Increase of Organizational Standards percentages for CAAs.
- Expanded Training and Technical Assistance activities (e.g., board development, ROMA Implementer).





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Date: August 7, 2020

To: Housing Stability Council Members  
Margaret Solle Salazar, Director

From: Andrea Bell, Director of Housing Stabilization Division  
Tim Zimmer, Assistant Director of Energy Services  
David Kaufman, Energy Assistance Coordinator

Re: U.S. Department of Health and Human Services (HHS) Low Income Home Energy Assistance Program (LIHEAP) State Plan

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**Purpose:** To inform the Housing Stability Council regarding the 2021 LIHEAP State Plan for the State of Oregon

### **Background**

The Low Income Home Energy Assistance Program (LIHEAP) provides energy assistance to low-income Oregonians, especially those households with the lowest incomes and the highest home energy need in relation to income. The purpose of this program is to supplement home heating and cooling costs to income eligible households regardless of utility or primary fuel type. LIHEAP is an energy assistance program provided on a first come first served basis. Program services include bill payment assistance, heating and cooling equipment repair and replacement, and energy education.

The U.S. Department of Health and Human Services (HHS) offers applications to states, territories, and tribes to administer LIHEAP. Oregon, in turn, provides grants to non-profit Community Action Agencies (CAA) and county governments throughout the state to provide energy assistance services to their local communities. Oregon distributes the annual LIHEAP funding via a needs-based formula, developed with input from CAPO.

Funding amounts remain uncertain for program year 2021; however, we anticipate a similar award as received for program year 2020 totaling just over \$38 million, not including CARES Act funds or Coronavirus Relief Funds. Last year the program provided assistance to more than 56,000 low-income Oregon households.



### **State Plan Application Timeline**

The 2021 state plan is due to HHS no later than September 1, 2020. The draft state plan will be posted on the OHCS website during the week of July 27, 2020. OHCS staff will be facilitating a virtual public hearing on August 21, 2020 and will be accepting written comments until September 30, 2020. OHCS staff is not anticipating substantial public comment related to the draft plan; however, there may be changes resulting from either public comment or final negotiations with HHS.

### **Partner and Stakeholder Engagement**

Energy Services staff participate in at least four formal meetings with our sub-grantees throughout the year that are specific to energy assistance and weatherization. In addition to those, staff participates in various other meetings throughout the year that involve larger and smaller groups of sub-grantees, partners, utilities, and other stakeholders. Oregon's review process never really ends; we are continuously and collaboratively looking at how to do things better; and how to serve our communities more effectively.

### **State Plan Application Summary**

- Bill payment assistance
  - This includes heating, cooling, and crisis payments. The majority of payments are made directly to a utility or fuel vendor on behalf of a client. In order to qualify, the household must have income at or below 60% of the state median.
- Weatherization Assistance
  - The Low-Income Weatherization Assistance Program (WAP) provides weatherization and energy conservation services at no cost to households at or below 200% of the federal poverty income level. Services provided may include ceiling, wall, and floor insulation; energy-related minor home repairs; energy conservation education; air infiltration reduction; furnace repair and replacement; or heating duct improvements.
- Assurance 16
  - HHS allows a maximum of 5% of LIHEAP funds to be used to provide services that encourage and enable households to reduce their home energy needs and thereby the need for energy assistance. Allowable uses of these funds include needs assessments, budget planning, arrearage management, energy education, energy saving incentives, and supplemental bill payment.

### **Notable Current & Future Energy Assistance Efforts**

1. Energy Assistance Evaluation - Objectives
  - Assess the impact of current state energy assistance programs.
  - Evaluate the service reliability from the state, local, and utility perspectives.
  - Evaluate effectiveness of unique and varying current delivery models in Oregon.
  - Assess the marketing, outreach, and access to state programs.
    - Conduct an equity analysis of Programs by identifying gaps and make recommendations on overcoming identified barriers.



