

Housing Stability Council

MEETING MATERIALS PACKET



Dalles Navigation Center Groundbreaking
The Dalles, Or

July 7, 2023
9:00 a.m. – 1:15 p.m.
Oregon Housing & Community Services
Webinar

Council Members:

Claire Hall, Chair
 Sami Jo Difuntorum
 Mary Ferrell
 Mary Li
 Javier Mena
 Sharon Nickleberry Rogers
 Gerard F. Sandoval, PhD





AGENDA

July 7, 2023 9:00 a.m. – 1:15 p.m.
 Oregon Housing and Community Services
 725 Summer St NE, Salem OR 97301

Webinar Mtg Only

Public [register](#) in advance for this webinar



TIME	TOPIC	SWHP Priority	ACTION
9:00	Meeting Called to Order		Call Roll
9:05	Public Comment		
9:35	Report of the Chair		Briefing
9:45	Report of the Director		Briefing
10:00	Homeownership Division (pg. 04) Keeble Giscombe , Director of Homeownership Division <ul style="list-style-type: none"> Homeownership Development Entity Changes: Jessica MacKinnon, Sr. Homeownership Development Program Analyst 		Decision
10:30	Affordable Rental Housing Division (pg. 08) Natasha Detweiler-Daby , Director of Affordable Rental Housing Division <ul style="list-style-type: none"> Manufactured Park, Combined Pool Funding Recommendation: Ed Brown, Program Analyst; Amy Cole, State Development Resources Manager Peaceful Villa Preservation Project Recommendation: Michael Parkhurst, Senior Preservation Analyst and Roberto Franco, Assistant Director of Development and Production LIFT Rental NOFA Project Recommendations: Becky Isom, LIFT and LAP Senior Program Analyst; Amy Cole, State Development Resources Manager 		Decision
11:30	Break		
11:45	Housing Stabilization Division (pg. 48) Jill Smith , Director of Housing Stabilization Division <ul style="list-style-type: none"> New Training Center & ORMEP: Michelle Cole, Assistant Director of Energy Services; Dan Elliott, Energy Services Policy Analyst 		Briefing
12:45	Government Affairs Division (pg. 68) Nicole Stingh , Assistant Director of Government Affairs Division <ul style="list-style-type: none"> 2023 Legislative Session Outcomes: Nicole Stingh, Assistant Director of Government Affairs Division 		Briefing
1:15	Meeting Adjourned		

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.

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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



DATE: July 7, 2023

TO: Housing Stability Council
Andrea Bell, Executive Director

FROM: Jessica MacKinnon, Senior Homeownership Development Program Analyst
Talía Kahn-Kravis, Operations & Policy Analyst
Kim Freeman, Assistant Director of Homeownership Programs
Keeble Giscombe, Director of Homeownership

SUBJECT: Recommended LIFT and HDIP Entity Changes

Motion: Approve the recommended changes in entity for one project awarded through the 2022 LIFT NOFA and five projects awarded through the 2023 Homeownership Development NOFA.

Summary: The Housing Stability Council awarded funds for the LIFT, LIFT Supplemental, Development Subsidies, and Pre-development and Capacity Building grants on May 5, 2023. Three applicants, accounting for 6 awarded projects in 2022 and 2023, have realized a need to change the entity receiving the award. The Department of Justice has advised that such entity changes must be approved by Housing Stability Council.

Background

The Homeownership Development Notice of Funding Availability (NOFA #2023-3) was released on December 15, 2022, and on May 5, 2023, Housing Stability Council awarded funds for LIFT, LIFT Supplemental, Development Subsidies, and the Pre-development and Capacity Building programs. As OHCS worked with awardees on the due diligence and agreement execution phases of these projects, staff identified a need to alter the entities receiving these awards.

The Department of Justice has advised that to reduce any internal concerns and alleviate the burden on our partners, OHCS should request approval from Housing Stability Council to change the entities that ultimately receive any grants or loans.

Other than the entity name change, the project details will remain the same. The new entities will still be held to the same standards that they were evaluated on and committed to in their applications including: development type and location, affordability, development schedule, cultural responsiveness, and targeted commitment to serving those underrepresented as homeowners in Oregon. Further details on each project are included later in this memo.

The entities requesting changes include the following:

- Woodhaven Community Housing LLC to Thistle & Nest
- Murphy's Crossing LLC to Thistle & Nest
- Wallowa Resources to Working Homes LLC

Recommendations

Awarded Organization	Project	Award Type	Total Award Amount	New Entity
Woodhaven Community Housing LLC	Woodhaven Community Housing 1	2022 LIFT	\$1,916,197	<i>Thistle & Nest</i>
Woodhaven Community Housing LLC	Woodhaven Community Housing 2	2023 LIFT/ LIFT Supplemental	\$8,330,000	<i>Thistle & Nest</i>
Woodhaven Community Housing LLC	City View Part 1	2023 LIFT/ LIFT Supplemental	\$4,726,000	<i>Thistle & Nest</i>
Woodhaven Community Housing LLC	Prineville Townhomes	2023 LIFT/ LIFT Supplemental	\$4,450,600	<i>Thistle & Nest</i>
Murphy's Crossing LLC	Murphy Crossing	2023 LIFT/ LIFT Supplemental	\$5,400,000	<i>Thistle & Nest</i>
Wallowa Resources	Working Homes	2023 PDCB	\$150,000	<i>Working Homes LLC</i>

Woodhaven Community Housing LLC

Woodhaven Community Housing LLC has received four awards for large developments in Central Oregon.

Since 2018, the Homeownership Development NOFA has included for-profit developers as eligible applicants. The program awarded its first for-profit organization in 2022. The first phase of Woodhaven Community Housing was awarded \$1,916,197 in LIFT funding to build 19 units, but as the project moved through the due diligence and legal sufficiency processes, it was found that for-profit organizations were not considered eligible covenant holders under ORS 456.270 and therefore were ultimately ineligible for LIFT.

This project is structured as a condominium, with Woodhaven Community Housing LLC originally planning to receive the award, manage the loan, and ultimately operate the condo structure while their parent company Hive Development served as the general contractor. Fortunately, the organization was already forming Thistle & Nest, a nonprofit organization. The development team was able to restructure internally to have Thistle and Nest serve as the developer, Hive Development as the general contractor, and Woodhaven LLC as the condo lease holder, which would allow them to qualify for the loan they were awarded.

This discussion happened while the 2023 NOFA was already underway, so their newest applications reflected the same issues. To prevent any additional issues and delays to the partner, the Department of Justice recommended staff seek Housing Stability Council approval for the entity change in advance of any due diligence or legal sufficiency analysis.

The Woodhaven Community Housing 2 project was awarded \$6,125,000 in LIFT and \$2,205,000 in LIFT Supplemental to develop 49 homes in Bend. It's the second phase of a larger 125-unit affordable, deed-restricted development with the first phase also having been funded through LIFT. This is part of a much larger project where Woodhaven has a sales agreement to purchase three additional similarly sized properties with the full development designed by a civil engineer to include multifamily, shared-wall townhome-style duplex units with a condominium overlay. This site will feature energy efficient and solar capabilities, materials and finishes chosen to last 30+ years, and a central space to encourage and facilitate community-building. This development has committed to outreach and marketing that will match, if not exceed, the ratio of underserved households relative to the greater population in Bend.

The City View Part 1 project was awarded \$2,380,000 in LIFT and \$2,346,000 in LIFT Supplemental to develop 34 homes in Madras. This is the first phase of a development next to the Yarrow housing development in Madras designed to include 102 multi-family, shared-wall townhome-style duplex units using a condominium overlay. Construction will incorporate energy efficient features, solar, and materials and finishes chosen to last 30+ years. The site includes a half-acre park to encourage a community-centric spirit and provides for a variety of household sizes that accommodate multi-generational living, which is common in the Latino Community.

The Prineville Townhomes project was awarded \$1,960,000 in LIFT and \$2,490,600 in LIFT Supplemental to develop 28 townhomes in Prineville's Iron Horse development. This parcel will include single family homes and a senior living "lodge" with multi-family, shared-wall townhome-style duplex units with a condominium overlay. Through marketing and outreach to historically underserved communities, this development will also match, if not exceed, the ratio of underserved households relative to the greater population in the Prineville area.

Murphy's Crossing LLC

Murphy's crossing LLC received \$3,600,000 in LIFT and \$1,800,000 in LIFT Supplemental to construct 30 homes in Bend. Murphy's Crossing LLC is a separate entity from Hive, Woodhaven, and Thistle & Nest but worked with Hive as a consultant on the development and submission for LIFT funds and planned to hire Hive Development LLC as the general contractor to build affordable owner-occupied homes in the same style as Woodhaven's multi-family, shared-wall townhome-style duplex units with a condominium overlay. The site will be designed with front doors facing a communal space to encourage building and maintaining community.

In light of the changes disqualifying for-profit entities, the partners have agreed to allow Thistle & Nest to serve as the Developer and hold the loan and land while Murphy's Crossing LLC will serve as the condo leaseholder.

Wallowa Resources

Wallowa Resources is a community-based organization in northeast Oregon founded in 1996 focusing on developing a strong "Stewardship Economy" in the rural communities they serve through land stewardship, job creation, education, and advocacy. They are seeking to expand their services into much-needed affordable workforce housing.

Wallowa Resources has a 21-acre development site under contract in Joseph, OR and was awarded \$150,000 in HDIP (Pre-development and Capacity Building) to build the organizational capacity needed to develop this site into workforce housing. The award would cover staff costs for one employee and early pre-development costs for the first phase of the site, which would include 10-20 homes for purchase for households earning between 60% and 120% AMI. This additional capacity will also allow them to conduct outreach to underserved communities experiencing lower homeownership rates in Wallowa County in collaboration with the Community Action Agency in Enterprise, OR.

As part of the project, Wallowa Resources has created a new nonprofit subsidiary called Working Homes LLC, which is designed to fill the gap in affordable housing developers in Wallowa County. This new entity will allow the organization to better manage their assets and finances and to better serve their communities through staff, program, and board diversity. Though the application was submitted through the established Wallowa Resources, the project was to hire staff and establish Working Homes LLC.

Considering the potential delays and advisement of the Department of Justice regarding the other cases, staff is seeking Housing Stability Council approval for this project to reduce risk and prevent delays.

Future Considerations

Moving forward, all NOFA offerings and other documentation from the department will correct the listing of eligible entities for the LIFT program and give more clear guidance to partners to submit applications from the qualified entity or final entity that will be receiving funding.



**OREGON HOUSING *and*
COMMUNITY SERVICES**

725 SUMMER STREET NE, SUITE B | SALEM, OR 97301
503-986-2000 | www.oregon.gov/OHCS

Date: July 7, 2023

To: Housing Stability Council Members;
Andrea Bell, Executive Director

From: Edward Brown, Program Analyst
Amy Cole, State Development Resources Manager
Roberto Franco, Assistant Director, Development Resources and Production
Natasha Detweiler-Daby, Director, Affordable Rental Housing

Re: Preservation of Manufactured Dwelling Parks

Motion: Approve the Preservation of Manufactured Dwelling Parks (PMDP) grant recommendation for the Housing Authority of Jackson County in an amount up to and not to exceed \$11,355,917 to Royal Oaks Mobile Manor, subject to the grantee meeting OHCS underwriting and closing criteria including documentation satisfactory to OHCS and legal counsel.

At the upcoming Housing Stability Council meeting, we are presenting a Preservation of Manufactured Dwelling Parks (PMDP) grant recommendation for Council approval. The project was submitted via the Preservation Pool Open Application process approved by Council as part of the 21-23 Funding Calendar and laid out in further detail in the Combined Pools Application Instructions document. Detailed information regarding the project can be found in the summary following this cover memo.

