

# Housing Stability Council

## MEETING MATERIALS PACKET



The Anna Mann Apts  
NE Portland

Feb 07, 2025  
9:00 a.m. – 12:30 p.m.  
Oregon Housing & Community Services  
Webinar

# AGENDA

February 7, 2025 9:00 a.m. – 12:30 p.m.  
Oregon Housing and Community Services  
725 Summer St NE, Salem OR 97301

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

\*Please note the [public hearing process](#)

Council Members:  
Claire Hall, Chair  
Sami Jo Difuntorum  
Mary Ferrell  
Maggie Harris  
Mary Li  
Erin Meechan  
Javier Mena  
Kristy Willard  
Sharon Nickleberry Rogers



TIME	TOPIC	SWHP Priority	ACTION
9:00	<b>Meeting Called to Order</b>		Call Roll
9:05	<b>Review &amp; Follow-up Action Items</b>		Briefing
9:15	<b>Report of the Chair</b>		Briefing
9:30	<b>Report of the Director</b>		Briefing
9:45	<p><b>Affordable Rental Housing Division (pg. 04)</b> Natasha Detweiler-Daby, <i>Director of Affordable Rental Housing Division</i></p> <ul style="list-style-type: none"> <li>• <a href="#">Public Hearing</a> Comments in accordance with <a href="#">ORS 456.561</a></li> <li>• Transactions: <i>Tai Dunson-Strane, Assistant Director Production; Roberto Franco, Deputy Director Development</i> <ul style="list-style-type: none"> <li>o Barbur Apartments</li> <li>o Orchard Park Apartments</li> <li>o Peaceful Villa</li> </ul> </li> <li>• Conduit Charge Recommendation: <i>Kelso Brasunqs, Financial Strategy Analyst, Rick Ruzicka, Assistant Director Policy and Planning</i></li> <li>• Qualified Allocation Plan and ORCA Verbal Update: <i>Natasha Detweiler-Daby, Director</i></li> <li>• Moderate Income Revolving Loan Program Briefing (memo only): <i>Rick Ruzicka, Assistant Director Planning and Policy</i></li> </ul>		<p>Decisions</p> <p>Briefings</p>
11:00	<b>Break</b>		
11:15	<p><b>Homeownership Division (pg. 29)</b> <i>Keeble Giscombe, Director of Homeownership Division</i></p> <ul style="list-style-type: none"> <li>• Flex Lending Down Payment Assistance (DPA) Terms Follow-up: <i>Scott Shaw, Assistant Director of Homeownership Lending; Matthew Harris, Assistant Director of Capital Markets</i></li> </ul>		Decision
11:45	<p><b>Diversity, Equity, and Inclusion (pg. 31)</b> <i>Chelsea Bunch, Director of Equity, Diversity &amp; Inclusion</i></p> <ul style="list-style-type: none"> <li>• OHCS Language Accessibility: <i>Magda Bejarano B., Language Services Policy Advisor</i></li> <li>• 2024 Tribal Government to Government Report: <i>Timothy Mahern-Macias, Tribal Liaison</i></li> </ul>		Briefings
12:30	<b>Meeting Adjourned</b>		

The Housing Stability Council will provide [public hearing](#) time in accordance with ORS 456.561. Council's review of loan, grant or other funding award proposals under this section shall be held at a public hearing of the council. A public hearing is a formal proceeding held in order to receive testimony from all interested parties, including the general public, on a proposed issue or action. A public hearing is open to the public but is regarding a specific proposal/project.

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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Claire Hall, Chair  
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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

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**OREGON HOUSING** *and*  
**COMMUNITY SERVICES**

725 SUMMER STREET NE, SUITE B | SALEM, OR 97301  
503-986-2000 | [www.oregon.gov/OHCS](http://www.oregon.gov/OHCS)

Date: February 7, 2025

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

From: Tai Dunson-Strane, Assistant Director, Transactions  
Hattie Iott, Housing Production Manager  
Roberto Franco, Assistant Director, Development Resources  
Natasha Detweiler-Daby, Director, Affordable Rental Housing

Re: **Approval for Resolution #2025-02-07**

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**Motion:** Approve the Resolution #2025-02-07 recommendations for the following projects:

**BOND RECOMMENDED MOTION:** Move approval of Pass-Through Revenue Bond Financing in an amount up to and not to exceed \$ 39,000,000 to 8205 Barbur Limited Partnership for the new construction of Barbur Apartments, subject to the borrower meeting OHCS, Portland Housing Bureau, Key Bank Real Estate Capital Corp, and Raymond James' Affordable Housing underwriting, closing criteria, and documentation satisfactory to legal counsel and Treasurer approval for the bond sale.

**BOND RECOMMENDED MOTION:** Move approval of Pass-Through Revenue Bond Financing in an amount up to and not to exceed \$ 45,700,000 to Orchard Park Preservation Partners Limited Partnership for the acquisition, rehabilitation and construction of Orchard Park Apartments, subject to the borrower meeting OHCS, Bellwether Enterprise Real Estate Capital, LLC and Enterprise Housing Credit's underwriting, closing criteria, and documentation satisfactory to legal counsel and Treasurer approval for the bond sale.

**BOND RECOMMENDED MOTION:** Move approval of Pass-Through Revenue Bond Financing in an amount up to and not to exceed \$ 56,647,500 to Peaceful Villa Limited Partnership for the acquisition, rehabilitation and new construction of Peaceful Villa Property, subject to the borrower meeting OHCS, JPMorgan Chase, and Richman Capital (USA Institutional Peaceful Villa LLC)'s underwriting, closing criteria, and documentation satisfactory to legal counsel and Treasurer approval for the bond sale.

At the upcoming Housing Stability Council meeting, we will be presenting three (3) transactions -4% LIHTC/Conduit Bond and for Council approval.



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The projects included in the Resolution following this memo were approved by the OHCS Finance Committee or is scheduled for an approval by the Finance Committee. In this memo we are providing you with a high-level summary of the recommended projects. More detailed information regarding the projects and the additional funding recommendation can be found in the individual project summaries.

#### **4% LIHTC Applications**

The 4% LIHTC program has focused primarily on helping OHCS meet its unit production goals; often in partnership with policy aligned gap funds from OHCS or other public funding partners. All applications that are submitted and conform to OHCS's underwriting guidelines and the baseline policy standards established across programs are brought to OHCS's Finance Committee for review and approval, in addition to transactional authority given through Housing Stability Council resolution.

All applications are subject to underwriting and programmatic requirements and goals established under the Qualified Allocation Plan, General Policy and Guideline Manual (GPGM) and MWESB/SDVBE Compliance Manual are eligible to be considered for funding. All applications proposed a percentage target of MWESB contractors and subcontractors above the minimum standards set forth in the OHCS MWESB Compliance Policy, and all have an Affirmatively Furthering Fair Housing Marketing Plan including a Tenant Selection Plan that will market to those least likely to apply. All projects sponsored have signed our Diversity, Equity, and Inclusion (DEI) Agreement.

#### **Funding Recommendation:**

We are recommending funding reservation for three (3) projects. These projects will create **540** units of new affordable housing communities across the state. The recommendation is for an award totaling over \$141 million.



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**Projects with Other OHCS gap funding**

<b>Project Name</b>	<b>County</b>	<b>Total Units</b>	<b>Sponsor</b>	<b>Underwriting Stage</b>
<b>Barbur Apartments</b>	Multnomah	<b>150</b>	Innovative Housing, Inc.	Schedule Approval by FC 2/4/2025
<b>Peaceful Villa</b>	Multnomah	<b>166</b>	Home Forward	Schedule Approval by FC 2/4/2025
<b>Orchard Park Apartments</b>	Marion	<b>224</b>	Aberdeen Capital and Salem Housing Authority	Schedule Approval by FC 2/4/2025

**Total 540**

See following resolution and project summaries.