- Identify underserved populations and the barriers to access the Programs.
  - Help to produce significantly higher rates of targeted outreach to underserved communities of color, recommend benchmarks.
2. Energy Services staff in conjunction with APPRISE, has convened a total of six Advisory Committee meetings to share trends to date that we are seeing related to the evaluation. Purpose of these advisory meetings include:
- Seek advisement on evaluation scope, preliminary data, trends, and direction.
  - Assessment of existing energy assistance resources, best practices in program integrity, client services, and outreach strategies.
  - Feedback and dissemination of client survey information including goals, design, sample size, and results. Include lived experience related to both successful applicants and individuals who started an application, but did not complete.
    - Document client experiences with the application and intake process, access to services, program awareness and the need for energy assistance.
    - Minimum of 500 survey client participants through various forms including online survey and telephone interview.
    - Surveys conducted in English, Spanish, Korean, and Mandarin.
  - Planning future briefing to Council members to share preliminary findings and trends.
3. Energy Burden Assessment Tool
- Development of GIS mapping tool that helps us visualize population demographics, race, and energy burden by race detailed by county.
  - Comparative analysis of existing population demographics per county and historical service delivery data by county.
  - Assist Energy Services and delivery partners in our collaborative efforts to target outreach strategies to communities of color and identified underserved populations.
  - This tool will be used in conjunction with the results of the comprehensive Energy Assistance Evaluation to improve outreach strategies to help ensure equitable access to energy services statewide.
4. Issuance of Temporary Eligibility Standards for Energy Assistance Programs
- Respond to realities associated with COVID-19 Emergency Declaration.
  - Update guidance to minimize the spread of the coronavirus and protect the health of clients and service delivery partner staff.
    - Changes to accommodate remote work and reduce in-person contact where feasible.
    - Allow for electronic signatures and/or signature exceptions as necessary.
    - Accept verbal documentation of income and other documentation exceptions where necessary to ensure timely services.



### **State Plan Application Changes**

The state plan does not typically change substantially from one year to the next. This year, however, with the impacts of the coronavirus, we have also made some temporary changes to accommodate contact-less intakes and self-declarations for income. Other differences between the 2020 and 2021 state plans are as follows:

- The maximum crisis payment has been increased from \$500 to \$750
- In response to a question in the state plan about utility moratoriums, we added a comment that most utilities in Oregon have instituted voluntary moratoriums on disconnections for all customers.

### **Housing Stability Council Involvement and Next Steps:**

If there are substantive changes resulting from either public comment or negotiations with HHS, Energy Services staff will be prepared to present the final state plan during a future Housing Stability Council meeting.





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Date: August 7, 2020

To: Housing Stability Council Members  
Margaret Solle Salazar, Executive Director

From: Andrea Bell, Director Housing Stabilization Division  
Hunter Belgard, HMIS Administrator  
Sam Kenney, Senior Homeless Services Policy Analyst

Re: SB5512 Budget Note

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**Purpose: To provide a briefing on SB5512 Budget Note. No HSC decision to be made.**

**Summary and motivation**

In recognition of the need for consistent and accurate data gathering and statewide reporting to inform policy choices regarding homelessness, the Legislature enacted the following Budget Note:

*The Housing and Community Services Department will report to the legislature by June of 2020 on options to implement a statewide homeless management information system (HMIS) that enables clear outcome tracking for homeless individuals. The report will focus on a system implementation that meets federal and state requirements, improves data driven decision making, and aligns with national best practice. Specific items to address include a recommendation on the capabilities of an optimal system, system governance, models from other states that enable data driven decisions, the organization that is best positioned to administer the system, and an assessment of administrative workload options to fund administration.*

**HUD Technical Assistance Provider**

To fulfill SB5512 Budget Note, OHCS partnered with HUD to bring in ICF as HUD approved technical assistance to provide a technical and fiscal recommendations. ICF brings national expertise and an objective lens to the assessment and recommendations for the optimal HMIS system in Oregon. They used varied methods of outreach and research necessary to conduct this assessment and make recommendations. This included interviews, focus groups, and/or surveys of current Oregon HMIS users and stakeholders. ICF has years of experience providing HMIS technical assistance to agencies, governments and programs across Oregon, representing both rural and urban communities.