Preservation Pool Application Process & Timing:

Housing Stability Council approved \$25 MM in General Housing Account Program funds for PMDP in the 2022-2023 Affordable Rental Housing Funding Calendar and Frameworks at the December 3, 2021 meeting. That allocation was made available through an open application process where projects can apply for park preservation funding and have their requests reviewed on a rolling basis.

The Preservation Pool is part of the Combined Pools Application process which re-opened on January 11, 2023. It will remain open until December 14, 2023 or until funding is exhausted. If



approved, this project will reserve the remainder of PMDP funds available in 2023. The PMDP Funds have a 60-year affordability period.

Project	Available	Request	Remaining	# of Spaces
Royal Oaks Mobile Manor	\$11,355,917	\$11,355,917	\$0	118



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SUMMARY

Project Name:	Royal Oaks Mobile Manor		
City:	Medford	County:	Jackson
Sponsor Name:	Housing Authority of Jackson County		
Urban/Rural:	n/a	Total Rental Spaces	118
# Rent Assisted Units:	n/a	Units by Size & Affordability:	60% of spaces 80% AMI
Funding Request		Funding Use	
GHAP Funds:	\$11,355,917	Acquisition	\$6,000,000
		Construction	\$16,230,107
		Development	\$3,594,093
		Total	\$25,824,200

PROJECT DETAILS

Project Description:	<p>Royal Oaks Mobile Manor was a manufactured home park, built in the 1950s, with 144 homes. The park was devastated by the 2020 Almeda Fire. Only six homes survived the fire. Currently only two of those homes are occupied and the residents will be provided the option to move into one of the new modular homes. The Housing Authority of Jackson County (HAJC) purchased the site with a bridge loan through the OHCS Disaster Recovery and Resiliency section. The funding from the PMDP program will repay the bridge loan with a long term grant and will pay for part of the infrastructure improvements.</p> <p>HAJC is redeveloping the park with 118 new modular homes in partnership with OHCS. Construction of 118 modular homes has been completed for placement in the park. HAJC will develop and operate the park. Redevelopment of the park requires complete replacement of all infrastructure and systems as well as dirt removal and replacement. Park development includes new utility infrastructure, driveway, parking, landscaping, carports and foundations for premanufactured, modular homes. Park redevelopment also includes a new community building, playground and excess visitor parking. The park will be targeted to fire survivors</p>
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Royal Oaks Mobile Manor – Housing Stability Council Preservation of Manufactured Dwelling Parks Funding Recommendation

	who lost a manufactured home in the fire. Priority will be given to former residents of Royal Oaks.
Reaching Underserved Communities:	The Housing Authority has engaged with Jackson County's Community Action Agency, ACCESS, and will engage with culturally specific agencies, including Northwest Seasonal Workers Association and Coalicion Fortaleza to ensure equitable access to available housing units. ACCESS is providing outreach, housing navigation, and homeowner readiness services to fire survivors and will provide the referral services to the Authority when the park is complete and ready for leasing.
MWESB Target:	The Royal Oaks Mobil Manor MWESB goal is a minimum of 20%. This individual participation rate is based on the total construction costs factored by availability. The total hard cost of construction is \$14,425,000. Twenty percent is \$2,885,000. The scopes of work that would possibly have MWESB/COBID Certified firms bidding would include roofing, plumbing, painting, cleaning, and landscaping. These large contracts could result in meeting or exceeding the 20% goal.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"> • Affordable Rental Housing • Homeownership • Rural Communities
This development conforms to all OHCS underwriting standards.	





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Date: July 7, 2023

To: Housing Stability Council Members
Andrea Bell, Executive Director

From: Michael Parkhurst, Preservation Program Manager
Roberto Franco, Assistant Director, Development Resources and Production
Natasha Detweiler-Daby, Director, Affordable Rental Housing

Re: Preservation NOFA Funding Recommendations

Motion: Approve the Preservation funding recommendations for the Peaceful Villa, \$8,750,000 in Preservation funds and \$10,000,000 in GHAP, up to \$30,000,000 loan amount for OAHTC

Summary

At the upcoming Housing Stability Council meeting, we will be presenting one recommendation for funding under the Affordable Rental Housing Preservation Notice of Funding Availability (NOFA #2022-7). This memo provides a high-level summary of the project and explains why it was not included with other Preservation recommendations brought to the Housing Stability Council in April 2023.

More detailed information regarding the project can be found in the summary following this cover memo.

Background:

At the April 2023 Council meeting four projects (out of twelve that were received and reviewed under NOFA 2022-7) were recommended and received approval for funding.

Prompted by NOFA debrief conversations with applicants whose projects were not recommended for funding, a few scoring errors were identified. Once these scoring updates were implemented, staff identified that the updated scores would have materially impacted the project recommendations for one project. Once scored correctly, Home Forward's application



for Peaceful Villa would have been the highest scoring project in the urban set-aside. In order to remedy this error, staff are recommending that we use the remaining resources that had been set-aside for this resource offering to be reserved for this project and be brought forward in this funding recommendation.

We apologize for the identified scoring challenges and believe that updated protocol in launching future fund offerings will reduce scoring errors moving forward. Notably, when the other scoring corrections were made and applied to all projects in the applicant pool there were minor scoring updates however no other projects gained enough points to have changed the prior funding recommendations, in particular given the oversubscription of the 4% / Private Activity Bond (PAB) resource.

The 2022 Preservation NOFA released on September 30, 2022, and closed in January of 2023 offered \$62.5 million in Preservation funds, up to \$60 million in Private Activity Bonds, and up to \$10 million in General Housing Account Program (GHAP). The GHAP funds were restricted to projects adding net-new units. In addition, OHCS indicated that Oregon Affordable Housing Tax Credits (OAHTC) could be included in requests.

Peaceful Villa meets two of the five NOFA eligibility criteria to be considered for funding:

- The project includes Public Housing units undergoing a preservation transaction involving comprehensive recapitalization, including those converting to HUD PBRA under the Rental Assistance Demonstration (RAD) program
- The property is at risk of loss due to physical conditions documenting a need for substantial critical repairs

The NOFA allowed for one or more of the five criteria to be met as eligibility for funding. Additionally, Peaceful Villa and the funding recommendation meet equity considerations and statewide housing plan set forth in the 2022 Preservation NOFA as further described in the Project Summary.

Funding Recommendation:

Project Name	County	Total Units	Sponsor
Peaceful Villa	Multnomah	166 (96 net new units)	Home Forward
Total		166	



Peaceful Villa is also eligible to apply for 4% LIHTC and PABs. Home Forward will be soliciting those funds in a separate process and allocation OHCS will make available in the fall of 2023. Those resources and these state reservations will allow Home Forward to close its financing and start the re-development work in 2024.

All projects being recommended are furthering OHCS's equity and racial justice goals. The table on the following page shows the ERJ profile for the project and Home Forward as the developer.

EQUITY & RACIAL JUSTICE (ERJ) Project Status

Project Name: Peaceful Villa

Developer Name: Home Forward

This project meets the funding framework criteria adopted by Housing Stability Council for this resource, including all applicable Threshold Requirements below:

Diversity Equity & Inclusion (DEI) Agreement Signed

Affirmative Fair Housing Marketing Plan in Place

MWESB Strategic Outreach Plan in Place

Tenant Demographic Reporting

ERJ Alignment Area	Project Status
<u>Development Team</u>	
Development Team Structure	Non-Culturally Specific Non-Profit Organization
Development Team Leadership and Staff Representation	Some BIPOC Leadership and Staff
<u>Ownership</u>	
Ownership Structure	Not culturally specific or responsive owner
Ownership Leadership/Staff Representation	Some BIPOC Leadership and Staff
Ownership Partnerships	No partnerships in ownership structure with Culturally Specific or Responsive Organization(s)
Ownership MOUs	Do not have an MOU
<u>Property Management</u>	
Property Management Structure	Culturally Responsive Property Manager
Property Management Leadership/Staff Representation	Some BIPOC Leadership and Staff
Property Management Partnerships	Partnerships with Culturally Specific Organization(s)
Property Management MOUs	Have an MOU with CSO
<u>Service Provider(s)</u>	
Service Providers Structure	Culturally Specific service provider(s)
Service Providers Leadership/Staff Representation	Some BIPOC Leadership and Staff
Service providers MOUs	Have an MOU with CSO
<u>Marketing</u>	
Marketing Partnerships	Culturally competent marketing strategies include CSO partnership
Marketing Partnerships MOU	Have an MOU with CSO
<u>MWESB</u>	
MWESB Commitments	30% target
MWESB Performance	Has Met/Exceeded





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SUMMARY			
Project Name:	Peaceful Villa		
City:	Portland	County:	Multnomah
Sponsor Name:	Home Forward		
Urban/Rural :	Urban	Total Units:	166
		Total Affordable Units:	166
# Rent Assisted Units:	166 PBV	Units by Size & Affordability:	63 1br @ 60% 53 2br @ 60% 34 3br @ 60% 4 4br @ 60% 12 Studios @ 60%
Affordability Term(s):	Preservation: 60 years GHAP: 60 years OAHTC: 20 years		
Funding Request		Funding Use	
Preservation	\$8,750,000	Acquisition	\$ 0.0
GHAP	\$10,000,000	Construction	\$69,823,138
OAHTC	\$30,000,000	Development	\$30,879,112
4% LIHTC:	(Pending a 2024 allocation)	Total:	\$100,702,250
Conduit Bonds	(Pending a 2024 allocation)		

PROJECT DETAILS	
Project Description:	Peaceful Villa is a proposed re-development of an existing housing site, replacing 70 older units and adding an additional 96, for a total of 166 units. It creates the opportunity to use resources more efficiently by creating new and more efficient units rather than spending scarce resources on rehab and remodeling for aging and obsolete buildings originally built in the 1940s. Furthermore, the redevelopment will build on partnerships with organizations to serve populations still facing limited access to housing. Immigration and Refugee Community Organization (IRCO) will become a partner and half of the units will be made available to eligible IRCO-sponsored households., Home Forward will provide additional project based vouchers to fully subsidize all 166 proposed new units.