**STATE OF OREGON**  
**OREGON HOUSING AND COMMUNITY SERVICES**  
**HOUSING STABILITY COUNCIL**

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**RESOLUTION No. 2025 – 2-07**  
**ADOPTED: FEBRUARY 7TH, 2025**

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**A RESOLUTION OF THE HOUSING STABILITY COUNCIL APPROVING PASS-THROUGH REVENUE BONDS AND HOUSING PROGRAM FUNDING TO FINANCE THE PROJECTS DESCRIBED HEREIN, SUBJECT TO THE BORROWERS AND PROJECTS MEETING CERTAIN PROGRAM REQUIREMENTS, CLOSING AND OTHER CONDITIONS AS DESCRIBED HEREIN; AND AUTHORIZING AND DETERMINING OTHER MATTERS WITH RESPECT THERETO.**

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**WHEREAS**, the State of Oregon (the “**State**”), acting by and through the State Treasurer (the “**Treasurer**”) and the Oregon Housing and Community Service Department (the “**Department**”) and collectively with the State and the Treasurer, the “**Issuer**”), is authorized, subject to Housing Stability Council (the “**Council**” or “**HSC**”) review and approval, pursuant to Oregon Revised Statutes (“**ORS**”) Chapter 286A and ORS Sections 456.515 to 456.725, inclusive, as amended (collectively, the “**Act**”) and Oregon Administrative Rules (“**OAR**”) Chapter 813, Division 35 pertaining to the Department’s Pass-Through Revenue Bond Financing Program (the “**Conduit Bond Program**”), to issue revenue bonds, notes and other obligations (collectively, “**Bonds**”) and to loan the proceeds thereof to borrowers (“**Borrowers**”) in order to finance certain costs associated with the acquisition, rehabilitation, development, construction, improvement, furnishing and/or equipping of multifamily housing;

**WHEREAS**, through the federal 4% Low-Income Housing Tax Credit Program (“**LIHTC Program**”), the Department allocates tax credits (the “**Credits**”) in accordance with the Act and OAR Chapter 813, Division 90 pertaining to the Department’s LIHTC Program;

**WHEREAS**, through the Department’s various financing programs as authorized by the Act and ORS Chapter 458 (collectively, “**Housing Programs**”), the Department, subject to the Council’s review and approval, provides loans, grants and other financing pursuant to the Act, ORS Chapter 458, applicable OARs and in conformance with Department policies (the “**Housing Program Funding**”). The Conduit Bond Program, the LIHTC Program and the Housing Programs are collectively referred to herein as the “**Programs**”; and

**WHEREAS**, the Department’s Finance Committee (the “**Committee**” or “**FC**”) has (i) approved the allocation of Credits, (ii) recommended to the Council the issuance of Bonds, and (iii) approved or recommended providing the Housing Program Funding to finance each of the affordable multifamily rental projects as listed on Exhibit A attached hereto (each an “**FC-Approved Project**” and collectively, the “**FC-Approved Projects**”); and

**WHEREAS**, Council desires to accept the recommendations of the Committee by (i) approving the Bonds and directing the Department to request that the State Treasurer issue the Bonds and (ii) further ratifying and/or approving providing the Housing Program Funding to finance each of the FC-Approved Projects; and

**WHEREAS**, the further Council desires to (i) approve the Bonds and direct the Department to request that the Treasurer issue the Bonds and (ii) further ratify and/or approve providing the Housing Program Funding to finance each of the affordable multifamily rental projects as listed on **Exhibit B** attached hereto (each a “**Proposed Project**” and collectively, the “**Proposed Projects**”), in each case subject final approval of the Projects by the Committee, including the allocation of Credits by the Committee to each of the Projects; and

**NOW, THEREFORE**, be it resolved by the Council as follows:

**SECTION 1. HSC APPROVAL.** The Council hereby acknowledges that it has reviewed the information and materials included in **Exhibit A** and **Exhibit B** attached hereto describing the Bonds and the Housing Program Funding, each FC-Approved Project and each Proposed Project (each a “**Project**” and collectively, the “**Projects**”) and the financing of each of the Projects, and hereby approves the issuance of the Bonds for the financing of each of the Projects, as described therein. Subject, in the case of each Project, to the Borrower’s compliance with all legal and other requirements of the Act and the applicable Programs and confirmation by the Department, including final approval by the Committee in the case of each Proposed Project, that the conditions described in Section 2 below have been satisfied, the Council finds that no further meeting or action of the Council is needed for the Department to request and the Treasurer to proceed with the issuance of the Bonds and for the Department to proceed with the financing of the Project.

**SECTION 2. CONDITIONS TO ISSUANCE, SALE AND DELIVERY OF BONDS.** The Council hereby approves the issuance, sale and delivery of the Bonds for each of the Projects. For each Project, such approval is subject to any remaining final approval(s) that may be required by the Committee (including the allocation of Credits to and final approval of each Proposed Project by the Committee) and/or the Department’s Executive Director (or her designee), and further subject to the Borrower meeting all requirements of the applicable Programs and satisfying all closing and funding conditions, including:

- (A) completion by the Department of all necessary due diligence related to the Project and the financing, consistent with applicable Program requirements, Department policies and practices;
- (B) the absence of any material change to the Project or the financing following the adoption of this Resolution;
- (C) confirmation that all legal and other requirements of the Act and the Conduit Bond Program for the issuance, sale and delivery of the Bonds have been satisfied, as determined by the Department, the Oregon Department of Justice and Bond Counsel; and
- (D) confirmation that all legal and other requirements of the Act and the Programs have been satisfied, as determined by the Department and the Oregon Department of Justice.

**SECTION 3. COUNCIL REVIEW, APPROVAL AND PUBLIC MEETING.** The Council hereby acknowledges that it has reviewed the information and materials included in **Exhibit A** and in **Exhibit B** attached hereto describing the Projects and the financing of each of the Projects, including the Bonds, and conducted such additional review and made such additional inquiry, if any, as it determined to be necessary or appropriate, in compliance with the Council’s obligations



under ORS 456.561(3) and other relevant authority, to review, and to approve or disapprove the financing of the Projects. The Council hereby further acknowledges that the adoption of this Resolution and the HSC approval set forth herein has been made at a public meeting of the Council as required by ORS 456.561(4) and other relevant authority, and that such meeting has been conducted in accordance with applicable law, including any required advance public notice of such meeting. Further, the Council acknowledges that in connection with the adoption of this Resolution and the HSC approval set forth herein, opportunity has been provided to the public to testify or otherwise provide public comment on the Projects and any other matters directly related thereto.

**SECTION 4. EFFECTIVENESS; CONFLICTING RESOLUTIONS.** This Resolution shall be effective immediately upon its adoption. Any prior resolutions of or other previous actions by the Council and any parts thereof that are in conflict with the terms of this Resolution shall be, and they hereby are, rescinded, but only to the extent of such conflict.

*[Signature follows next page]*

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## CERTIFICATION OF RESOLUTION

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The undersigned does hereby certify that I am the duly appointed, qualified and acting Chair of the Oregon Housing and Community Services Oregon Housing Stability Council (the “**Council**”); that the foregoing is a true and complete copy of Resolution No. 2025-2-07 as adopted by the Council at a meeting duly called and held in accordance with law on February 7th, 2025; and that the following members of the Council voted in favor of said Resolution:

\_\_\_\_\_  
\_\_\_\_\_

the following members of the Council voted against said Resolution:

\_\_\_\_\_  
\_\_\_\_\_

and the following members of the Council abstained from voting on said Resolution:

\_\_\_\_\_  
\_\_\_\_\_

In witness whereof, the undersigned has hereunto set her hand as of this 7th day of February 2025

\_\_\_\_\_  
Chair

**EXHIBIT A**

**EXHIBIT B**

**PROPOSED PROJECT**

- 1- **Barbur Apartments (FC – Meeting Schedule for 2/4/2025)**
- 2- **Peaceful Villa (FC – Meeting Schedule for 2/4/2025)**
- 3- **Orchard Park Apartments (FC - Meeting Schedule for 2/4/2025)**



**OREGON HOUSING** *and*  
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**SUMMARY**

Project Name:	Barbur Apartments		
City:	Portland	County:	Multnomah
Sponsor Name:	Innovative Housing, Inc. (IHI)		
Management Agent:	NW Real Estate Capital Corp		
Urban/Rural:	Urban	Total Units:	150
		Total Affordable Units:	149
# Rent Assisted Units:	38	Units by Size & Affordability:	47 one beds @ 60% MFI 82 two-beds @ 60% MFI 16 three-beds @ 60% MFI 4 four-beds@ 60% MFI 1 two-bed Manager's Unit
Cost Per Unit:	\$511,974	Construction Type:	New Construction
Affordability Term(s):	LIHTC – 30 years LIFT – 30 Years	# of Units with Non-OHCS Requirements:	0
<b>Funding Request</b>		<b>Funding Use</b>	
LIFT Request:	\$4,048,772	Acquisition	\$6,544,275
4% LIHTC:	\$3,369,476 annual allocation	Construction	\$50,080,490
Conduit Bonds	Up to \$39,000,000	Development	\$20,171,366
		Total:	\$76,796,131

**PROJECT DETAILS**

Project Description:	Barbur Apartments will transform an equipment rental business on a major transit corridor into a vibrant family-focused community with 150 affordable apartments. New investment is coming to Portland's SW Corridor and Barbur Apts is intended to limit displacement of the communities that call this neighborhood home. Barbur Apts will offer 1, 2, 3, and 4-bedroom units; 21% of the units (32) will be affordable to households with incomes under 30% MFI and another 25 units will be affordable to households earning 45% MFI. Other site amenities include: a large outdoor play area, community laundry facilities, bike parking, on-site resident service and management offices, and two large community rooms. All 3 and 4-BR units will have in-unit washers and dryers. Residents will benefit from wraparound support services and a rich array of culturally specific services designed to meet the needs of future residents, including immigrant and refugee families. Barbur Apartments and its
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**Barbur Apartments – Housing Stability Council**