**HMIS Stakeholder Review Team**

Furthermore, to meet the goals of the Budget Note, OHCS has convened a work group representing key Oregon HMIS stakeholders to ensure local perspective and ownership of this process and the final recommendations. HMIS affects a wide array of stakeholders and the review team consists of HMIS frontline users, CoC HMIS leads, Housing Stability Council members, OHCS staff, VA and HUD staff, as well as members who represent a broad range of perspectives and interests in HMIS work. The review team has worked in close collaboration with the HUD TA provider and



is intended to complement and strengthen their work. They review the work of the HUD TA provider with an intention of strengthening the findings and recommendations to best serve Oregonians experiencing homelessness. The knowledge, perspective, and insight of the stakeholder review team is critical to generate strong recommendations.

### **Budget Note Timeline**

The Stakeholder Review Team, in collaboration with HUD Technical Assistance, will convene in-person each month through July 2020 to generate and endorse recommendations such as:

- Options to implement a statewide homeless management information system
- System administration/governance and funding/workload for effective administration
- Improved alignment with best practices and capabilities of an optimal system
- Opportunities to improve data-driven decision making

### **December 2019 Stakeholder Review Team Meeting**

The Stakeholder Review Team members convened in Portland. Members participated in a review of national best practices and a level setting exercise of how the Oregon HMIS implementation is meeting national best practices. Furthermore, members participated in an activity to generate discussion about an ideal HMIS that serves the wide range of stakeholders represented.

### **January 2020 Stakeholder Review Team Meeting**

The Stakeholder Review Team members convened in Salem. The HUD technical assistance provider, ICF, introduced their draft assessment methodology to support the goals of the Budget Note. They proposed a three-prong assessment approach:

- 1) HMIS Baseline & Best Practices
- 2) HMIS Governance
- 3) Technology & Software. For each of these assessments, ICF plans to use a mix of interviews, focus groups, and surveys to gather information

### **February 2020 Stakeholder Review Team Meeting**

The Stakeholder Review Team members convened via webinar. The webinar consisted of presentations on other HMIS implementations operating in different states. The goal was to provide context, understanding, and examples of the benefits and challenges of other systems. Katie Fallon from the Ohio Housing Finance Agency presented on the Ohio Human Services Data Consortium discussed their data warehouse, how their processes works, and the HMIS steering committee that governs the warehouse work. Gerry Leslie from the Michigan Coalition Against Homelessness (MCAH) presented on Michigan's statewide data system. The Michigan implementation was motivated by connecting medical and housing data and the key to their success is collaboration and data sharing. The SRT team greatly appreciated the insight and time of Katie and Gerry and learned from their implementations and experiences.

### **March 2020 Stakeholder Review Team Meeting**

ICF introduced an *HMIS Working Definitions Document* to ground the SRT's understanding of key concepts and definitions. ICF presented their findings from their Stakeholder Interviews. They provided a summary, examined CoC's decision making and governance structures, and analyzed



the data collection and reporting capabilities of each CoC. Lastly, the SRT participated in an exercise to build on the findings and understand the structure of potential future HMIS implementations and the challenges and benefits of each. The exercise introduced the concept of a Single CoC to an HMIS vendor and Multiple CoC to an HMIS vendor structure. One group was comprised of OHCS staff, a second group was SRT members present in the room, and the third group was SRT members on the webinar. The majority of the selections for the structure to create an optimal system for the state were in line with one another.

### **April 2020 Stakeholder Review Team Meeting**

Between the March and April SRT meetings ICF is continuing their assessments in two key areas. **1) Equity and Racial Justice.** ICF is reaching out to CoCs to have a focused conversation to learn about current plans and practices being implemented, as well as key considerations that should be incorporated into the proposed statewide HMIS system to help achieve these goals. Candidly, we are still learning how to best integrate our priority of Equity and Racial Justice into a body of work that is highly technical in nature. **2) Technical assessment of the current HMIS software, Service Point.** ICF worked with leaders in Oregon's HMIS community to assess the current software and formally verify that it meets the requirements of a HUD approved HMIS. The SRT team looks forward to discussing and engaging with these topics at the upcoming April meeting.