	<p>The redevelopment of Peaceful Villa’s responds to community input gathered from neighbors and current residents during Community Advisory Committee (CAC) meetings. Among the key features to be included are community garden plots, an ADA-accessible playground, a central community room with space for gathering, cooking, and dining, an indoor children’s playroom, a computer room, on-site property management and resident services offices, conference rooms, air conditioning in all units, indoor bike storage, and on-site laundry rooms.</p> <p>The financing for the project will include an allocation of Private Activity Bonds (PAB) and low-income housing tax credits planned for 2024. Home Forward is eligible for these resources, for this housing authority owned project, and will apply at the next offering of 4% LIHTC and PAB funding. State recommended resources provide needed leverage to attract these private resources.</p>
Reaching Underserved Communities:	<p>20% of the current resident population at Peaceful Villa identify as people of color, and 65% of the current households include one or more persons with disabilities. With 96 new units coming online, the post-construction population is expected to include as many as 50% people of color, based on recent Home Forward lease ups.</p>
Partnerships to Serve Communities of Color:	<p>Home Forward is a culturally-responsive organization and developer, with programs, services, and communication intentionally designed to serve diverse populations. The organization’s equity statement commits it in the present to lead and serve with racial equity. To deepen and manifest this commitment in this project, Home Forward will partner and provide special focus in housing eligible households that IRCO serves.</p> <p>Home Forward will provide property management at Peaceful Villa. The partnership with IRCO will enhance the outreach and marketing of units to immigrants and refugees in the areas as well as to other organizations working with communities of color.</p> <p>In reaching and supporting BIPOC households at Peaceful Villa, IRCO will provide on-site support to the future tenants, in addition to those Home Forward incorporates in their housing development.</p> <p>Specifically, IRCO will support immigrants and refugees that will call Peaceful Villa home in several areas including:</p> <ul style="list-style-type: none"> • Removing barriers to economic self-sufficiency • Obtaining vocational training • Gaining English language skills • Accessing Early childhood and parenting education • Supporting youth academic achievement
MWESB Target:	<p>Peaceful Villa is located in region 1 of the OHCS MWESB participation matrix with an identified goal of 30%. The development team for Peaceful Villa commits to meeting the MWESB goal. The General contractor, LMC, is on a multiyear journey to weave equity diversity and inclusion in its operations. Almost half of its workforce are women and people of color, and some of the key positions in the organization such as senior superintendents, foreman, engineers and carpenters are also held by women and people of color.</p>

Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"> • Affordable Rental Housing • Equity and Racial Justice
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This development will need to conform to all OHCS underwriting standards. The primary risk is with the current construction environment relating to cost escalations and subcontractor labor. Enough contingency/escalation was built into the construction budget to mitigate risk of inflation.

Renderings of the proposed new buildings (courtesy of Home Forward and Bora Architects):



VIEW FROM CLINTON STREET



COURTYARD VIEW



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Date: July 7, 2023

To: Housing Stability Council Members
Andrea Bell, Executive Director

From: Rebecca Isom, Senior LIFT Program Analyst
Amy Cole, State Development Resources Manager
Roberto Franco, Assistant Director, Development Resources and Production
Natasha Detweiler-Daby, Director, Affordable Rental Housing

Re: 2023 LIFT Rental NOFA Funding Recommendations

Motion: Approve the LIFT funding recommendations for the following projects:

- College View Apartments in Bend, \$8,300,000 in LIFT funds
- Depoe Bay Townhomes in Depoe Bay, \$2,300,000 in LIFT funds
- Estacada Apartments Phase II in Estacada, \$11,880,000 in LIFT funds
- Ollie Court in Eugene, \$11,254,000 in LIFT funds
- Pacific Flats in Phoenix, \$13,515,000 in LIFT funds
- Phoenix Corner in Phoenix, \$15,300,000 in LIFT funds
- Rand Road Affordable Housing in Hood River, \$15,100,000 in LIFT funds
- Rivergreen Apartments Phase II in Corvallis, \$5,580,000 in LIFT funds
- Salem Apartments in Salem, \$17,850,000 in LIFT funds
- Unicorn Bed in Portland, \$2,320,500 in LIFT funds

Summary

At the upcoming Housing Stability Council meeting, we will be presenting the LIFT Rental funding recommendations to Council. These recommendations are based on the policies laid out in the LIFT program manual, with adjustments to the regional set-asides as approved by the Housing Stability Council in January 2023.

In this memo, we are providing you with a high-level summary of the recommended projects; more detailed information regarding each project can be found in the 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.



NOFA Applications & Scoring:

Of the \$300 million in LIFT funds allocated by the 2021 Legislature, 80% (\$240M) was set-aside for rental development during the 21-23 biennium. Following adjustments of available resources (including \$19.28M was allocated to METRO Regional Government in May of 2022 to fill gaps in eligible projects receiving Metro bond funding, and a Housing Stability Council approval of a reallocation of returned funds in January 2023), a total of \$106,915,880 was offered through the 2023 LIFT NOFA.

The 2023 LIFT Rental NOFA, which was released on January 18, 2023 set-aside 55% (\$58,355,800) for projects using LIFT Only and 45% of the 2023 resources (\$48,560,000) to be used with 4% Low Income Housing Tax Credits (LIHTC). The funding calendar identified \$110 million in Private Activity Bonds (PAB) to generate the 4% LIHTC as leverage for this fund offering.

Each funding pathway had soft-set asides of 50% for rural communities, and 30% for urban communities. The LIFT Only pathway included \$5M for projects located in the three Portland METRO counties (Clackamas, Multnomah, & Washington Counties). Projects were eligible for up to 5 points depending on if they had a Qualified Culturally Specific Organization in the development team.

Since 2021, projects located in the Federally Declared Disaster Areas for the 2020 Labor Day Wildfires have been eligible for up to 5 bonus points. This is the last LIFT offering that will include these bonus points. More information regarding Federally Declared Disaster Areas and the scoring structure found [here](#).

Five projects submitted to the LIFT Rental NOFA received bonus points for being in a wildfire affected area, while six projects received points for having a Qualified Culturally Specific Organization on the development team in either a sole developer/owner or co-developer role.

Applications

In all, 23 applications were received, requesting a total of over \$221.6 million in LIFT funds.

Six applications were submitted under the LIFT Only funding path for a total of \$29.2 million, with two proposals in urban communities, two proposals in rural communities, and two proposals submitted for development in the Portland Metro Counties.



Seventeen applications were submitted with 4% LIHTC/PAB requests totaling over \$199.06 million in LIFT funding requests. Requests totaled approximately \$80.99 million for projects serving urban communities and over \$118.61 million for projects serving rural communities.

Applications were reviewed for completeness, and had to meet minimum threshold requirements in order to qualify for scoring by internal and external scoring committees on the following factors:

- Readiness to Proceed / Financial Viability / Development Capacity: 23 points
- Service to Communities of Color / Innovation & Replicability / MWESB / Use of Affordable Rents / Family-sized units / Qualified Culturally Specific Organization: 56 points
- Low Subsidy / Low Construction Costs: 21 points

All but three proposals met threshold requirements and were scored. Of the 20 proposals that were scored, all but two met the minimum score of 60 points and were eligible to be considered for funding.

Funding Recommendation:

We are recommending a LIFT funding reservation for ten projects. All together, these projects will create 646 units of new affordable housing in communities across the state. The recommendations are for awards totaling approximately \$103.4 million. This will leave approximately \$3.52M in Article XI-Q bonds unobligated for the 2023 LIFT Rental NOFA. This is not enough to fund another project and can be added to the 2024 LIFT offering or could be used to address funding gaps in pipeline projects, if needed.

Projects Serving Urban Communities

Project Name	County	Total Units	Sponsor	LIFT Only or LIFT with 4%/PAB?
College View Apartments	Deschutes	59	Housing Works	LIFT with 4%/PAB
Ollie Court	Lane	81	Homes for Good Housing Agency	LIFT with 4%/PAB
Rivergreen Apartments Phase II	Benton	24	Green Light Development	LIFT Only
Salem Apartments	Marion	120	Green Light Development & Seed of Faith Ministries*	LIFT with 4%/PAB
Unicorn Bed	Multnomah	13	Guerilla Development & Self Enhancement Inc.*	LIFT Only
Total		297		

Projects Serving Rural Communities

Project Name	County	Total Units	Sponsor	LIFT Only or 4%/PAB?
Depoe Bay Townhomes	Lincoln	12	Housing Authority of Lincoln County & KemperCo	LIFT Only
Estacada Apartments Phase II**	Clackamas	48	Home First Development	LIFT Only
Pacific Flats	Jackson	72	Commonwealth Dev Corp of America & Natives of One Wind Indigenous Alliance*	LIFT with 4%/PAB
Phoenix Corner	Jackson	88	Stewardship Development LLC & Oregon Human Development Corporation*	LIFT with 4%/PAB
Rand Road Affordable Housing	Hood River	129	CDP & Columbia Cascade Housing Corp	LIFT with 4%/PAB
Total		349		

* Indicates Qualified Culturally Specific Organization

** Submitted under Portland Metro Counties LIFT Only Set-aside

See project summaries following this memo for additional information.



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 to better achieve LIFT policy priorities.

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

- **Partnership with METRO regarding Private Activity Bonds (PAB):** Due to the current scarcity of PAB, this year OHCS agreed to a combined funding pathway for projects awarded funds through the Metro Housing Bond. This reduced the amount of PAB set-aside for new LIFT projects from \$170M to \$110M.
- **Qualified Culturally Specific Organization Development Team Points:** As mentioned previously, the Culturally Specific Organization / Tribal-led Organizations set-aside was replaced with up to 5 points for development teams that included a Qualified Culturally Specific Organization (QCSO) as either a sole developer, co-sponsor, or as part of the ownership of projects. In this round six projects applied and provided supporting documentation to qualify for these points. One project has a QCSO as the sole developer/owner and four of the recommended projects have QCSOs as a co-developer, or co-owner.

After scoring this round of proposals, two things became clear:

- **Culturally Specific Organizations and Scores Prioritizing Lower Subsidies:** Culturally Specific Organizations often need to request the maximum of LIFT subsidy to make a project work financially. In urban areas, this can mean that the project proposal does not score high enough to be funded. In the future, we will work to restructure scoring so that CSO sponsored projects are not penalized for requesting maximum subsidy.
- **LIFT Program & Policy Goals / Ongoing PAB Constraint:** With the expectation of additional LIFT funds coming from the Legislature in the next biennium, the interest level in LIFT funding was high this year. Despite that interest, and the continuing constraint around PAB, the LIFT Only set-aside was undersubscribed. Staff is working to move to a different model of fund offerings in the future, which could consolidate LIFT with other types of funding. This would make it easier for LIFT Only projects to leverage additional funding for smaller projects.

Equity Considerations

All applications were required to sign an organizational diversity, equity, and inclusion (DEI) agreement as part of the application process, set a participation goal for soliciting and using MWESB contractors, and all projects, in both rural and urban areas, were required to score a minimum number of points in the service to communities of color criteria of the NOFA to be considered for funding.

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 its concentration on creation of housing opportunities for historically underserved populations, MWESB contracting, and DEI agreements, the LIFT Rental program and resulting housing meet the following Statewide Housing Plan priorities:

- Affordable Rental Housing: LIFT adds new affordable rental units to the affordable housing stock.
- Rural Communities: LIFT has a soft 50% set-aside for rural developments.
- Equity and Racial Justice: LIFT requires that all projects have detailed specific actions to engage with, work with, and learn from communities of color, all sponsors sign a diversity, equity, and inclusion agreement, and commit to a specific goal for contracting with MWESB organizations.