	<p>150 units are a stand-alone project and not subject to a master plan development. Closing is anticipated to be in February 2025.</p>
<p>Partnerships to Serve Communities of Color:</p>	<p>In an effort to prevent displacement and serve communities of color that are currently living, working, and worshipping in the SW Corridor, IHI’s outreach and service plans focus on immigrant and refugee communities, specifically Muslim and East and North African households. There is a significant Muslim community in this neighborhood - the City’s largest Mosque is located nearby, among others, along with many Muslim religious and service organizations.</p> <p>Resident Services at Barbur Apartments will be provided by 1.5 FTE Resident Services Coordinators. IHI will work in collaboration with the Immigrant and Refugee Community Organization (IRCO) to identify and hire at least one Resident Services Coordinator with specific cultural and language expertise to serve our target population and will provide a second half-time position to further support residents. A combination of two RSCs will be able to provide culturally specific supports along with IHI’s full resident program and foster a vibrant housing community while helping residents meet basic needs, maintain their housing, and access opportunities for improved household stability. These services and the design of the community spaces will be centered on feedback from the Muslim and immigrant/refugee community, as well as other communities of color with ties to the SW Corridor.</p> <p>In designing the service plan for Barbur Apartments, IHI has developed several partnerships with several other culturally specific and geographically specific service providers to complement its on-site resident services program and deliver a full range of family-focused support services for residents at Barbur Apartments. These partnerships/relationships include:</p> <ul style="list-style-type: none"> <li>• Islamic Social Services of Oregon State (ISOS) - Priority housing referrals, ongoing family stabilization services to residents, including rent assistance, and collaboration with IHI on community outreach to the Muslim community</li> <li>• Black Parent Initiative (BPI) - Priority housing referrals, parenting and early childhood development services to residents, and assistance with community outreach</li> <li>• Neighborhood House - Family stabilization services including access to food, youth programs, senior programs, culturally responsive parenting classes, after-school academic support</li> <li>• The Community Services Network - Network of existing service providers in SW Portland, including many culturally specific providers that serve the immigrant and refugee community in the SW Corridor</li> </ul>



## Barbur Apartments – Housing Stability Council

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<p>Reaching Underserved Communities:</p>	<p>IHI has outreach partnerships with culturally specific service agencies (Immigrant and Refugee Community Organization, Islamic Social Services of Oregon State, and Black Parent Initiative) to help connect with the communities they serve and make introductions to community leaders and institutions such as mosques, churches, schools, and businesses. IHI has/will also connect with SW Corridor stakeholders via the SW Corridor Equity Coalition. IHI will use a variety of methods to engage these communities, including focus groups, community meetings, and different technology (SMS texting, social media, flyers) with all modes translated into multiple languages. They have intentionally reserved areas of the project design specifically for community guidance in planning the project features, especially community space, open space and unit space planning. Additionally, early community connections that we have already made provided feedback on washer/dryers in units for large families, and so we will be including washers/dryers in units for all the three-bedroom and four-bedroom units.</p>
<p>MWESB Target:</p>	<p>Innovative Housing, Inc. and TODD Construction are committed to meeting the Metro Region 1 goal of 30%.</p>
<p>Alignment with Statewide Housing Plan:</p>	<ul style="list-style-type: none"> <li>• Equity and Racial Justice</li> <li>• Affordable Rental Housing</li> </ul>
<p>The LIFT program requires that all project sponsors sign a Diversity, Equity, and Inclusion (DEI) agreement.</p>	
<p>Upon Housing Stability Council approval of the established conduit bond funding limit, ultimate approval will be based on conformance with OHCS underwriting standards and due diligence and is delegated to OHCS Finance Committee and the Executive Director.</p>	



**Barbur Apartments – Housing Stability Council**

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SUMMARY			
Project Name:	Orchard Park		
City:	Salem	County:	Marion
Sponsor Name:	Aberdeen Capital		
Management Agent:	Cirrus Asset Management, Inc.		
Urban/Rural:	Urban	Total Units:	224
		Total Affordable Units:	224
# Rent Assisted Units:	N/A	Units by Size & Affordability:	64 one-BR units @ 60% AMI 95 two-BR units @ 60% AMI 63 three-BR units @ 60% AMI 1 two-BR Manager unit 1 three-BR Manager unit
Funding Request		Funding Use	
LIFT Request:	N/A	Acquisition	\$51,000,000
4% LIHTC:	\$3,529,299 (Annual Allocation)	Construction	\$19,700,410
GHAP:	\$23,000,000 (Awarded 2023)	Development	\$18,637,591
Conduit Bonds	up to \$45,700,000	Total:	\$89,338,001

PROJECT DETAILS	
Project Description:	<p>Orchard Park Apartments is a 224-unit multifamily property originally constructed and placed in service with 9% LIHTC in 1993. The project’s LIHTC extended use agreement expired on December 31, 2021, which put units at risk of converting to market rate rents.</p> <p>Aberdeen Capital and the Salem Housing Authority collaborated to acquire the property in July 2023. The project received 23MM in OHCS Preservation/ GHAP funds, 20MM was allocated to acquire the property and 3MM was allocated to address short term repairs to prevent residents from being displaced. Preservation funds restricted units to 80% AMI and prevented the market rate conversion of the property.</p> <p>Rent restrictions at the property will return to 60% AMI after the project is approved and reaches financial closing. Returning rent restrictions to 60% AMI will provide housing stability for current residents and help maintain the affordable housing supply in the Salem area.</p>





## Orchard Park – Housing Stability Council

	<p>The project’s scope of work includes improvements that will address capital needs and deferred maintenance at the property. Salem Housing Authority will assist with the successful operation of the project after financial closing.</p> <p>Funding the project is necessary to maintain and improve affordability and to provide safe, sustainable affordable housing for the community in an area with rapidly rising market rents.</p>
<p>Partnerships to Serve Communities of Color:</p>	<p>Aberdeen Capital will enter into a Memorandum of Understanding with the Salem Housing Authority (SHA), a culturally responsive organization who will provide initial services to residents as the property undergoes acquisition, rehabilitation, and stabilization.</p> <p>Additionally, SHA will provide tenant access to housing and supportive services and provide tools for residents to create a community and integrate residents with the surrounding area as well as interpretation, translation, and communication in alternative formats.</p>
<p>Reaching Underserved Communities:</p>	<p>This project will ensure residents of this existing community remain in safe and stable housing. When units become available, advertising efforts to fill vacancies will target those “least likely to apply” The management agent and staff members are trained in Affirmative Fair Housing Marketing Plan guidelines and best practices to ensure the Fair Housing Act guidelines are followed.</p> <p>SHA will ensure that Residents Services Coordinators assigned to the project are knowledgeable of culturally specific organizations in the community and that relationships with these providers are established, so that referrals are successfully and appropriately made.</p> <p>This project will provide affordable family sized units.</p> <ul style="list-style-type: none"> <li>• 95 two-bedroom/two-bathroom units of 982 square feet</li> <li>• 63 three-bedroom/two-bathroom units of 1,170 square feet</li> </ul>
<p>MWESB Target:</p>	<p>Aberdeen Capital and LMC Construction are committed to meeting the Region 2 goal of 20%.</p>
<p>Alignment with Statewide Housing Plan:</p>	<ul style="list-style-type: none"> <li>• Affordable Rental Housing</li> </ul>



## Orchard Park – Housing Stability Council

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The applicant has signed a DEI agreement and is committed to following diversity, equity, and inclusionary ideals and standards.

Upon Housing Stability Council approval of the established conduit bond funding limit, ultimate approval will be based on conformance with OHCS underwriting standards and due diligence and is delegated to OHCS Finance Committee and the Executive Director

### Rendering: Project Layout





**OREGON HOUSING *and*  
COMMUNITY SERVICES**

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SUMMARY			
Project Name:	Peaceful Villa		
City:	Portland	County:	Multnomah
Sponsor Name:	Home Forward		
Management Agent:	Home Forward		
Urban/Rural:	Urban	Total Units:	166
		Total Affordable Units:	166
# Rent Assisted Units:	166	Units by Size & Affordability:	14 efficiency @ 60% 61 one br @ 60% 53 two br @ 60% 34 three br @ 60% 4 four br @ 60%
Cost Per Unit:	\$420,228	Construction Type:	New Construction
Affordability Term(s):	LIHTC – 60 years OAHTC – 20 years GHAP – 60 years	# of Units with Non-OHCS Requirements:	0
Funding Request		Funding Use	
4% LIHTC:	\$3,741,323 Annual Allocation	Acquisition	\$5,980,000
GHAP:	\$10,000,000	Construction	\$69,757,814
Preservation:	\$8,750,000	Development	\$28,336,439
OAHTC:	\$30,000,000		
Conduit Bonds	up to \$56,647,500	Total:	\$104,074,253

PROJECT DETAILS	
Project Description:	Peaceful Villa will be the redevelopment of a Home Forward owned 70-unit public housing project into a new 166-unit family project that responds to Portland’s housing crisis. While preserving 70 rental subsidies and adding 96 more subsidized units, Peaceful Villa will have a total of 166 subsidized units. It more than doubles the density of the current Home Forward site in a high opportunity neighborhood. The redevelopment relies on HUD’s Rental Assistance Demonstration (RAD) program as a rental subsidy source. Utilizing RAD means that there are RAD-specific relocation rules that apply to the project, which includes temporary relocation of 66 households. This will be the seventeenth Home Forward RAD conversion since 2018 subject to both RAD and URA requirements. Home Forward is therefore deeply familiar with both sets of federal relocation requirements that apply to Peaceful Villa and the relationships between them.