### **June 2020 Stakeholder Review Team Meeting**

Prior to the June SRT meeting ICF completed their recommendation report. This report was shared with the SRT prior to the meeting and the focus of the meeting was to review the budget note process and gather initial feedback on the ICF recommendations. Specifically the SRT focused their discussion on the initial recommendation for the hybrid statewide HMIS modal and the recommended staffing structure. Upon conclusion of the meeting the SRT agreed to convene in late July for a final meeting to provide final feedback on the ICF recommendations and next steps.

### **Summary of recommendations**

Based on the ICF and stakeholder review team process the recommendation is a hybrid multi-CoC statewide HMIS structure model with the following main components:

1. A hybrid multi-CoC HMIS which is administered by OHCS;
2. A data warehouse/repository which has direct data upload capabilities by all CoC implementations;
3. Flexibility for CoCs to choose an alternative method to participate in the statewide HMIS if they do not wish to join the primary multi-CoC HMIS implementation. These alternatives include establishing a single CoC HMIS implementation which uploads data to a statewide HMIS or joining a different multi-CoC implementation, which would upload data into the system; and
4. Statewide governance to oversee how statewide data is used and reported for each participating jurisdiction across the state.



## **Alignment with the Statewide Housing Plan**

**Priority: Equity and Racial Justice.** The HMIS Stakeholder Review Team voted to adopt an additional best practice of, *a commitment to racial justice*, which will serve to focus the review teams work on recommending an HMIS that serves *all* Oregonians. This is represented in the final ICF recommends that racial equity be prioritized as a topic that is further discussed between the HMIS administrator and CoCs participating in the statewide HMIS to better understand needs across the state. Additionally, HMIS directly affects OHCS's ability to utilize data. OHCS/HSS has dramatically changed their reporting process. Now agencies submit less reports which contain more detailed information. More finely disaggregated data allows OHCS and CAA partners to examine their data for racial inequities and will position program staff to implement improvements and corrections. Improved access to client level data position OHCS, CAAs, and partners to provide just and equitable services and a high functioning HMIS is critical to make progress on our equity and racial justice priority.

**Priority: Homelessness.** OHCS and partners are making a coordinated and concerted statewide effort to prevent and end homelessness, with a particular focus on ending unsheltered homelessness of Oregon's children and Veterans. Furthermore, ongoing work on EPIC Outcome Tool implementation and improving data are part and parcel to ending and preventing homelessness. In the December Stakeholder Review Team meeting, collaboration was specifically called out as a key to success by the team. By working to improve HMIS, OHCS is helping all community stakeholders position themselves to quickly identify and engage people at risk of or experiencing homelessness and provide appropriate interventions and services. Through collaboration and improved data, communities increase access to housing and services for folks experiencing homelessness.

**Priority: Rural Communities.** The HMIS Stakeholder Review Team contains multiple members representing rural communities. Additionally, in the January Stakeholder Review Team meeting, the need for greater capacity was specifically called out by rural communities as a top priority. Through a concerted effort to serve rural communities, OHCS has increased technical assistance on HMIS, reporting, and data to provide support to rural communities. Historically rural areas were among the least served by HMIS specific technical assistance, and a more robust HMIS will equip rural communities to implement creative solutions to local challenges.





OREGON HOUSING and  
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Date: July 27, 2020

To: Housing Stability Council  
Margaret Solle Salazar, Executive Director

From: Kate Srinivasan, Senior Research Analyst  
Kim Travis, Housing Integrator

Re: Land Use and Housing, Implementing 2019 Legislation HB 2001 and HB 2003

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The 2019 Legislative Session was a landmark session for housing policy and investment, including the intersection of land use and housing. House Bill 2003 from that Session suggests a transformation of Oregon's approach to planning for housing. Tina Kotek, speaker of the Oregon House of Representatives, said this of the bill during deliberations:

"The state's housing crisis has continued for far too long and demands a bold set of solutions from the Legislature... We must publicly finance more affordable housing across Oregon. We must create more housing choice in exclusively single-family neighborhoods. And we must smooth the way for more construction at the local level. This is the goal of House Bill 2003."