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SUMMARY

Project Name:	College View Apartments		
City:	Bend	County:	Deschutes
Sponsor Name:	Housing Works		
Urban/Rural:	Urban	Total Units:	59
# Rent Assisted Units:	8 units total, including: 4 2-BDRM 4 3-BDRM	Units by Size & Affordability:	11 1-BDRM @ 60% AMI 36 2-BDRM @ 60% AMI 12 3-BDRM @ 60% AMI
Funding Request		Funding Use	
LIFT Request:	\$8,300,000	Acquisition	\$250,000
Expected 4% LIHTC Annual:	\$882,189	Construction	\$17,459,341
OAHTC Loan Amount:	\$5,000,000	Development	\$5,816,899
Expected Conduit Bond Request:	up to \$12,225,000	Total:	\$23,526,240

PROJECT DETAILS

Project Description:	<p>College View Apartments is a new construction rental development located across the street from the Oregon State University Cascades Campus in Bend. Consisting of two three-story walk-up residential buildings, the site design includes community amenities: a community room, exercise room, laundry facilities, and a rental office, as well as outdoor amenities such as a playground, parking space (with 16 EV ready parking stations), and a walking path. Individual unit amenities include a heat pump, through wall air conditioning, a dishwasher, microwave, patio or balcony, and in-unit washer/dryers.</p> <p>A neighboring parcel will be developed into an affordable homeownership community land trust model with Rooted Homes, FKA KOR Community Land Trust. Construction is anticipated to begin in July 2024.</p>
Partnerships to Serve Communities of Color:	<p>Housing Works (HW) originally signed a culturally relevant services agreement with Latino Community Association (LCA), a culturally relevant organization located in Bend, in 2019 for translation services & assistance in outreach for housing opportunities, as well as formalizing their partnership to serve the Latinx community. In 2023, the agreement was amended to include consultation about the design & development of new affordable housing opportunities throughout the Central Oregon Region. Through this agreement,</p>



College View Apartments – Housing Stability Council

	<p>LCA has a dedicated Housing Navigator that works with HW staff to educate and identify potential barriers that may arise for potential tenants who are looking for housing through the Housing Choice Voucher Program, USDA RD Agricultural Workforce Housing Program, and the LIHTC Program.</p> <p>Additional resident services will be provided by Cornerstone Community Housing, which will be programed upon receipt of initial lease-up survey results.</p>
Reaching Underserved Communities:	<p>LCA was founded in 2000 and has been serving Crook, Deschutes, and Jefferson County Latinx community members ever since. HW, the local housing authority for the same three counties for over 40 years, will provide training for LCA staff regarding the elements needed to successfully apply and pass screening for both the LIHTC Program and Project Based Vouchers. By training LCA staff on the process, future tenants will be able to have assistance through the document gathering phase and will be given a ‘warm hand-off’ from the LCA Housing Navigator to a Spanish-speaking HW staff member. HW and LCA will also collaborate on the creation of video content in Spanish, with LCA advising HW on style, and providing Spanish speaking on-camera talent and/or voice overs.</p>
MWESB Target:	<p>Housing Works has committed to achieving 25% MWESB/SDVBE owned subcontractors with their general contractor.</p>
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"> • Equity and Racial Justice • Affordable Rental Housing
<p>The LIFT program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement, and engage MWESB organizations.</p>	
<p>This development will need to conform to all OHCS underwriting standards. The primary risk is with the current construction environment relating to cost escalations, subcontractor labor, and interest rate increases. Enough contingency/escalation was built into the construction budget to mitigate risk of inflation.</p>	



Rendering of College View Apartments





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SUMMARY

Project Name:	Depoe Bay Townhomes		
City:	Depoe Bay	County:	Lincoln
Sponsor Name:	Housing Authority of Lincoln County & KemperCo, LLC		
Urban/Rural:	Rural	Total Units:	12
# Rent Assisted Units:	3 units	Units by Size & Affordability:	2 2-BDRM @ 30% AMI 10 2-BDRM @ 60% AMI
Funding Request		Funding Use	
LIFT Request:	\$2,300,000	Acquisition	\$352,158
		Construction	\$4,491,031
		Development	\$836,811
		Total:	\$5,680,000

PROJECT DETAILS

Project Description:	Depoe Bay Townhomes is a new construction rental development for wildfire survivors who lost their homes in the Labor Day fires of 2020. The 12 two-story townhome apartments be housed in six duplex-style buildings located on 2 acres in Depoe Bay. The site design includes parking (with 1 EV ready parking station). Individual unit amenities include a heat pump, a garbage disposal, ice maker, microwave, patio, and in-unit washer/dryers. Construction is anticipated to begin in March 2024.
Partnerships to Serve Communities of Color:	The Housing Authority of Lincoln County (HALC) has signed an MOU with Centro de Ayuda, Inc. to provide input on project design and feedback on combating barriers that are faced by the Latinx community in Lincoln County. Centro de Ayuda will provide expanded services for members of the Latinx community who are unsheltered, underhoused, or at risk of losing housing in order to assist them in accessing housing. HALC has also consulted with Arcoiris Cultural, a cultural center that supports Latinx and indigenous Mesoamerican communities in Lincoln County on approaches to marketing the project and project design.
Reaching Underserved Communities:	HALC will work with both Centro de Ayuda and Arcoiris to continue outreach and engagement to the Latinx community during construction and for marketing of the units to increase the development's ability to provide access to housing to prospective tenants and to provide support to Latinx residents.



Depoe Bay Townhomes– Housing Stability Council

MWESB Target:	The development team has committed to achieving 20% MWESB/SDVBE owned subcontractors with their general contractor.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none">• Affordable Rental Housing• Rural Communities
The LIFT program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement, and engage MWESB organizations.	
This development will need to conform to all OHCS underwriting standards. The primary risk is with the current construction environment relating to cost escalations, subcontractor labor, and interest rate increases. Enough contingency/escalation was built into the construction budget to mitigate risk of inflation.	





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SUMMARY

Project Name:	Estacada Apartments Phase II		
City:	Estacada	County:	Clackamas
Sponsor Name:	Home First Development		
Urban/Rural:	Rural (Portland Metro Counties)	Total Units:	48
# Rent Assisted Units:	N/A	Units by Size & Affordability:	18 2-BDRM @ 60% AMI 30 3-BDRM @ 60% AMI
Funding Request		Funding Use	
LIFT Request:	\$11,880,000	Acquisition	\$871,640
		Construction	\$12,399,634
		Development	\$4,933,124
		Total:	\$18,204,398

PROJECT DETAILS

Project Description:	<p>Estacada Apartments Phase II is a new construction rental development located in Estacada, an area that lost housing units in the 2020 wildfires. Located slightly north of the Estacada Apartments Phase I, this phase of development will be four three-story garden style residential buildings and one single-story community building on a 1.97-acre parcel. The site design includes parking, with the number of EV Ready spaces to still be determined. Individual unit amenities include electric forced air heating and cooling, a dishwasher, microwave, patio or balcony, and in-unit washer/dryers.</p> <p>This is the second phase of an expected two-phase development. Construction is anticipated to begin in March 2024.</p>
Partnerships to Serve Communities of Color:	<p>Home First Development (HFD) has signed an MOU with Evergreen Community Partners (ECP), an affiliated nonprofit founded in 2021 to support the development of affordable housing and affordable housing residents in the Pacific Northwest. Led by Chris Aiosa, the founder of Do Good Multnomah, ECP will develop and implement an outreach plan based on feedback from community partners. Additionally, an MOU has been signed with Todos Juntos, a local school-based service provider in rural Clackamas County, to provide onsite resident services for families with children as well as assisting with future resident referrals, parenting classes, or other needed resources and services.</p>



Estacada Apartments Phase II – Housing Stability Council

Reaching Underserved Communities:	Todos Juntos has been helping families and individuals access nonprofit and government programs since 2000. With these deep roots in the community, Todos Juntos has existing relationships with the Latinx community in Estacada that the development team will leverage to get information about this housing opportunity to them. Information will be provided in both English and Spanish, with community partner workshops to train partners on resident eligibility, application processes, and expected rents to help mitigate expected barriers to housing.
MWESB Target:	Home First Development has hired Rubitone Development Services, a MWESB Construction Specialist firm, that will assist this project in achieving 35% MWESB/SDVBE owned subcontractors, with an aspirational goal of 40% participation.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"> • Equity and Racial Justice • Affordable Rental Housing • Rural Communities
The LIFT program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement, and engage MWESB organizations.	
This development will need to conform to all OHCS underwriting standards. The primary risk is with the current construction environment relating to cost escalations, subcontractor labor, and interest rate increases. Enough contingency/escalation was built into the construction budget to mitigate risk of inflation.	



Rendering of Estacada Apartments Phase II



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SUMMARY

Project Name:	Ollie Court		
City:	Eugene	County:	Lane
Sponsor Name:	Homes for Good Housing Agency		
Urban/Rural:	Urban	Total Units:	81
# Rent Assisted Units:	All 80 Affordable Units	Units by Size & Affordability:	15 1-BDRM @ 60% AMI 49 2-BDRM @ 60% AMI 16 3-BDRM @ 60% AMI 1 2-BDRM MGR Unit
Funding Request		Funding Use	
LIFT Request:	\$11,254,000	Acquisition	\$0
Expected 4% LIHTC Annual:	\$1,531,909	Construction	\$34,911,804
OAHTC Loan Amount:		Development	\$10,524,615
Expected Conduit Bond Request:	up to \$20,400,000	Total:	\$45,436,419

PROJECT DETAILS

Project Description:	Ollie Court is a new construction rental development that will co-locate 81 units of affordable housing with an Early Learning Center to address the needs for both affordable housing and affordable childcare in Eugene. Consisting of two four-story elevator-served buildings, the first floor of one building will hold the early learning center. The site design includes community amenities such as a community room, laundry facilities, and a rental office, as well as outdoor amenities such as a playground and parking (with 46 EV ready parking stations). Individual unit amenities include electric forced air heat, through wall air conditioning, a dishwasher, and in-unit washer/dryer hook-ups. Construction is anticipated to begin in July 2024.
Partnerships to Serve Communities of Color:	Homes for Good Housing Agency (HFG) has signed MOUs with Head Start of Lane County and Early Childhood CARES to facilitate and create early learning services for children age birth to five years old. An additional MOU has been signed with Centro Latino Americano (Centro) for feedback on the design of Ollie Court, future tenant outreach, and technical assistance around garden design and implementation. Lastly, an MOU has been signed



	with HFG’s Supportive Services section for ongoing resident services with existing partnerships.
Reaching Underserved Communities:	<p>HFG has been working with Centro to mitigate barriers in the Latinx community through education opportunities, like their ‘Waitlist Connect’ event. Many Centro staff have mentioned that undocumented individuals who are looking for housing do not want to share any information about their situation for fear of deportation. There is also an impression that everyone in the household must be a citizen to live in a Project-Based Voucher (PBV) subsidized apartment. This event works to dispel myths around affordable housing and PBVs so that more Latinx households can access housing. Additionally, HFG has translated most documents and forms into Spanish and has a number of bilingual staff on hand to enable better communication with future tenants.</p> <p>HFG is also partnering with Sponsors Inc., an organization that helps individuals who were previously incarcerated to access housing by evaluating and improving intake practices. One way that has been done was to allow, and encourage, documentation from character witnesses up front instead of just running a background check.</p>
MWESB Target:	Homes for Good Housing Agency has committed to achieving 20% MWESB/SDVBE owned subcontractors with their general contractor.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"> • Equity and Racial Justice • Affordable Rental Housing
The LIFT program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement, and engage MWESB organizations.	
This development will need to conform to all OHCS underwriting standards. The primary risk is with the current construction environment relating to cost escalations, subcontractor labor, and interest rate increases. Enough contingency/escalation was built into the construction budget to mitigate risk of inflation.	