**Peaceful Villa – Housing Stability Council**

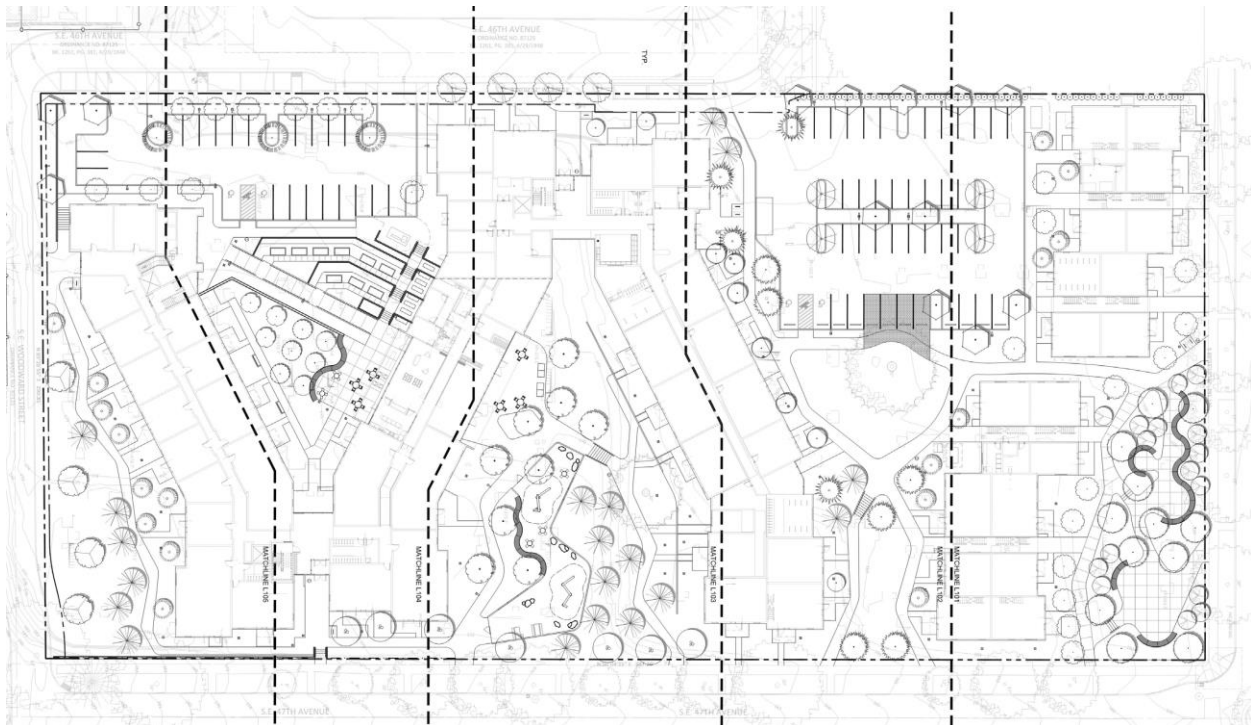
	<p>The project will include a pair of 3-story walk-up buildings, and a large 4-story midrise with elevator service. All three buildings will have secured entry systems with enclosed hallways. Common amenities will be available within the mid-rise building and will include three elevators, a vestibule with mail room, leasing office, and resident services office, a food pantry, multiple tenant clubhouse spaces, a kid’s play area, a computer lab, and two outdoor patio spaces. There will also be outdoor amenities including a variety of playground, courtyard, and community garden spaces, and two surface parking lots. There will be two small laundry rooms (one in a walk-up building and one in the mid-rise building) with a combined total of 7 washers and 7 dryers, but all units will have washer/dryer hookups. The laundry rooms are provided so that tenants without appliances will have access to on-site laundry, and to provide another option for households that may require assistance with their laundry from third parties. The mid-rise building is designed with an approximate “W” shape that creates several terraced spaces within the folds of the building. The intent with this design is to preserve a low-density aesthetic on the site even with a higher site coverage and unit/acre density compared with the previous use.</p> <p>Peaceful Villa and the 166 units are a stand-alone project and not subject to a master plan development. Closing is anticipated to be February 20, 2025</p>
<p>Partnerships to Serve Communities of Color:</p>	<p>Home Forward and the Immigrant and Refugee Community Organization (IRCO) have an MOU. As a community-based organization, IRCO empowers children, youth, families, and elders from around the world to build new lives and become self-sufficient by providing more than 200 culturally and linguistically specific social services. IRCO’s vision is to be a leader of community driven, innovative programs delivered by compassionate staff who create equitable services that empower immigrants, refugees, and underserved communities. IRCO will offer prioritized access for immigrants and refugees for up to half of the 166 apartments. Home Forward will provide general resident services to all Peaceful Villa households. Examples of Services that could be provided by IRCO: Family Programs, Children Programs, Youth Programs, Senior Programs, Immigration Legal Services, and Workforce Development.</p>
<p>Reaching Underserved Communities:</p>	<p>IRCO offers a wide range of culturally specific and responsive housing and stabilization supports to help individuals and families obtain or remain in safe and stable homes in Multnomah, Washington, Clackamas, and Malheur Counties. Services include outreach and engagement, housing navigation and placement, case management, eviction prevention, utilities assistance, and rental assistance. IRCO’s International Language Bank (ILB) provides in-person, telephonic, and remote video interpretation and translation services, specializing in providing culturally appropriate, multilanguage translation. ILB also offers Healthcare Interpreter Training, preparing participants to meet Oregon Health Authority’s requirements to become qualified or certified healthcare interpreters or are interested in pursuing career options in language services.</p>



# Peaceful Villa – Housing Stability Council

<p>MWESB Target:</p>	<p>This project is expected to meet 30% MWESB participation for construction activities.</p>
<p>Alignment with Statewide Housing Plan:</p>	<p>Equity and Racial Justice Affordable Rental Housing</p>
<p>Upon Housing Stability Council approval of the established conduit bond funding limit, ultimate approval will be based on conformance with OHCS underwriting standards and due diligence and is delegated to OHCS Finance Committee and the Executive Director</p>	

## Rendering: Project Layout



From appraisal



Entry along 47th Avenue



46th Avenue Looking South



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503-986-2000 | [www.oregon.gov/OHCS](http://www.oregon.gov/OHCS)

**Date:** February 7, 2025  
**To:** Housing Stability Council Members  
Andrea Bell, Executive Director  
**From:** Kelso Brasunas, Financial Strategy Analyst  
Rick Ruzicka, Assistant Director Planning and Policy  
Natasha Detweiler-Daby, Director Affordable Rental Housing Division  
**Re:** Conduit Bond Charge Recommendation

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**Motion: Approve the February 2025 Conduit Bond Charge recommendation for Affordable Rental Housing Division conduit bond issuance.**

**Background:**

This month we are bringing back a recommendation for proposed updates to the Housing Stability Council adopted charges related conduit bond issuance. Conduit bond issuance for affordable rental housing is where OHCS serves as the conduit between the bond purchasers and a lender who invests bond proceeds into the eligible projects. The lender assumes responsibility for servicing the debt and required repayment and OHCS as the issuer assumes federal compliance responsibilities alongside up-front diligence related to the investment.

The updates to the charges were initially introduced at the December 2024 Housing Stability Council meeting, and are being brought back as a formal recommendation following public input and feedback.

**Proposal and Feedback:**

The recommended update to the conduit bond charges follows this memo; changes to the conduit charges include:

1. Removing the prior issuance charge cap;
2. Adding an annual charge on the outstanding balance to allow the owner to pay over a longer period of project operations and reduce the up-front financial need at closing; and,
3. Removing the draw down charge.

OHCS solicited public feedback on the proposal in December 2024, in tandem with the Qualified Allocation Plan public comment period. The main feedback themes related to conduit charges are summarized below.