In March 2020, we presented to you the key components of HB 2003 and of OHCS's collaboration with the Department of Land Conservation and Development (DLCD) on this bill in relation to the Statewide Housing Plan (SWHP). ***The purpose of engaging with Housing Stability Council at the August 2020 meeting is to update you on our progress and to collect any input related to our implementation of HB 2003 for consideration in our reporting of the project.***

Goal 10: The intersection of housing and land use in Oregon

Oregon has long been a national leader in planning to accommodate growth. The state mandates local government compliance with 19 statewide planning goals, which include public engagement, planning for natural areas, and planning for adequate land to support economic development and industry growth, among others. Goal 10 on Housing speaks to the need of the land use system to provide for the housing needs of the citizens of the state. It defines the contents and process of a local housing needs analysis which includes 4 parts:

- (1) Housing needs projection, which determines the total need for housing over 20 years
- (2) Buildable lands inventory, which categorizes lands available for various purposes of construction
- (3) Residential land needs analysis, which specifies the amount of land available or needed for accommodating the construction of needed housing



- (4) Measures to accommodate needed housing, which describes the actions that the local jurisdiction will take to plan for the residential housing growth that is needed in those 20 years

### HB 2003

While Oregon's land use planning approach remains a model in the nation, HB 2003 takes aim at some of its shortcomings. In the current system, regulatory authority focuses on land use and land availability – ensuring a sufficient supply of land zoned to accommodate need – without providing sufficient guidance or requirements for the actual production of the housing units needed by income. Local governments each independently lead attempts to understand and plan to accommodate housing need, without recognition of the regional nature of jobs and housing markets. HB 2003 included several new requirements that expand local government responsibilities for planning to meet housing need, including a schedule for regular local housing needs analyses; a new requirement for cities to develop and adopt **Housing Production Strategies** which identify local actions above and beyond zoning that cities will take to support production of and access to needed housing; and the testing of a **Regional Housing Needs Analysis (RHNA)** for the determination of housing need. DLCD is the lead on the first two, and OHCS is the lead on the RHNA.

### Housing Production Strategies

Beginning in December 2019, DLCD convened a Rulemaking Advisory Committee (RAC) to assist with drafting rules for both House Bill 2001, which changed single-family zoning to include “middle housing code”, and HB 2003. This RAC includes a Technical Advisory Committee (TAC) specifically dedicated to reviewing and commenting on DLCD’s work and rulemaking on HB 2003 around Housing Production Strategies. Kim Travis has participated in this TAC on the part of OHCS.

Key points about Housing Production Strategies (HPS):

- HPS will be required for cities over 10,000 as an implementing document for their Housing Needs Assessment (HNA)
- This is a 6-year planning period for Metro cities; and 8-year planning period for non-Metro cities
- Cities will analyze & adopt strategies to produce needed housing for income brackets 0-30%; 30-50%; 50-80%; 80-120%
- Cities will be required to report on progress toward achieving needed housing for income brackets
- **Section 6 of the bill states that the Land Conservation and Development Commission (LCDC), in consultation with OHCS, shall adopt criteria for reviewing and identifying cities that have not adequately achieved results and still have unmet need, and/or severe rent burden.**

HPS Required Components:

1. **Contextualized Housing Needs** describes a city’s housing needs as identified by the most recently adopted Housing Needs Analysis. This section must include other considerations that



describe current and future housing needs in the context of population and market trends. Additionally, because HNAs only calculate housing need by income group, the analysis often poorly estimates the housing needs of those experiencing homelessness. DLCD proposes that cities conduct an analysis of the specific housing needs of the homeless population as part of this component.