Rendering of Ollie Court



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SUMMARY

Project Name:	Pacific Flats		
City:	Phoenix	County:	Jackson
Sponsor Name:	Commonwealth Development Corporation of America & Natives of One Wind Indigenous Alliance (NOWIA) Unete		
Urban/Rural:	Rural	Total Units:	72
# Rent Assisted Units:	N/A	Units by Size & Affordability:	4 2-BDRM @ 30% AMI 10 2-BDRM @ 50% AMI 28 2-BDRM @ 60% AMI 4 3-BDRM @ 30% AMI 10 3-BDRM @ 50% AMI 16 3-BDRM @ 60% AMI
Funding Request		Funding Use	
LIFT Request:	\$13,515,000	Acquisition	\$1,100,000
Expected 4% LIHTC Annual:	\$868,522	Construction	\$16,732,903
OAHTC Loan Amount:	\$0	Development	\$6,901,407
Expected Conduit Bond Request:	up to \$12,600,000	Total:	\$24,734,310

PROJECT DETAILS

Project Description:	Pacific Flats is a new family development in the city of Phoenix, a community that was devastated by the wildfires in 2020. Consisting of five three-story garden style residential buildings and one single-story community building, the 3.7-acre site was annexed into the City of Phoenix in February 2023. This location is less than .75 of a mile from the city center, with a bus stop in front of the site, and is less than .5 mile from Phoenix High School. The site design includes amenities such as ample parking, a playground, and a community building which will house a business center, community room, exercise room, and leasing office. Individual unit amenities include a heat pump, through wall air conditioning, a dishwasher, microwave, patio or balcony, security systems, and in-unit washer/dryer. Construction is anticipated to begin in February 2024.
Partnerships to Serve Communities of Color:	Commonwealth Development Corporation has entered a development partnership with local Culturally Specific Organization, Natives of One Wind Indigenous Alliance (NOWIA) Unete, Center for Farm Worker Advocacy. Founded in 1996, NOWIA Unete was formed due



	<p>to the need for farm worker representation in legislative actions that would have excluded them from state minimum wage requirements, and from their rights to file grievances related to labor violations. Since the 2020 wildfires swept through Jackson County, NOWIA Unete has been assisting Latino families that did not seek federal assistance due to mistrust of federal aid programs.</p> <p>This will be NOWIA Unete’s first rental development, although it has partnered with Commonwealth previously to assist with lease-up, outreach, and resident services on a previously approved LIFT project in Talent.</p> <p>An MOU has been signed with ACCESS, Jackson County’s Community Action Agency, to provide wrap around services to future Pacific Flats residents that are currently being assisted. The development team has also reached out to BASE (Black Alliance & Social Empowerment) Southern Oregon to assist with outreach efforts. BASE is a new nonprofit that seeks to bring community to Black people throughout the Rogue Valley. This will be the first time BASE is involved in housing efforts, with targeted outreach during predevelopment and preleasing activities.</p>
Reaching Underserved Communities:	<p>This will be Commonwealth’s second wildfire recovery development in a rural area of the Rogue Valley. Previous engagement with NOWIA Unete and ACCESS for Renaissance Flats has given the Pacific Flats development team a direct connection to those families impacted by wildfires. NOWIA Unete is serving over 500 Latinx families that are still displaced from the 2020 wildfires.</p> <p>NOWIA Unete and Commonwealth will work together to shape the screening criteria to reduce barriers, including modifying screening procedures and devoting additional resources to the income verification process. Commonwealth will be partnering with Viridian Management to provide training to NOWIA Unete to understand the nuances of Section 42 Low Income Tax Credit Housing and related compliance matters, to be hands on during the lease-up period, working with each identified family to gather the requirement paperwork.</p>
MWESB Target:	The development team has established a goal of 20% MWESB/SDVBE owned subcontractors for construction activities, and a goal of 5-10% MWESB/SDVBE owned businesses for professional services.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"> • Equity and Racial Justice • Affordable Rental Housing • Rural Communities
The LIFT program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement, and engage MWESB organizations.	



This development will need to conform to all OHCS underwriting standards. The primary risk is with the current construction environment relating to cost escalations, subcontractor labor, and interest rate increases. Enough contingency/escalation was built into the construction budget to mitigate risk of inflation.





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SUMMARY

Project Name:	Phoenix Corner		
City:	Phoenix	County:	Jackson
Sponsor Name:	Stewardship Development LLC & Oregon Human Development Corporation		
Urban/Rural:	Rural	Total Units:	88
# Rent Assisted Units:	N/A	Units by Size & Affordability:	24 1-BDRM @ 60% AMI 32 2-BDRM @ 60% AMI 32 3-BDRM @ 60% AMI
Funding Request		Funding Use	
LIFT Request:	\$15,300,000	Acquisition	\$2,105,880
Expected 4% LIHTC Annual:	\$1,031,547	Construction	\$18,514,780
OAHTC Loan Amount:	\$0	Development	\$7,843,456
Expected Conduit Bond Request:	up to \$14,315,470	Total:	\$28,464,116

PROJECT DETAILS

Project Description:	Phoenix Corner is a new 88 home development in Phoenix, a community still recovering from the 2020 Labor Day wildfires. The 4-acre site will hold one two-story garden style residential building, and four three-story garden style buildings. A single-story community building with leasing and resident services offices, a community room with a kitchen and laundry facilities will be located onsite. Additional outdoor amenities include a playground area, long term bicycle parking, a dog run, and parking (with 25 EV Ready parking spaces planned). Individual unit amenities include forced air heating, through wall air conditioning, a dishwasher, microwave, patio or balcony, a security system, and washer-dryer hook-ups. Construction is anticipated to begin in April 2024.
Partnerships to Serve Communities of Color:	Stewardship Development has signed a co-developer agreement with Oregon Human Development Corporation (OHDC), Oregon's only culturally specific community action agency. With 10 offices across Oregon, OHDC supports agricultural workers with job training, housing assistance, and other services such as weatherization assistance, in specific counties. Additional MOUs have been signed with Cornerstone Community Housing for culturally responsive resident services, including lease-up activities and



	outreach, and with ACCESS, Jackson County’s community action agency, for resident referrals and program services.
Reaching Underserved Communities:	Marketing activities for Phoenix Corner’s lease-up phase will begin 3-4 months prior to construction completion. OHDC will provide interpretation and language services for Latinx/Hispanic families, as well as using their existing connections to various service providers to spread the word of this housing opportunity. The development team will also train community partners on how to help families and individuals apply, along with having both an online application as well as after-hours support to accommodate future residents who work during the day.
MWESB Target:	The development team has established a goal of 20% MWESB/SDVBE owned subcontractors.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"> • Equity and Racial Justice • Affordable Rental Housing • Rural Communities
The LIFT program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement, and engage MWESB organizations.	
This development will need to conform to all OHCS underwriting standards. The primary risk is with the current construction environment relating to cost escalations, subcontractor labor, and interest rate increases. Enough contingency/escalation was built into the construction budget to mitigate risk of inflation.	



Rendering of Building Type for Phoenix Corner



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SUMMARY

Project Name:	Rand Road Affordable Housing		
City:	Hood River	County:	Hood River
Sponsor Name:	Community Development Partners & Columbia Cascade Housing Corporation		
Urban/Rural:	Rural	Total Units:	129
# Rent Assisted Units:	39 total, Including: 6 Studios 9 1-BDRM 12 2-BDRM 12 3-BDRM	Units by Size & Affordability:	6 Studios @ 60% AMI 17 1-BDRM @ 60% AMI 57 2-BDRM @ 60% AMI 48 3-BDRM @ 60% AMI 1 2-BDRM MGR Unit
Funding Request		Funding Use	
LIFT Request:	\$15,100,000	Acquisition	\$0
Expected 4% LIHTC Annual:	\$2,833,029	Construction	\$41,717,837
OAHTC Loan Amount:	\$0	Development	\$16,605,459
Expected Conduit Bond Request:	up to \$29,911,860	Total:	\$58,323,296

PROJECT DETAILS

Project Description:	Rand Road Affordable Housing is a new rental development in the City of Hood River. The 7.15-acre site will hold 22 townhome-style 3-bedroom rental homes, two three-story residential buildings with a mix of studio, 1-, 2- and 3-bedroom apartments, and a single 4-story elevator-served residential building with 1-, 2-, and 3-bedroom apartments. A single-story community building with leasing and service offices, a community room with a kitchen, and laundry facilities on site. There will also be designated greenspace and a playground area. The site design also includes outdoor amenities such as parking (with 47 EV Ready parking spaces planned) and access to a community nature trail. Individual unit amenities include forced air heating, through wall air conditioning, a dishwasher, microwave, and washer-dryer hook-ups, with in-unit washer/dryers provided in the townhomes. Construction is anticipated to begin in November 2024.
Partnerships to Serve Communities of Color:	The City of Hood River started engagement with the community in the spring of 2021, after purchasing the property in January 202 with the intent of building affordable housing. A competitive and public bid process ended with Community Development Partners (CDP) and Columbia Cascade Housing Corporation (CCHC) as the developer for



	<p>this development. CCHC is the development arm of the Mid-Columbia Housing Authority. CDP and CCHC built upon the initial engagement from the City, using Portland State University's Center for Public Interest Design to conduct an Asset-based Community Development assessment. Part of this assessment involved interviewing 17 community organizations, including The Next Door, Inc. (TNDI) and TNDI's Native American Services Division, One Community Health, Aging in the Gorge Alliance, Columbia Area Transit, and Mid-Columbia Head Start.</p> <p>MOUs have been signed with TNDI, Nch'I Wana Housing, Oregon Human Development Corporation, and EngAGE NW to assist with various levels of housing related activities, such as: lease up referrals, tenant selection plan design, site plan design, and resident services referrals.</p>
Reaching Underserved Communities:	<p>Rand Road Affordable Housing will be relying upon CCHC and TNDI for additional outreach guidance. TNDI led an all-Latino focus group early in the process to assist the development team in reaching members of the Latinx community.</p> <p>CCHC and Engage will be the primary resident services providers, with TNDI, Nch'I Wana Housing, and OHDC providing lease-up referrals and assistance. TNDI will have a priority preference on some units, with the size and number of units to be determined closer to the completion of construction.</p>
MWESB Target:	<p>The development team has established a goal of 34% MWESB/SDVBE owned subcontractors, with an expectation of 30% participation for construction activities, and a goal of 75% participation for design services.</p>
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"> • Equity and Racial Justice • Affordable Rental Housing • Rural Communities
<p>The LIFT program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement, and engage MWESB organizations.</p>	
<p>This development will need to conform to all OHCS underwriting standards. The primary risk is with the current construction environment relating to cost escalations, subcontractor labor, and interest rate increases. Enough contingency/escalation was built into the construction budget to mitigate risk of inflation.</p>	



Rendering of Rand Road Affordable Housing



**OREGON HOUSING *and*
COMMUNITY SERVICES**

725 SUMMER STREET NE, SUITE B | SALEM, OR 97301
503-986-2000 | www.oregon.gov/OHCS

SUMMARY

Project Name:	Rivergreen Apartments Phase II		
City:	Corvallis	County:	Benton
Sponsor Name:	Green Light Development		
Urban/Rural:	Urban	Total Units:	24
# Rent Assisted Units:	N/A	Units by Size & Affordability:	3 1-BDRM @ 60% AMI 9 2-BDRM @ 60% AMI 12 3-BDRM @ 60% AMI
Funding Request		Funding Use	
LIFT Request:	\$5,580,000	Acquisition	\$3,000
		Construction	\$5,505,280
		Development	\$2,733,519
		Total:	\$8,241,799

PROJECT DETAILS

Project Description:	<p>Rivergreen Apartments Phase II is a new construction rental development located in Corvallis. Located along the northern border of Rivergreen Apartments Phase I, this phase of development will be two three-story garden style residential buildings on a 0.67-acre parcel. The site design includes parking spaces, with the number of EV Ready spaces to still be determined. The outdoor amenities from Phase I will be made available to residents of Phase II and include a community building with a rental office, playground, and courtyard. Individual unit amenities include electric forced air heating, a A/C window unit, a dishwasher, microwave, patio or balcony, and in-unit washer/dryers.</p> <p>This is the second phase of an expected two-phase development. Construction is anticipated to begin in October 2023.</p>
Partnerships to Serve Communities of Color:	<p>Green Light Development (GLD) has signed an MOU with Casa Latinos Unidos (CLU), a culturally specific organization that is working with the development team on Phase I. CLU will provide robust resident services to the residents of Rivergreen Apts Phase II, utilizing their innovative and comprehensive resident services program. An additional MOU with Evergreen Community Partners (ECP), an affiliated nonprofit founded in 2021 to support the development of affordable housing and affordable housing residents in the Pacific Northwest, has been signed to supplement CLU's resident services through on-site</p>



Rivergreen Apartments Phase II – Housing Stability Council

	meetings, resident surveys and other outreach methods to ensure that needs of residents and service providers are being met.
Reaching Underserved Communities:	Casa Latinos Unidos (CLU) was founded in 2009 to serve Latinx community in Benton and Linn Counties. The development team will be relying upon CLU to develop and implement a culturally specific marketing and outreach plan. In addition, the development team will hold community partner workshops to train partners on resident eligibility, application processes, and expected rents to help mitigate expected barriers to housing.
MWESB Target:	Green Light Development has hired Rubitone Development Services, a MWESB Construction Specialist firm, that will assist this project in achieving 25% MWESB/SDVBE owned subcontractors, with an aspirational goal of 30% participation.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"> • Equity and Racial Justice • Affordable Rental Housing
The LIFT program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement, and engage MWESB organizations.	
This development will need to conform to all OHCS underwriting standards. The primary risk is with the current construction environment relating to cost escalations, subcontractor labor, and interest rate increases. Enough contingency/escalation was built into the construction budget to mitigate risk of inflation.	