1. Concern related to impacts on project feasibility given the increased costs of issuance associated with the removal of the cap on charges
  - OHCS understands this change will impact projects financially, and sometimes might require more subsidy. As of June 2024, costs associated with conduit bond issuance are now allowed to generate eligible basis for the computation of LIHTC, which will offset some of the increase in issuance charges that sponsors may face.
2. Questions related to the comparability of the OHCS recommended charges with other issuers in the market.
  - OHCS analyzed other state HFA charges and found that our charges were significantly smaller compared to other states. Importantly, OHCS differs from most other states in that it is a one-stop shop for many types of funding including tax credits, subsidies and bonds. In other states, sponsors apply to several organizations for their funding, each with their own charges and processes.
3. Need for clarification about what is meant by annual fee on balance
  - OHCS clarifies that it is an annual charge on the outstanding (or drawn) balance of the total bond, that continues yearly until the bond is fully paid off. The charge is assessed on whatever is outstanding, so this can include short-term.
4. Request for clarification regarding allowances for related party deals (when the bond holder and LIHTC investor are the same entity)
  - While many states ban related parties, OHCS will continue to allow related parties deals, understanding that it's often efficient for sponsors to only work with one entity. OHCS will work with advisors (financial advisors, bond counsel) to get as close to the charge structure as possible without violating U.S. Treasury program investment rules, understanding that we will often not be able to collect the full charge on these projects.





**February 2025 Conduit Charge Recommendation:**

<b>Fees</b>	<b>Description</b>	<b>Current Structure</b>	<b>Recommended 2025 update</b>
<b>Application Charge</b>	Application charge	\$1,500	\$1,500
<b>Issuance Charge</b>	Charged up front on the full tax-exempt portion	1.5% (150k cap)	1.5% (no cap)
<b>Draw Down Charge</b>	At closing, the bonds are either fully drawn or partially drawn. If the bonds are partially drawn, the draw down charge is applicable and charged up front on both taxable and tax-exempt.	0.50%	none
<b>Annual Charge on Balance</b>	Charged annually on the remaining outstanding balance of the full bond (tax-exempt and taxable if there is a taxable tail)	none	0.25%

The updated charges will affect projects that submit fund applications after the February 7, 2025 Housing Stability Council meeting (if approved), the updates will not impact projects currently in the funded production pipeline.





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Date: February 7, 2025

To: Housing Stability Council Members  
Andrea Bell, Executive Director

From: Natasha Detweiler-Daby, Director, Affordable Rental Housing Division  
Rick Ruzicka, Assistant Director of Affordable Rental Housing Policy and Planning  
Brit McLean, Operations & Policy Analyst  
Patricia Akers, Operations & Policy Analyst  
Brittany Kasim Carew, Operations & Policy Analyst

Re: Moderate-Income Revolving Loan Program Phase I Launch Briefing – Senate Bill 1537 (2024)

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This briefing memo serves to brief Housing Stability Council related to the imminent Phase I Program Launch of the Moderate-Income Revolving Loan (MIRL) Program. MIRL is a statutory program that OHCS is responsible for implementing, which provides local jurisdictions access to loans to support development of housing for households earning up to 120% Area Median Income (AMI).

The forthcoming Phase I launch will allow jurisdictions ready to pursue MIRL funds to support local development to proceed with that work. Phase II of the program launch is anticipated in the third quarter of 2025 and will serve to provide supports for jurisdictions who require additional capacity to engage in the work, including a program tool kit, trainings, and one on one support.

This program represents a critical expansion of funding tools available in the state to support production driven by local communities seeking to address their housing need. Unlike traditional resources for housing development, in this case OHCS is not investing directly in the housing, but instead providing participating jurisdictions with loans to lead the work locally.

### **Summary**

The MIRL Program was established by Senate Bill 1537 in the 2024 Legislative Session, which allocated \$75 million in General Fund resources to capitalize the Housing Project Revolving Loan Fund. The MIRL Program is intended to support and expand very low, low- and moderate-income housing production across the state through a revolving loan structure.

[SB 1537](#) authorizes Oregon Housing and Community Services to make zero-interest loans to cities and counties, or “Sponsoring Jurisdictions,” that have adopted a program to fund very low, low- or moderate-income housing projects. A Sponsoring Jurisdiction then uses the loan proceeds to award grants to developers to fund eligible housing projects. The MIRL Program is limited to the development of new housing or conversions of non-residential structures to housing for



households earning 120% or less of the AMI. The improvements constituting the eligible housing Project will be exempt from property taxes for an assumed period of 10 years. Instead of paying property taxes on the improvements, the taxpayer will pay a predetermined annual fee for the duration of the property tax exemption. That annual program fee will repay the loan that OHCS made to the sponsoring jurisdiction.

MIRL Program funds may be used for costs related to infrastructure, predevelopment, construction, and land write-downs. Housing projects utilizing MIRL Program funds will be subject to Affordability Requirements for the term of the Loan or 10 years, whichever is greater. As loans are paid back to OHCS through the program fee structure, the department can issue new loans for additional very low, low- or moderate-income housing development.

### External Partner Engagement

Through formal engagement sessions and agency participation in established partner meetings, staff have sought input from key partners and prospective grantees to meet implementation goals for the new program within a compressed timeline. The engagement process has been utilized to ensure clarity and understanding in the following key areas of this very technical bill:

- Administrative division of labor between the agency, sponsoring jurisdictions, assessors, and developers
- External process mapping
- The need for additional guidance, partner support and technical assistance
- Education and understanding of the bill and how it might assist communities meet needs related to moderate income and affordable housing
- Future Training needs

The external engagement process has daylighted numerous program considerations that OHCS has attempted to address through implementation strategies align with the application process.

### Internal Engagement

Planning & Policy staff have worked diligently to explore, educate, support and provide instruction around internal set up and process to establish a workflow and meet OHCS responsibilities as related to the bill requirements. This has included regular and irregular meetings with Division and Agency wide staff, including working with Operations, Pro-Link Systems staff, Budget, Human Resources, Research, Program, Production and Accounting amongst others. As new staffing related to this program begins to be onboarded, Planning & Policy will continue to provide education and support while we transition from a stand-up role to a support role after program opening.

### Driven by Community

OHCS' role is a conduit for Sponsoring Jurisdictions to access MIRL development capital; priorities and characteristics of properties financed through this strategy will be driven by local communities and planning processes. OHCS will review MIRL fund applications from jurisdictions for accuracy and completion, which will include a verification of an Affirmative Fair Housing Marketing Plan alongside demonstration that the public funding is critical to ensure project viability. Other equity



considerations such as MWESB are strongly encouraged by OHCS with OHCS ready to provide support and technical assistance as part of the phase II role out.

### **Progress Toward Phase I Program Launch – In Progress**

- Have held more than ten (10) engagement sessions and small discussion groups
- Integration of external survey responses into program materials
- Program Manual in final editing stage
- Oregon Administrative Rulemaking underway
- DOJ legal sufficiency review of program materials
- Creating internal/external trainings and process workflows
- Continuing to fill positions (11 total FTE positions)
- Data systems and information transferal set up via Procorem for use by new partners

Phase I launch will provide for the ability of Sponsoring Jurisdictions that need little support and are ready to go, the ability to apply immediately. Phase II will aim to launch in the third quarter 2025. Phase II of the program launch is around providing supports for partners including a program tool kit, trainings, and one on one support.

### **Next Steps**

Staff have largely completed external partner engagement and continue integrating feedback into program materials. Staff continue to work on website development, forms and other materials necessary for program implementation and aim to complete this by mid-February for a program launch. Following this initial launch, OHCS commits to ensuring ongoing response to address any technical concerns and improvement opportunities as partners work to establish this program at the local level.



**TO:** Housing Stability Council Members  
Andrea Bell, Director

**FROM:** Scott Shaw, Homeownership Lending Programs Assistant Director  
Matthew Harris, Capital Markets Assistant Director  
Keeble Giscombe, Director of Homeownership

**DATE:** February 7, 2025

**SUBJECT:** Flex Lending Down Payment Assistance (DPA) Terms Follow-up

**Motion:** Housing Stability Council’s approval to replace the “Due on Sale” permanent Down Payment Assistance (DPA) and adopt fixed DPA terms for FirstHome and NextStep borrowers with an Area Median Income (AMI) below 80% in order to generate more wealth for lower income and underserved Oregonians.