2. **Engagement** identifies the process by which the city has engaged, or plans to engage, a diverse set of stakeholders in the development of the Housing Needs Analysis and Housing Production Strategy. This section is separated into two parts 1) engagement of needed housing consumers and 2) engagement of housing producers. This section requires that a city engage underrepresented communities in the Housing Production Strategy process and must describe how the insights gleaned from this engagement have impacted the housing production strategies the city plans to implement.
3. **Strategies to Meet Future Housing Need** outlines the specific tools/actions/policies that the city will implement to facilitate the production of housing. For each strategy, in addition to stating the timeline for adoption and implementation, the city must address how the strategy overcomes patterns of segregation and fosters inclusive communities free from barriers that restrict access to opportunity based on protected characteristics.
4. **Achieving Fair and Equitable Housing Outcomes** describe the actions taken by a city that further housing opportunity in the city. In this section, cities must outline specific or planned practices that link housing to transportation, affirmatively further fair housing, provide access in Opportunity Areas, address the equitable distribution of services, and create opportunities for affordable rental housing and homeownership.
5. **Conclusion** narrates the expected outcome of the proposed housing production strategies. This must include an analysis of the opportunities, challenges, and negative externalities that may result from the collective implementation of the strategies proposed. Specifically, this section must include a description of how the city expects to increase housing options for populations that have a disproportionately high need by answering a series of reflection questions.

DLCD has engaged with a diverse set of stakeholders including advocates for affordable housing to shape this new requirement for cities over 10,000 and have been pushing to ensure cities are adequately planning for needed housing, including Permanent Supportive Housing. Key topics include: data availability, in particular for smaller cities between 10,000-20,000 population and how to incorporate data about people experiencing homelessness that is consistent and reliable. Additional discussion has been about how to potentially align and leverage HUD planning and reporting happening at the state & local levels – such as the Consolidated Plan & Analysis of Impediments to Fair Housing Choice completed by Entitlement Jurisdictions and by OHCS for Balance of State. The meetings have been robust with acknowledgement to address inequities facing communities of color that have perpetuated over time through the land use system. The Land Conservation and Development Commission (LCDC) has indicated they want the HPS *to achieve equitable housing outcomes for those who experience disproportionate housing needs and to consider housing needs of people experiencing homelessness.*

Cities will be asked to look at “access to opportunity” both by providing housing choice in high-opportunity areas, and delivering greater opportunity to communities that have experienced



disinvestment. Cities should also mitigate vulnerability to gentrification and displacement that can result from public investment and redevelopment in historically disinvested areas.

In terms of Section 6 (above) there are still debates at the Technical Advisory Committee about measurement and the ability to enforce actions. HB 2003 provides guidance to evaluate performance including unmet housing needs; percentage of households identified as severely rent burdened; recent housing development, or “other attributes the Commission considers relevant”. LCDC has identified two additional attributes that will likely be part of the sufficiency outline in Section 6 of HB 2003:

1. The city's response to address the housing needs of people experiencing homelessness, and
2. Increased access to housing opportunity including the elimination of barriers to flexible, fair, and equitable housing options.

DLCD's current timeline is driving to have draft rules ready for submission to the Secretary of State on August 28<sup>th</sup>. We appreciate questions and comments from Housing Stability Council members at the meeting on August 7, 2020 or at a separate meeting with interested parties. In planning discussions with DLCD, we hope for engagement between Housing Stability Council and Land Conservation and Development Commission to occur in October as we prepare to submit a report about the Regional Housing Needs Analysis.

#### Regional Housing Needs Analysis

The **Regional Housing Needs Analysis** and accompanying shortage analysis is a one-time exercise, and an opportunity to learn about the pros and cons of applying this regional approach in Oregon, and whether that method could be cost-effectively replicated on a regular basis statewide. OHCS is required to:

- Estimate existing housing stock in each city and region
- Analyze current housing shortage in each city and region
- Identify total housing units needed to accommodate the population over 20 years within each region and city
- Base this on “equitable distribution of publicly supported housing”

In all of the above, the requirement is to classify housing by type and affordability and to complete the analysis by September 1, 2020.