Rendering of Rivergreen Apartments Phase II



**OREGON HOUSING *and*
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SUMMARY

Project Name:	Gussie Belle Brown Apartments		
City:	Salem	County:	Marion
Sponsor Name:	Green Light Development (GLD) & Seed of Faith Ministries (SoFM)		
Urban/Rural:	Urban	Total Units:	120
# Rent Assisted Units:	N/A	Units by Size & Affordability:	24 1-BDRM @ 30% AMI 6 1-BDRM @ 60% AMI 30 2-BDRM @ 60% AMI 54 3-BDRM @ 60% AMI 6 4-BDRM @ 60% AMI
Funding Request		Funding Use	
LIFT Request:	\$17,850,000	Acquisition	\$3,785,356
Expected 4% LIHTC Annual:	\$1,937,536	Construction	\$29,326,136
OAHTC		Development	\$9,651,800
Expected Conduit Bond Request:	up to \$22,000,000	Total:	\$42,763,292

PROJECT DETAILS

Project Description:	<p>Gussie Belle Brown Apartments is a new construction rental development located in Salem's Northeast neighborhood consisting of nine three-story garden style residential buildings and one single-story community building. The site design includes outdoor amenities such as a dog run, basketball court, playground, EV stations, and a full solar array. Individual unit amenities include electric forced air heating and cooling, a dishwasher, microwave, patio or balcony, and in-unit washer/dryers.</p> <p>This is the first phase of an expected two-phase development that will include a co-located early childhood education or daycare center as part of phase two. Construction is anticipated to begin in June 2024.</p>
Partnerships to Serve Communities of Color:	<p>Green Light Development has signed a co-developer agreement with Salem-based, Black-led church, Seed of Faith Ministries. SoFM has been serving the Salem community in various ways for over 25 years, creating and guiding programs to serve and shelter houseless individuals and families. SoFM's leadership has a long track record of assisting people in moving into transitional housing, utilizing partnerships across different community organizations to provide affordable housing, employment opportunities, food, daily living</p>



	<p>needs, and healthcare. These existing partnerships will be critical to bringing stability and prosperity to future residents. As the co-developer of this development team, SoFM is bringing the lived experience of their leadership in serving the Salem community to this development, both through leading outreach efforts and by coordinating resident referrals for up to 25 of these new apartment homes.</p> <p>Additionally, Mid-Willamette Valley Community Action Agency (MWVCAA), and affiliated service provider Evergreen Community Partners (ECP) will be engaged to provide culturally responsive resident services, based on survey feedback from residents upon lease-up.</p>
Reaching Underserved Communities:	<p>GLD and SoFM have held listening sessions with members of the Black community in Salem and with SOFM's congregation in Salem. Since 1978, the Black incarceration rate in Oregon has increased by 79%. Early listening sessions have shown a pattern of families of incarcerated inmates moving to Salem, as it is the location of the maximum-security Oregon State Penitentiary. Families move to Salem to provide emotional support, maintain family ties, and continue with a consistent visitation schedule.</p> <p>The development team has heard from community members that the lived experience of the Black community in Salem is a story of enduring and persisting even with the lack of opportunity. To counter that, and in response to feedback that certain property management companies are biased against minority renters, a formal Request for Proposal (RFP) will be issued before a property management company is selected. The interview panel will include members from the SoFM community.</p>
MWESB Target:	Green Light Development has hired Rubitone Development Services, a MWESB Construction Specialist firm, that will assist this project in achieving 30% MWESB/SDVBE owned subcontractors.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none"> • Equity and Racial Justice • Affordable Rental Housing
The LIFT program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement, and engage MWESB organizations.	
This development will need to conform to all OHCS underwriting standards. The primary risk is with the current construction environment relating to cost escalations, subcontractor labor, and interest rate increases. Enough contingency/escalation was built into the construction budget to mitigate risk of inflation.	



Rendering of Gussie Belle Brown Apartments



**OREGON HOUSING *and*
COMMUNITY SERVICES**

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503-986-2000 | www.oregon.gov/OHCS

SUMMARY

Project Name:	Unicorn Bed		
City:	Portland	County:	Multnomah
Sponsor Name:	Guerrilla Development & Self Enhancement Inc		
Urban/Rural:	Urban	Total Units:	13
# Rent Assisted Units:	N/A	Units by Size & Affordability:	13 2-BDRM @ 60% AMI
Funding Request		Funding Use	
LIFT Request:	\$2,320,500	Acquisition	\$1,162,273
		Construction	\$2,740,587
		Development	\$946,635
		Total:	\$4,849,495

PROJECT DETAILS

Project Description:	Unicorn Bed is a new construction rental development located in Portland's Historic Alphabet District. Located on a 0.11-acre lot, this housing development will be two offset walk-up style residential buildings of two-bedroom apartments. With one 3- and one 4-story building, the design has a small footprint. Individual unit amenities include a mini split heating and cooling unit, a dishwasher, garbage disposal, microwave, wall to wall carpeting, and in-unit washer/dryers. Construction is anticipated to begin in September 2023.
Partnerships to Serve Communities of Color:	Guerrilla Development has partnered with Self Enhancement Inc (SEI) to bring Unicorn Bed to fruition. SEI is a Qualified Culturally Specific Organization that has served the Portland area since 1981 and was approached by Deborah Sposito in 2020 to inquire about developing a small sized affordable housing project on a piece of property she had recently inherited. Ms. Sposito remains in the ownership structure and intends to release her interest to SEI in the future. SEI will provide wrap-around services for all residents of Unicorn Bed.
Reaching Underserved Communities:	SEI works widely in the Portland Black/African American community and has been working with the PHB N/NE Oversight Committee since it was created over seven years ago. SEI currently maintains a waiting list of individuals and families who need housing



Unicorn Bed – Housing Stability Council

	and are part of the focused outreach to the underserved community that is the focus of this housing development.
MWESB Target:	Guerrilla Development has set a 35% MWESB/SDVBE owned subcontractors for construction and has already achieved 79% MWESB/SDVBE participation for professional services.
Alignment with Statewide Housing Plan:	<ul style="list-style-type: none">• Equity and Racial Justice• Affordable Rental Housing
The LIFT program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement, and engage MWESB organizations.	
This development will need to conform to all OHCS underwriting standards. The primary risk is with the current construction environment relating to cost escalations, subcontractor labor, and interest rate increases. Enough contingency/escalation was built into the construction budget to mitigate risk of inflation.	

Rendering of Unicorn Bed





Date: June 7, 2023

To: Housing Stability Council Members
Andrea Bell, Executive Director

From: Jill Smith, Director of Housing Stabilization
Michelle Cole, Assistant Director of Energy Services
Dan Elliott, Senior Program and Policy Analyst, Energy Services

Re: Energy Services Programs Briefing

Purpose: To provide a briefing on Weatherization Training Center and Oregon Multi-Family Energy Program. No HSC decision to be made.

Background

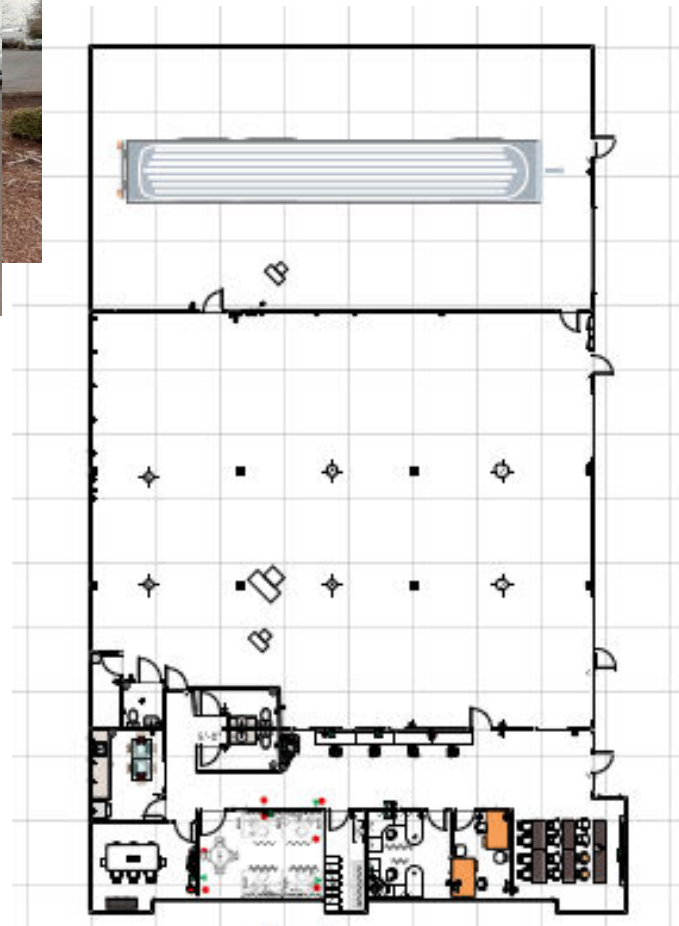
Weatherization Training Center:

This center will increase and enhance the skills for contractors across the state of Oregon to meet with the demands of production in energy technology, building science, renewables and energy efficient improvements in support of the following programs:

- US DOE (Infrastructure Investment and Jobs Act 2021)
 - HB 3141, Public Purpose Funding increased 60% annually. (2021)
 - Inflation Reduction Act of 2022
- The Weatherization Training Center location has been secured at 2475 Pringle Rd SE in Salem.
 - This location will house our entire OHCS Weatherization Department on the office side of the building as well as operate as the program's State Training Center through collaboration with CAPO and the Oregon Training Institute.
 - The lease is set for five years with the possibility of extension up to 10 years.
 - This space gives us ample opportunity to stand up a training facility that is modern and cutting edge with plans to bring a single wide mobile home into the warehouse to provide hands-on learning on the house type that covers nearly 60% of our low-income housing stock completions in Oregon.
 - It will work in collaboration with several other partners within the industry of energy and weatherization in trained workforce development that create pathways to careers in the home performance, energy efficiency, and renewable energy sectors by hiring and retaining professionals.
 - We will also be partnering with Oregon Human Development Corporation (OHDC) to expand training to migrant farmworkers, and BIPOC partners in local Community Action Agency service areas to allow the network to expand the workforce, increase weatherization provider network capacity, and further diversify weatherization provider auditors and inspectors.