**Current DPA Terms:**

Flex Lending Loan Products								
Effective 11/04/2024	Product	DPA			Rate			
		DPA Amount	Repayable?	DPA Terms	Gov’t (FHA, VA, USDA)		Conv. (FNMA, FHLMC)	
					1st Mtg. Rate	DPA 2nd Mtg. Rate	1st Mtg. Rate	DPA 2nd Mtg. Rate
<b>FirstHome</b> (MBS Based FTHB Products)	All AMI's	No DPA	N/A	N/A	6.125%	N/A	6.375	N/A
	<80% AMI	4% DPA	Silent Second	Permanent	6.250%	Silent	6.500%	Silent
		Focused Demographics 5% DPA	Silent Second	Permanent	6.250%	Silent	6.500%	Silent
	80.01-120% AMI	4% DPA	Repayable	20yr Term	6.250%	7.250%	6.500%	7.500%
		Focused Demographics 5% DPA	Repayable	30yr Term	6.250%	7.250%	6.500%	7.500%
>120% AMI	4% DPA	Repayable	10yr Term	6.250%	7.250%	6.500%	7.500%	
<b>NextStep</b> (Existing Flex Products)	<80% AMI	4% DPA	Silent Second	Permanent	6.625%	Silent	7.125%	Silent
		Focused Demographics 5% DPA	Silent Second	Permanent	6.625%	Silent	7.125%	Silent
	80.01-120% AMI	4% DPA	Repayable	20yr Term	6.625%	7.625%	7.125%	8.125%
		Focused Demographics 5% DPA	Repayable	30yr Term	6.625%	7.625%	7.125%	8.125%
	>120% AMI	4% DPA	Repayable	10yr Term	6.625%	7.625%	7.125%	8.125%

Housing Stability Council in the November 2024 Council meeting approved the implementation of and adoption of rules and guidelines for Flex Lending’s FirstHome and NextStep products. The rules and guidelines as adopted provided a “Silent Second” mortgage with no payments and no interest due for borrowers with an AMI less than 80% structured as a “Due on Sale” mortgage with no fixed term, meaning the DPA loan would have to be repaid.

As part of the approval Council requested the Homeownership and Debt Management Divisions consult with OHCS financial advisors to determine if it were financially viable to provide more favorable terms

for the lower income and underserved Oregonians who receive “Silent Second” mortgages, especially for Focused Demographics borrowers, and report our findings.

In consulting with OHCS financial advisors, several programmatic adjustments and financial models were explored in determining the best course of action in order to create the biggest impact. The findings revealed that for borrowers with an AMI below 80%, the Department could implement fixed DPA terms with full forgiveness on the 4% DPA at 30yrs. and full forgiveness on the 5% Focused Demographics DPA at 15yrs. The impact, while not negligible, extends financial investment for an additional year with a break-even in January 2032 instead of January 2031.

**Proposed DPA Terms:**

Flex Lending Loan Products								
**Proposed**	Product	DPA			Rate			
		DPA Amount	Repayable?	DPA Terms	Gov't (FHA, VA, USDA)		Conv. (FNMA, FHLMC)	
					1st Mtg. Rate	DPA 2nd Mtg. Rate	1st Mtg. Rate	DPA 2nd Mtg. Rate
<b>FirstHome</b> (MBS Based FTHB Products)	All AMI's	No DPA	N/A	N/A	6.125%	N/A	6.375	N/A
	<80% AMI	4% DPA	Silent Second	30yr Term	6.250%	Silent	6.500%	Silent
		Focused Demographics 5% DPA	Silent Second	15yr Term	6.250%	Silent	6.500%	Silent
	80.01-120% AMI	4% DPA	Repayable	20yr Term	6.250%	7.250%	6.500%	7.500%
		Focused Demographics 5% DPA	Repayable	30yr Term	6.250%	7.250%	6.500%	7.500%
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<b>NextStep</b> (Existing Flex Products)	<80% AMI	4% DPA	Silent Second	30yr Term	6.625%	Silent	7.125%	Silent
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		Focused Demographics 5% DPA	Repayable	30yr Term	6.625%	7.625%	7.125%	8.125%
	>120% AMI	4% DPA	Repayable	10yr Term	6.625%	7.625%	7.125%	8.125%

**Program Reception:**

OHCS plan and programmatic framework to increase the number of Oregonians who realize the dream of homeownership has been well received. Since the implementation of FirstHome, just under one third of lenders have completed implementation, yet there has been a flurry of activity.

FirstHome Locks By DPA			
DPA Amt.	Units	LN Amt	DPA
No DPA	74	\$23,362,058	
4%	42	\$13,900,179	\$541,278
Focused Demographics 5%	13	\$4,277,094	\$199,224
<b>Grand Total</b>	<b>129</b>	<b>\$41,539,331</b>	<b>\$740,502</b>

It has resulted in 129 FirstHome loan locks with over \$740k in Down Payment Assistance (DPA) reserved. These numbers represent a 25% increase in locks and a 200% increase in assistance over the same period in the previous year. We look forward to increasing our impact in 2025.

**Recommendation**

Recommend the adoption of DPA terms for borrowers with incomes below 80% AMI. The 4% DPA will be forgiven in 30 years. The 5% Focused Demographics DPA will be forgiven in 15yrs.



**DATE:** February 7, 2025

**TO:** Housing Stability Council  
Andrea Bell, Executive Director

**FROM:** Magda Bejarano B., Language Services Policy Advisor  
Chelsea Bunch, Director of Equity, Diversity, & Inclusion

**SUBJECT:** Update on OHCS' Language Accessibility Work

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Summary: After receiving dedicated resources in the 2023 Legislative Session to support inclusive communications, OHCS has been diligently working to increase and bolster our language accessibility work. In June 2025, OHCS will have an up-to-date Language Access Plan (LAP) that will reflect the learnings and recommendations from the needs assessment conducted with Portland State University.

This memo and subsequent briefing will provide a high-level overview of the agency's language access work, including the sharing of important highlights.

### **Background**

In the 2023-25 budget cycle the OHCS submitted a \$23.7M policy package, Statewide Training and Technical Assistance Program, targeted to strengthening Oregon's social safety net by providing funds that would build the organizational capacity of our partners in housing, support their ability to move their mission-critical work forward, and ensure the ecosystem of housing providers, including OHCS, are effectively addressing the most pressing housing issues we face with community accessibility at the core. This request for resources also included funds to develop and fund agency-wide support for language access needs, training opportunities, and technical assistance. The Agency received a portion of these funds, \$1.7M, specifically for standing up the Agency's language access program.

At the time of this request, the Agency had a Language Access Plan (LAP), however it was incredibly out of date being from 2015. The Agency did not have a clearly outlined policy or process for programs that outlines when/how to translate content, including which documents were considered vital documents. There was a lack of clarity on what is required and limited resources committed for translation and interpretation.

With the infusion of these important resources from the 2023-25 budget, the Agency's has begun to develop its language services program and is currently implementing funding, inclusive of hiring a dedicated staff tasked with developing and implementing the work. The

Agency began working with Portland State University’s Population Research Center and the Center for Public Services in September 2024 to launch our agencywide language access needs assessment and for development and implementation support for developing our Language Access Plan.

A key part of the assessment and subsequent Language Access Plan will be developing quantitative and qualitative metrics to help evaluate program outcomes over time that will come from focus groups within the needs assessment, and that will articulate the value of ensuring inclusive communications as a part of our regular Agency practice. The assessment will include an evaluation of existing Agency data to identify the frequency with which people with Limited English Proficiency encounter Agency programs, and the points and types of contact the Agency and its staff may have with people with Limited English Proficiency, as well as an analysis of the frequency of contacts, the type of language assistance services needed, and the languages being requested. Lastly, the assessment will include outreach and focus groups with people with Limited English Proficiency to better understand specific needs and how the Agency’s language services program might better reach and serve people with Limited English Proficiency.

The Agency has also brought on additional translation service providers for translations of important documents across all agency programs and has developed a “buyer’s guide” for accessing those services. As we continue to build out our language services program, including providing staff training on the connection between language accessibility and meeting our housing mission, we anticipate a continued increase in the regular use of translation and interpretation services within the agency, ultimately leading to increasing equitable access to information and resources the Agency stewards.





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**DATE:** February 7, 2025

**TO:** Housing Stability Council  
Andrea Bell, Executive Director

**FROM:** Tim Mahern-Macias, Tribal Liaison  
Chelsea Bunch, Director of Equity, Diversity, & Inclusion

**SUBJECT:** 2024 OHCS Government to Government Report

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Summary: In 2024, OHCS continued to deepen and nurture relationships with each of the nine federally recognized Tribes of Oregon. Tribes' commitment to working in partnership with OHCS and ongoing engagement with Tribal leaders has supported the continued success of the By and For Initiative: Native American Tribes of Oregon (BAFI-NATO) program, spurred Tribal homeownership development using the Homeownership Development Incubator Program (HDIP), continued use of resources for affordable rental housing development including resources for Permanent Supportive Housing, and the Tribally-led and co-created Tribal Housing Grant Fund (THGF), which was included as one of the Governor's Office legislative priorities in the 2025 Legislative Session.

This memo and subsequent briefing will provide a high-level overview of the agency's 2024 Government-to-Government report, including the sharing of important highlights. The full report is attached to this memo.

**Background**

Each year, in accordance with Senate Bill (SB) 770 and Oregon Revised Statute (ORS) 182.162 to 182.168, OHCS submits a Government-to-Government report to the Governor's Office and to the Legislative Commission on Indian Services (LCIS). This annual report is designed to share updates from previous plans, provide a description of key agencies services and investments, highlight Tribal engagement activities, and share updated priorities.

# Oregon Housing and Community Services (OHCS) 2024 Government to Government Report



## Summary

In accordance with Senate Bill 770 (SB) and Oregon Revised Statutes (ORS) 182.162 to 182.168, Oregon Housing and Community Services submits the following report to the Governor and the Legislative Commission on Indian Services.