To allow the greatest opportunity to test methodological options, the research team working in contract with ECONorthwest designed a process that included a beta version (version 1) of the methodology and results. This was to allow us to understand how the team's initial methodology choices affected results of calculated housing need, to allow stakeholders to react to an initial draft of a methodology and findings, and to create an opportunity to revisit and improve key assumptions and choices. Those initial results informed a revised version of the RHNA methodology which has been completed. We are currently finalizing the results for all regions and cities using this finalized methodology and are writing a report to accompany those results which will be available in September. Through the Fall of 2020, OHCS



will engage alongside DLCD in gathering stakeholder feedback. OHCS is to summarize the process in a report scheduled for completion by the end of 2020 and due to the legislature March 1, 2021. DLCD is responsible for taking the contents of our report and recommending a specific course of action to the legislature to discontinue, adapt, or continue conducting RHNA's in addition to or in place of local housing needs analyses, in a separate report due March 1, 2021.

#### Key Findings and Recommendations

We are currently in the process of identifying key findings which will result in OHCS's recommendations to DLCD, who will then make the ultimate recommendations to the legislature. Due to condensed timelines associated with the execution of this project, please note these recommendations are currently under discussion and require additional vetting with OHCS staff and leadership. To date, our discussions around this have included:

##### *Whether or not to move forward with the RHNA in Oregon*

Benefits of the RHNA that we've identified relative to current Goal 10 Housing process include:

- Accounts for people experiencing homelessness and underproduction
- Acknowledges the regional nature of housing markets and provides an approach to estimated underproduction and homelessness
- Increases distribution of housing for the lowest end of the income spectrum
- Consistent and transparent approach across all cities, reduced local political influence
- Integrates and supports the current land use planning system, including Housing Production Strategies
- Cost effectiveness
- More realistically estimates need for lowest end of income spectrum, and more equitably distributes that housing need across the region
- Offers data demonstrating housing inequities across demographics in a consistent format
- Introduces importance of jobs-housing balance into housing need calculations

##### *How to address need for publicly supported housing at all levels: local, state, federal*

We are still working on final estimates for the number of publicly supported units that the RHNA suggests will be needed in Oregon over the next 20 years. However, it's clear that a great quantity of new units would need to be affordable to those at 80% MFI and below. In many cases, the lowest income households will need both rental assistance and an affordable unit. Conversations with stakeholders have focused on local concerns that cities alone cannot be held responsible for the development of all of the needed housing and that this responsibility must be shared across federal, state, and local jurisdictions and resources.

##### *Using the RHNA as a key component of an equitable housing implementation system*



OHCS's RHNA includes an analysis of the differences in unmet housing need across varying demographic categories (including race and ethnicity, age, disability status, family size, household type). We found in the RHNA development process a desire to integrate a specific focus on equity into the housing planning system. We believe the RHNA can be used to support this by providing housing demographics analysis for local governments to then address in their local planning efforts, and DLCD is exploring this option as well as the larger goal of how to make equity an integral component of the housing land use system.

*Improve data over time*

The RHNA analysis is limited in part by lack of better data availability on many fronts. California and Washington have some advantages over Oregon in this respect. Our recommendations will include specifications for the need for better data about demographics and housing need, improving the population forecast, and researching a comprehensive understanding of tribal housing needs so that over time the quality of the results of the RHNA will continue to increase.

*Review the RHNA for improvements after each iteration*

It's likely we'll suggest implementing the RHNA on a regular basis, something like every five years, and regularly reviewing it for opportunities for advancement and improvement. This includes ongoing stakeholder engagement and feedback into the process, especially since our timelines for execution of this work limited how much of that broad stakeholder engagement could be done and utilized in this pilot.

*Additional outreach is needed to inform implementation*

Having developed a solid RHNA methodology, there are still many questions left to answer regarding implementation that will benefit from continued outreach through at least Fall-Winter 2020 and likely beyond.