- Through a \$1.4 million dollar US DOE workforce development grant, CAPO, Oregon Human Development Corporation (OHDC) and OHCS will partner to expand training to migrant farmworkers, and Black, Indigenous, and other communities of color partners.
 - This special project will benefit underserved community members seeking positions within the weatherization program across the state by raising awareness of the weatherization program as a green economy career path, increasing access to training resources that are considerate of cultural/linguistic differences and expand the capacity of the weatherization provider network.

We are negotiating timelines with CAPO and OTI as we develop their work agreement as terms and conditions are under discussion. We look forward to ribbon-cutting in the fall of 2023.



The Oregon Multifamily Energy Program (OR-MEP) updates:

With the program's prioritized focus on Diversity, Equity, and Inclusion (DEI), the Program Team and [OR-MEP DEI Coalition](#) collaborated with stakeholders and OHCS to meet program demand and agency goals.

The Oregon Multifamily Energy Program (OR-MEP) promotes and facilitates energy-efficient design in affordable multifamily housing through design assistance, cash incentives, coordination with other regional programs, and educational opportunities. OR-MEP funding is available for new and existing affordable multifamily housing properties.

Any project pursuing OHCS OR-MEP incentives must:

- Be an existing or new construction multifamily property with at least 5 residential units per building,
- Receive electricity from Pacific Power or Portland General Electric,
- Be heated by a hard-wired electrical heating system,
- Meet program affordability requirements, where residents in at least 50% of units are at or below 80% area median income (AMI) and units must remain affordable for at least 10 years after improvements.

The purpose of OR-MEP funding is to reduce energy use and heating costs for low-income Oregonians through energy efficiency improvements and three incentive pathways.



Incentive ranges are estimates only based on current program activity.

Due to the increased demand for the program and increased funding from [HB 3141](#), OR-MEP will launch a new funding prioritization and enrollment process called OR-MEP Open Enrollment. Open Enrollment moves away from the previous “first come, first served” approach to one that is now competitive with new DEI-focused criteria to prioritize projects with the highest need.

- Applications for project funding can only be submitted during the Open Enrollment period.
- Open Enrollment rounds are scheduled to be open once every six months.
- Projects must meet the following timeline prerequisites:
 - Project will finalize development of energy efficiency scope to **reserve incentives within 6 months of Open Enrollment selection.**



-
- Project will **start installing energy upgrades within one year of Open Enrollment selection.**
 - Applications will be reviewed and competitively ranked, based on the following criteria and priorities:
 - Projects serving BIPOC communities and residents,
 - Projects located in communities with high energy burden,
 - Rural projects,
 - Naturally occurring affordable housing,
 - Applicant entities that are non-profits and housing authorities,
 - Energy efficient design,
 - First-time participation.
 - Applications that have the highest scores within each set-aside category will be recommended for funding as allocated resources allow.
 - Projects that are selected for funding are then eligible to enroll in OR-MEP to reserve incentives.
 - Minor changes to incentive structures consider supply chain issues and the increased costs associated with working in rural areas away from where most contractors are located.
 - Based on Public Comments received, selected projects will have 18 months to start construction instead of 12 months.

Alignment with the Statewide Housing Plan

Priority: Equity and Racial Justice

People of color—both single adults and families—experience higher levels of energy burden compared to their white counterparts throughout Oregon. We are committed to being actively anti-racist, equitably serving the people of Oregon, and doing our part to disrupt entrenched systems that perpetuate racial inequality, within the energy industry and beyond. We stand with the diverse communities we serve and their rights to be respected, safely housed, and to secure environmental and energy justice. We will adopt and adapt policies and practices to eliminate systemic racism from administration and implementation of the program. The training center will address this in the workforce and the OR-MEP updates will address this in prioritizing the inequalities with improved prioritization and outreach.

Priority: Homelessness

The OR-MEP helps to stabilize families by permanently reducing energy use and costs freeing up income to help maintain other essential household costs. Additionally, OHCS prioritizes energy efficiency in transitional housing/shelters allowing housing providers to invest in other supports/services for houseless individuals and families.

Priority: Affordable Rental Housing

OR-MEP and the training centers overall goal is preserving and supporting the production of affordable units across Oregon by stabilizing those households with reduction in energy burdens. Our production goals will have more impact on increasing affordable housing supply in the state by leveraging these investments in workforce development and energy efficiency design.



Priority: Rural Communities

OR-MEP and the weatherization training center will prioritize its applicants and recipients specifically to and from rural communities.



OREGON HOUSING & COMMUNITY SERVICES
Energy Services Section

State Weatherization Training Center

Date: June 7th, 2023

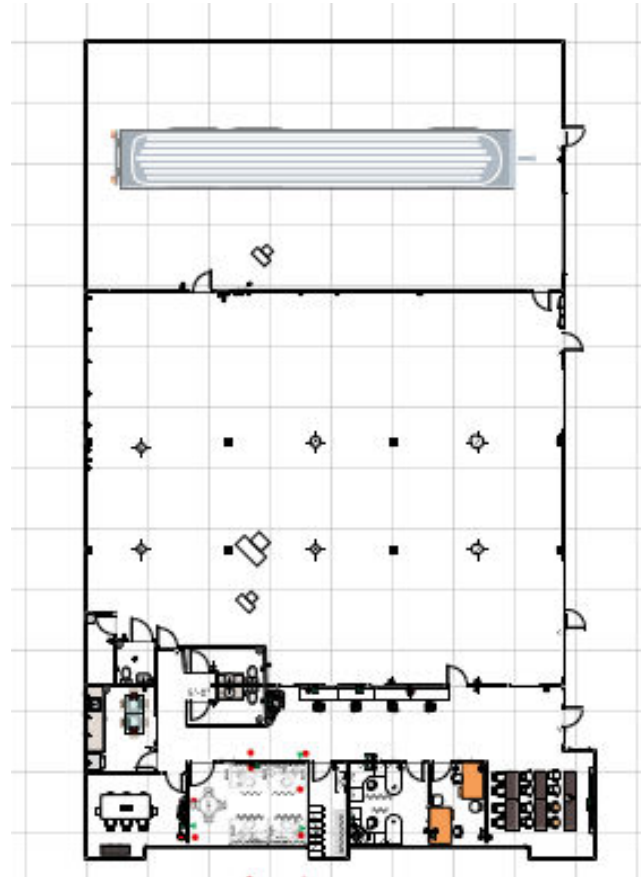
Presenter: Michelle Cole, Assistant Director , Energy Services Section



State Weatherization Training Center

- ◆ This center will increase and enhance the skills for contractors across the state of Oregon to meet with the demands of production in energy technology, building science, renewables and energy efficient improvements in support of the following programs :
- ◆ US DOE (Infrastructure Investment and Jobs Act 2021)
- ◆ HB 3141, Public Purpose Funding increased 60% annually. (2021)
- ◆ Inflation Reduction Act of 2022

WTC: 2475 Pringle Rd SE in Salem, Oregon.



American Recovery and Reinvestment Act ARRA training increased production by 45% (2010-2013)



OREGON HOUSING & COMMUNITY SERVICES Energy Services Section

Oregon Multifamily Energy Program(OR-MEP) Update

Date: June 7th, 2023

Presenter: Dan Elliott, Senior Program and Policy Analyst, Energy Services Sections



Oregon Multifamily Energy Program

Cash incentives and design support for energy efficiency upgrades in affordable multifamily retrofits and new construction.



Funded through
Public Purpose
Funds from:

- Pacific Power
- Portland General Electric

OR-MEP Program Goals

To reduce the energy burden for residents across multifamily affordable housing.



Efficient Building Design

Influence building design to reduce energy consumption.



Efficient Building Use

Inform and engage residents on building use to reduce energy use/cost and increase comfort.

Oregon Multifamily Energy Program Overview

◆ Program Funding Source

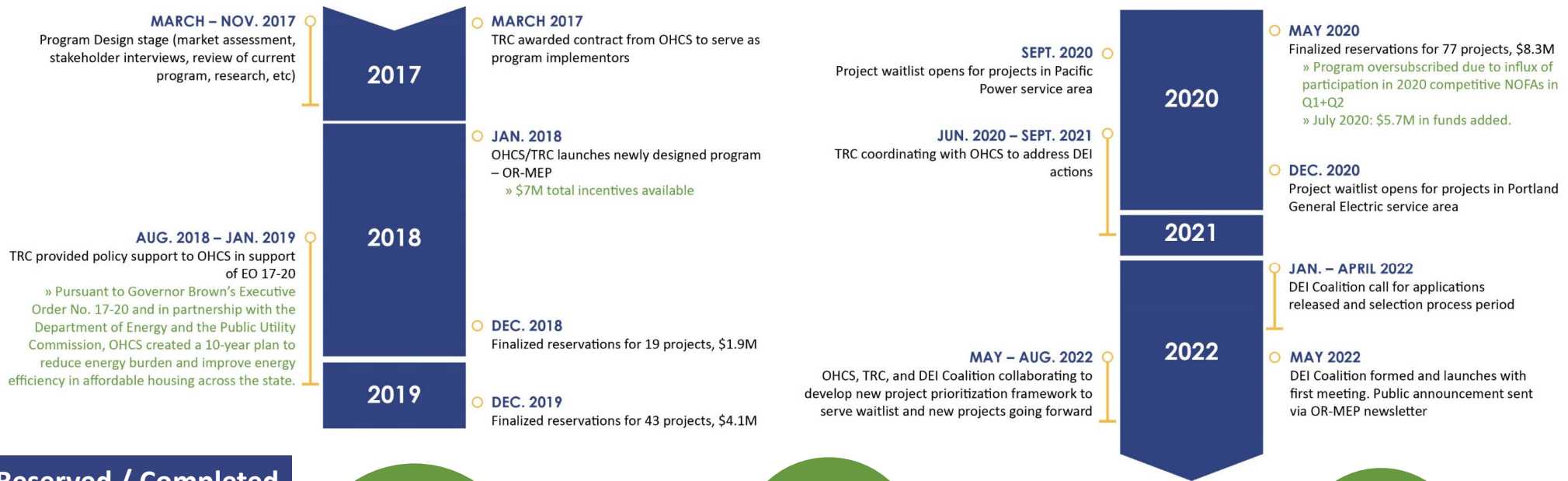
- Public Purpose Funds from Pacific Power and Portland General Electric

◆ Eligibility Requirements

Any project pursuing OHCS Multifamily Energy Program (OR-MEP) incentives must:

- ✓ Be an existing or new construction multifamily property with at least 5 residential units per building,
- ✓ Receive electricity from Pacific Power or Portland General Electric,
- ✓ Be heated by a hard-wired electrical heating system,
- ✓ Meet program affordability requirements, where residents in at least 50% of units are at or below 80% area median income (AMI) and units must remain affordable for at least 10 years

2017 – 2022 Program Highlights



Reserved / Completed

100 projects | 6,800 units | \$12.6M

Waitlist

97 projects | 6,083 units

Easy program process & positive participant experience

Strong brand & program awareness (website, newsletter, case studies etc.)