This report includes an overview of the department, an update since the last Government to Government Report was prepared, a description of key agency services, and 2025 priorities for improved engagement of Tribal communities and partnership with Tribal governments.

I look forward to engaging with the Legislative Commission on Indian Services, and Tribal Leadership in 2025, and welcome your thoughts throughout the year.

Sincerely



Andrea Bell, Executive Director



## Oregon Housing and Community Services

Oregon Housing and Community Services is the state's housing finance agency and focuses on housing and community services to allow the agency to serve Oregonians across the housing continuum. This includes preventing homelessness, reducing energy burden, providing housing stability support, innovative affordable housing financing and preservation, reducing the racial wealth gap through homeownership and strengthen build community resiliency before and after an emergency event. The criticality of Oregon's housing crisis requires OHCS to be more than a housing finance agency, but also a model of how government agency sets an inclusive vision supported by a course of action that address some of our states steepest housing issues.

OHCS delivers these programs primarily through grants, contracts and loan agreements with local partners and community-based providers and has limited direct contact with low-income families and individuals that benefit from our programs. OHCS has committed to a long-term community engagement strategy, including tribal engagement. Tribal engagement is a key focus area in OHCS' new Diversity, Equity, and Inclusion Action Plan, where we explicitly seek to co-create with Tribal partners in a way that centers and values their voice, perspectives and participation. OHCS administers resources for the development and reservation of multifamily housing through the Oregon Centralized Application (ORCA). Oregon Administrative Rules Chapter 813, Division 230 and Oregon Revised Statutes 458.505 stipulates that anti-poverty funds, administered by OHCS, shall be distributed to established Community Action Agencies across the state. These funds include rental assistance, homeless, low-income energy assistance, weatherization, Community Services Block Grant, and other funding as it becomes available to OHCS.

OHCS' sources of funds are varied and include federal and state resources which have complex regulatory compliance requirements, which, historically, have been barriers to many communities. Therefore stewardship, compliance monitoring, and asset management are all critical functions played by OHCS staff, in addition to capacity building for those wanting access to said resources. OHCS is governed by the Oregon Housing Stability Council. Established in 1971 by the Oregon Legislature, the Housing Council is charged with meeting the tremendous need for the provision of affordable housing for lower income Oregonians. The Council consists of nine members appointed by the Governor, subject to confirmation by the Senate. Pursuant to ORS 456.555 (5)(a)(b)(c), the Housing Stability Council, with the advice of the Director, sets policy and approves or disapproves rules and standards for programs, and approves or disapproves loans



and grants, and carries out the provisions of ORS456.561 and ORS 456.571.

Housing Stability Council Members:

- Council Chair Claire Hall, Lincoln County Commissioner
- Council member Javier Mena, Affordable Housing Manager at the City of Beaverton
- Council member Sami Jo Difuntorum, Siletz Tribal Housing Executive Director
- Council member Margaret Harris, PM at Holst Architecture
- Council member Mary Ferrell, Maslow Project Executive Director
- Council member Mary Li, Multnomah County
- Council member Erin Meechan, member of Residents Organizing for Change and the Community Alliance of Tenants
- Council member Sharon Nickleberry Rogers, CPA, Financial Analyst – City of Portland
- Council member Kristy Rodriguez, Executive Director of Housing Authority of Malheur and Harney Counties

**Key Contacts**

Below is the contact information for key decision makers within OHCS, including the three program divisions.

Agency Director	Andrea Bell	<a href="mailto:andrea.bell@hcs.oregon.gov">andrea.bell@hcs.oregon.gov</a> 503-428-3734
Agency Deputy Director	Caleb Yant	<a href="mailto:caleb.yant@hcs.oregon.gov">caleb.yant@hcs.oregon.gov</a> 503-986-2056
Affordable Rental Housing Director	Natasha Detweiler	<a href="mailto:natasha.detweiler@hcs.oregon.gov">natasha.detweiler@hcs.oregon.gov</a> 503-508-3824
Homeownership Director	Keeble Giscombe	<a href="mailto:keeble.giscombe@hcs.oregon.gov">keeble.giscombe@hcs.oregon.gov</a> 503-689-2145
Housing Stabilization Director	Liz Weber	<a href="mailto:liz.weber@hcs.oregon.gov">liz.weber@hcs.oregon.gov</a> 503-931-3892
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### Statewide Housing Plan Implementation

In February 2019, the Housing Stability Council adopted the Statewide Housing Plan. The Statewide Housing Plan is a 5-year strategic plan for the agency, with 6 key priorities:

*Equity and Racial Justice Priority* - Advance equity and racial justice by identifying and addressing institutional and systemic barriers that have created and perpetuated patterns of disparity in housing and economic prosperity.

*Homelessness Priority* – Build a coordinated and concerted statewide effort to prevent and end homelessness, with a focus on ending unsheltered homelessness of Oregon’s children and veterans.

*Permanent Supportive Housing Priority* - Invest in permanent supportive housing, a proven strategy to reduce chronic homelessness and reduce barriers to housing stability.

*Affordable Rental Housing Priority* – Work to close the affordable rental housing gap and reduce housing cost burden for low-income Oregonians.

*Rural Priority* – Change the way OHCS does business in small towns and rural communities to be responsive to the unique housing and service needs and unlock opportunities for housing development.

*Homeownership Priority* – Provide more low- and moderate-income Oregonians with the tools to successfully achieve and maintain homeownership, particularly in communities of color.

As of 2024, the SWHP has been completed and a final report with the agency’s progress on the plan can be found [here](#).

### Legislative Highlights

During the 2024 Legislative Session, Oregon Housing & Community Services (OHCS) received over \$212 million to address housing and homelessness needs across the state. These funds build



on the historic \$1.14 billion allocated to the agency during the 2023 Session and will ensure that supports remain available throughout the biennium while also launching new and critical work. In addition to key investments, OHCS also saw the passage of key policy bills that made needed adjustments to current programs to ensure the effective delivery of resources to Oregonians.

- \$65 million to support existing shelter operations and housing-focused services.
- \$34 million in homelessness prevention resources with a 30% set-aside for culturally responsive organizations.
- \$7 million in additional homelessness prevention funds for the Urban League of Portland.
- \$5 million to support the Individual Development Account (IDA) Initiative.
- \$39 million to continue rehousing efforts in communities statewide as part of Oregon’s ongoing Emergency Homelessness Response effort.

## Homeownership Division

### Homeownership Development

The Homeownership Division did not fund any new Tribal projects in 2024. However, Tribal projects funded by OHCS in 2023 made significant progress:

- The Burns Paiute Tribe has provided their first issuance of downpayment assistance (DPA) and is currently working with their second homebuyer to get them ready for purchase and closing. They will fund a total of 4 homebuyers purchasing homes recently constructed on Burns Paiute land.
- Confederated Tribes of Coos, Lower Umpqua & Siuslaw has spent \$75,000 on needed for home repairs for tribal members.
- Coquille Indian Housing Authority launched a First Time Homebuyer Assistance Program in August 2024 and will support three tribal households with down payment assistance.
- Confederated Tribes of Grand Ronde will build six homes within a larger housing development, called tipsu-ili’i (grass land). This is part of phase 1 in which they will build a total of 20 new single-family homes for tribal members within a larger 52-unit project. This project is now complete. Three homes have sold and the other three homes have buyers who are waiting to close escrow.
- Nixyáawii Community Financial Services (NFCS) & Confederated Tribes of the Umatilla Indian



Reservation is about 20% through building 21 two- and three-bedroom homes. Their staff worked with three potential homebuyers who received pre-approvals for Section 184 mortgages. Next quarter they plan to finalize the selection of the homebuyers and floor plans and start the permitting process.

## Affordable Rental Housing Division

### Oregon Centralized Application

The Oregon Centralized Application (ORCA) offers loans, grants, and tax credits to support the development affordable housing throughout Oregon. It is the process through which sponsors and developers who want to build affordable housing in Oregon must go through to receive funding from Oregon Housing and Community Services' (OHCS) Affordable Rental Housing Division (ARH) programs. In January 2024, OHCS staff attended the Tribal Housing Workgroup to solicit input about the proposed “set asides” for Tribes in the ORCA and Predevelopment program design.

ARH launched the new ORCA in the spring of 2024. Prior to full launch, a “soft launch” with a set of projects that had previously applied for funding but not been awarded through the prior Notice of Funding Availability (NOFA) competitive process. This set of projects provided OHCS the opportunity for testing the new ORCA system. The soft launch involved five projects, including a tribal rental housing development with Confederated Tribes of Umatilla Indians.

The ORCA includes \$30 million of state resources – General Housing Account (GHAP) and Housing Development Grant Program (HDGP) – as dedicated capital for Tribal Nations.