Strong partnerships & relationships

Co-funding with Energy Trust Existing Multifamily program

Delivered 30+ trainings

Formed & launched DEI Coalition

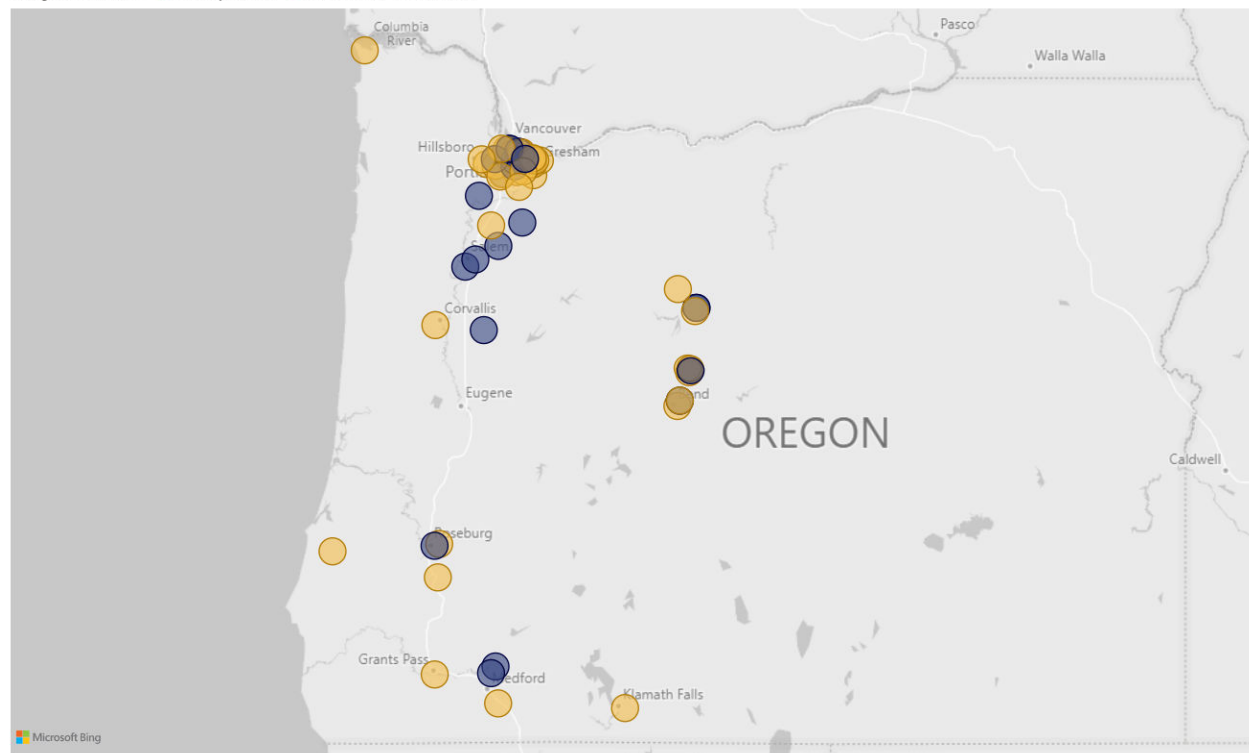
Best team to work with!

Program by the Numbers

In 4 years, with
\$12M in funding...
94 properties and
6,806 units enrolled.

In 24 months...
97 properties and
6,083 units waitlisted.
(Anticipate at least \$12M
for next 5 years from PPC)

Project Status ● Completed ● Incentive Reserved



Program need to reassess criteria with DEI focus to prioritize projects with highest need.

HB 3141(2021)

- ◆ In 2021, the Oregon Legislature passed [House Bill 3141](#), which made numerous changes to the statutes for the Public Purpose Charge. These changes include extending the Public Purpose Charge collection and programs associated through January 01, 2036, moved energy conservation funding out of the Public Purpose Charge to energy efficiency through utility rates, reduced the collection of 3% to 1.5% and lastly adjusted the funding percentages allocated to the remaining categories:
 - ◆ · 0.30% of 1.5% to School Districts
 - 0.51% of 1.5% to Renewable Energy
 - 0.55% of 1.5% to Low-Income Weatherization
 - 0.14% of 1.5% to Low-Income Housing
- ◆ Three entities administer the funds to accomplish the four public purposes. Two are state agencies, Oregon Department of Energy and Oregon Housing and Community Services, and the third is an independent nonprofit organization, [Energy Trust of Oregon](#), which operates under a grant agreement with the [Oregon Public Utility Commission](#).
- ◆ This law redirected funds to increase OHCS low-income weatherization for OR-MEP by nearly 60% more funding per year.

DEI Coalition Vision

Recommend and influence changes to the OR-MEP program to make it more accessible to all, especially customers who spend the highest percentage of their household income on energy costs.

Including:

**Customers
of Color**

**Those for whom
English is not
their first
language**

**Customers living
in rural
communities**

**Those
navigating low
incomes**

DEI Coalition Preliminary Objectives

1

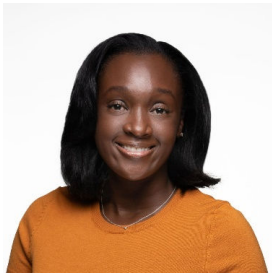
Modify and develop OR-MEP policies and practices to eliminate systemic racism

2

Help the program team equitably engage with all applicable communities and customers

DEI Coalition Formed in May 2022

Facilitation Team



Quinn Parker
Encolor



Sepideh Rezania
Unrooz Solutions

Coalition Members (current & past)



Mohanad Alnajjar
2022 - present



Ellen Bolus-Edmonds
2022 - present



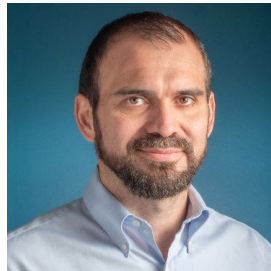
Greg Delgado
2022 - present



Thomas Eldridge
2022 - present



Kwame Kinabo
2022 - present



**Esteban Montero
Chacon**
2022 - present



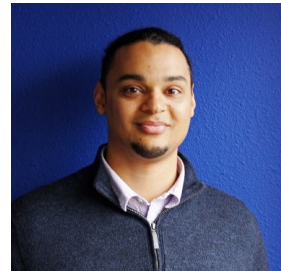
Natalie Thornton
2022 - present



Stepha Dragoon
2022



James Metoyer
2022



Isaiah Kamrar
2022

New OR-MEP Open Enrollment Framework

- ◆ Enrollment process shifting from “first come, first served” to “competitively ranked” with new DEI focused criteria to prioritize projects with highest need.
- ◆ Prioritization criteria co-created between Program Team & DEI Coalition.
- ◆ Open Enrollment rounds are scheduled to be open twice annually, every 6 months.

Scoring Categories & Weighting

Category	Max Total Points	% of Points
BIPOC (Community + Residents)	10	32%
High Priority Area Index (Energy Burden)	5	16%
Rural	5	16%
Naturally Occurring Affordable Housing (NOAH)	5	16%
Non-profit/government entity	2	6%
Energy Efficient Design	2	6%
First Time Participant	2	6%

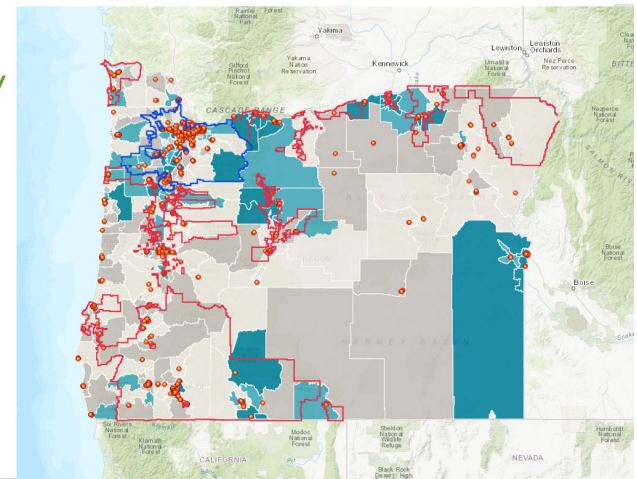
Affordable Housing Inventory of Multifamily Properties

+ Ethnicity & Race by Census Tract

Percent people of color (%)



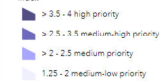
+ Portland General Electric & Pacific Power Service Area



Affordable Housing Inventory of Multifamily Properties

+ High Priority Area Index by Census Tract

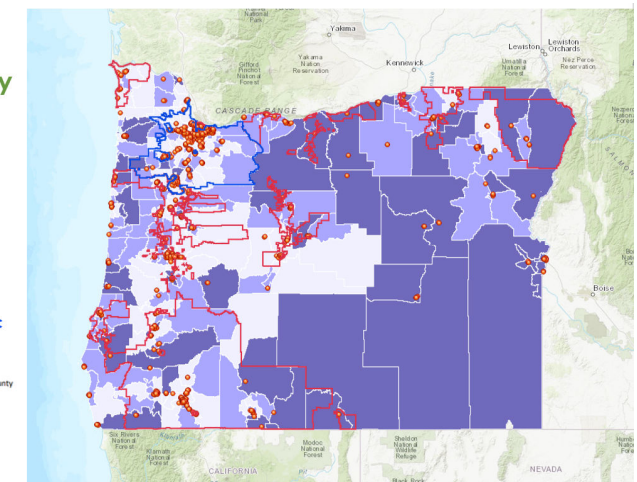
Index:



+ Portland General Electric & Pacific Power Service Area

The four variables used to develop this index for each county were:

- Percent of energy burdened households,
- Percent of low-income households,
- Percent of units built prior to 1990, and
- Percent of people of color.



DATE: July 7, 2023

TO: Housing Stability Council
Andrea Bell, Executive Director

FROM: Nicole Stingh, Assistant Director of Government Relations
Leann Knapp, Legislative and Government Relations Coordinator
Alexandra Ring, Legislative and Government Relations Coordinator
Tanisha Rosas, Legislative and Government Relations Coordinator
Jaci Davis, Rules and Legislative Coordinator

SUBJECT: 2023 Legislative Session Outcomes

After a whirlwind session, the 2023 Oregon Legislative Session came to a close with significant investments in housing. Although the legislature did not invest to the scale in the Governor's Recommended Budget, OHCS is posed to strategically expand our work across the housing continuum.

OHCS secured \$1.14 billion in housing investments to address the needs of Oregonians across the continuum, detailed below.

- \$721.7 million to advance supply solutions.
- \$349.6 million to respond to and prevent homelessness and housing instability statewide.
- \$46.1 million to maintain community homelessness resources.
- \$20 million to expand access to and preserve homeownership.
- \$1.7 million to expand access to OHCS programs.

These investments are accompanied by policy bills that change OHCS programs and enact new measures related to land use, landlord/tenant law, and more. OHCS is charge of implementing many bills and initiatives, including nine new programs among other new legislative mandates. Additional information will be provided by OHCS in the coming months as the agency plans and prioritizes implementation efforts in alignment with operational excellence standards and the Governor's Office.

On July 7th, Assistant Director Stingh will provide a presentation on these investments and policy changes OHCS is charged with implementing. While we know the Council is eager to dig into programming, this conversation is not focused on implementation. Instead, the Council will hear a high-level summary of the legislative session, which included a six-week walkout that



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halted movement of all legislation in the Senate. In the meantime, the [OHCS Legislative Highlights document](#) offers an initial summary of legislative action impacting OHCS.

Summary Materials

- 2023 Legislative Highlights, snapshot of investments and policy changes impacting OHCS. [Available online now!](#)
- 2023 Legislative Session Digest, information and links for all bills, passed or not, impacting OHCS and the housing policy landscape. *To be released in the late summer.*
- The OHCS Rulemaking Pipeline will detail planned updates to Oregon Administrative Rules and associated engagement opportunities. *To be updated in the coming months.*