A newly established team of Technical Advisors joined the April Tribal Housing Workgroup to establish a new point of contact at OHCS. Technical Advisors act as liaisons with affordable housing developers to support:

- Navigation of the new Oregon Centralized Application (ORCA) process;
- Accessing OHCS ARH Resources including Predevelopment Loans, Capacity Building grants, and other tools, and;
- Building relationships with OHCS that support current ARH projects and future pipeline.





Technical Advisors reached out to schedule meetings with each tribe. In September 2024, the Technical Advisors met with Confederated Tribes of Umatilla Indians to discuss their affordable rental housing project that became part of the soft launch.

### **General Housing Account Program (GHAP) - Capacity Building**

In 2023, GHAP Capacity Building funds were paired with HOME American Rescue Plan (HOME ARP) development funds in the Homeless Housing Response and Capacity Strengthening NOFA. In February 2024, OHCS awarded funding to the Burns Paiute Tribe to increase their capacity to address housing needs in their community.

In March 2024, GHAP Capacity Building staff attended the Tribal Housing Workgroup to get feedback about including capacity building funds within the ORCA. When the ORCA launched in the spring, approximately \$1.3 million of GHAP Capacity Building funding was allocated for tribal nations through it. Staff will continue engagement with the Tribes and the Tribal Housing Workgroup to facilitate use of the ORCA Capacity Building Grant funds and ensure it is meeting the needs of tribes.

### **LOW INCOME HOUSING TAX CREDIT PROGRAM**

The Low-Income Housing Tax Credit (LIHTC) Program provides federal income tax credits to developers who construct, rehabilitate, or acquire and rehabilitate qualified low-income rental housing. These development projects encompass multifamily rental housing units. Eligible applicants include both for-profit and nonprofit sponsors.

The LIHTC program requires each state housing finance agency to have a Qualified Allocation Plan (QAP) to establish the eligibility criteria and process for awarding 4% and 9% federal tax credits to housing properties. Under the QAP, Native Nations have access to a 10% Tribal Lands Set-Aside. This means 10% of the total federal 9% LIHTC allocation for Oregon is held for projects sponsored by tribal governments, tribally designated housing entities or tribal corporate entities on tribal trust land. In April 2024, the Housing Stability Council approved \$1 million in LIHTC and over \$3 million in federal HOME funding to the Klamath Tribal Housing Department for the construction of 30 new rental homes. ARH is engaging in discussions with the Klamath Tribes about the proposed housing project.



## Permanent Supportive Housing (PSH)

The objective of the PSH Program is to expand the state's supply of affordable housing designed to serve households experiencing chronic homelessness. Annually, OHCS, through a partnership with national nonprofit Corporation for Supportive Housing (CSH), reviews applications and selects teams to participate in the Oregon Supportive Housing Institute (SHI). In the spring of 2024, Klamath Tribal Housing was selected to join the Supportive Housing Institute, however, after staffing changes, Klamath Tribal Housing was not able to participate in the SHI cohort.

In August 2024, Warm Springs Housing Authority celebrated the grand opening of 12 new Permanent Supportive Housing homes. Warm Springs Housing Authority and Warm Springs Behavioral Health Center were members of the 2020 PSH Institute Cohort, and they received technical assistance and over \$4 million to construct these new homes, along with over \$200,000 annually for rent assistance and services funding to support the tenants living in them.



*Figure 1 Warm Springs Permanent Supportive Housing Units*

## Additional topics discussed with the Tribal Housing Workgroup

House Bill 2071, which passed in 2023, directed OHCS to create a funding source to complement the Contract Preservation process to maintain and preserve the existing Publicly Supported Housing (PuSH)



stock. The new resource is the PuSH Seller’s Tax Credit, often called the “preservation tax credit” by advocates during the legislative session. OHCS staff attended the June 2024 Tribal Housing Workgroup to provide an overview of the framework for this resource.

OHCS consulted with tribes at the June 2024 Tribal Housing Workgroup prior to submitting a grant application to HUD for their Preservation and Reinvestment Initiative for Community Enhancement (PRICE) offering. OHCS submitted the grant application, requesting \$25 million to invest in the Manufactured Home Repair and Replacement Program and Manufactured Dwelling Park Preservation Program. OHCS is still waiting to hear from HUD if the grant application was successful.

### Housing Stabilization Division

#### **BY AND FOR INITIATIVE: NATIVE AMERICAN TRIBES OF OREGON (BAFI-NATO) Wave II**

Data demonstrates that Tribal Members within the state are disparately overrepresented in homelessness by more than 4x their share of the state’s population. We also know that people who identify as American Indian or Alaska Native are more likely to experience unsheltered homelessness. Furthermore, we know that available Point-in-Time count and Census data do not fully capture the current extent of housing instability in Tribal communities. In the 21-23 biennium, the BAFI-NATO program was established, with a total allocation of \$9M, to create or support local existing programs designed to prevent and reduce homelessness in Tribal communities.

Programs like BAFI-NATO are effective and critical in helping to prevent homelessness. Most Oregon Tribes have either created new or expanded their existing rent and mortgage assistance programs, to help keep Tribal families stably and safely housed and avoid unsheltered homelessness or overcrowded housing situations. Additionally, long waitlists for placement into affordable housing/low-income housing means that prevention measures are critical in keeping families together and safe. With this in mind, BAFI-NATO homelessness prevention eligible expenses were expanded to include urgent minor home repairs that, if left unattended to, would put a household at imminent risk of homelessness.

In the 23-25 biennium, OHCS continued building on the relationships established with Tribal partners, directly allocating a total of \$10M to the Nine Federally Recognized Tribes of Oregon. This allocation (BAFI-NATO Wave II) is a combination of the \$5M allocated for Tribes in HB5019 (By way of Executive Order 23-02 declaring a homelessness state of emergency) and the \$5M allocated for Tribes in SB5511 as part of OHCS’ approved biennial budget.



As of November 2024, BAFI-NATO Waves I & II programs have led to:

- 1,340 individuals (de-duplicated) are receiving or have received services including:
  - 781 people are currently enrolled in a housing or homeless prevention program
  - 212 people received one-time services and,
  - 347 enrolled people have exited either a housing or homeless prevention program:
    - 334 received services preventing homelessness (96%)
    - 10 people exited a housing services program to another destination, which could include moving into homelessness, into a state facility, or an unknown outcome
    - 2 people exited homeless services to a temporary location, like shelter or transitional housing, or hotel/motel without voucher.
    - 1 person exited homelessness to permanent housing

*Note: Program enrollment numbers are based only on clients enrolled in specific programs. Outcomes are based on program enrollments. Clients served (1,340) is a **combination** of program enrollments and one-time services. Clients can receive a service without being enrolled in a program.*

*An “exit” refers to a client’s active program record in the Homeless Management Information System (HMIS) being closed out, either due to gaining stable housing or choosing to opt out of services. This is not always a permanent distinction, as a client’s record in HMIS can be reopened if services are needed again in the future.*

- \$1,184,430.50 in Client Rental/Mortgage Assistance
- \$265,629.59 in Client Utility Assistance
- \$923,644.42 in Homelessness Prevention Activities, including critical home repairs, rental arrear payments, and case management support
- \$65,241.81 in Shelter Costs and Hotel/Motel Vouchers

Additionally, nearly \$2.8M has been utilized to support the development of two Emergency Shelter sites and three Transitional Housing sites on Tribal Lands.

Regular engagements between OHCS’ Tribal Liaison and Program/Policy Staff and the Tribal partner network continue at a regular cadence, such as the monthly Tribal Housing Workgroup



and the biweekly BAFI-NATO Office Hours. These conversations continue to reframe and reshape how OHCS conducts business on a government-to-government basis, recognizing that BAFI-NATO is only a starting point in an ongoing relationship with the Sovereign Tribal Nations of Oregon.

There is continued need for more consolidated, flexible, and predictable funding dedicated for the Nine Tribes across the agency, not only in our Housing Stabilization division and Homeless Services section. With this in mind, we have collaborated with Tribal partners over the past year to develop a recommendation for a state-funded Tribal Housing Grant Fund beginning in the 25-27 biennium that would encompass direct allocations from Housing Stabilization, Affordable Rental Housing, and Homeownership divisions.

## **PROJECT TURNKEY 2.0**

In the 2022 Legislative Short session, additional funds were allocated to fund Project Turnkey 2.0 (PTK), an investment geared toward acquiring former hotels, motels, warehouses, etc., and converting them into emergency shelters and/or transitional housing. This program is administered by the Oregon Community Foundation (OCF), which in the summer of 2022 solicited OHCS assistance to engage with Tribes and solicit applications from them. OHCS facilitated a series of meetings, and two Tribal applications were approved to move forward with this funding in 2023. These awards totaled \$4.3 million and resulted in nearly 30 additional shelter and transitional housing units coming online in 2023 and 2024 for the Klamath Tribes (Supportive Housing for Tribal Elders, former site of Melita's Cafe) and the Confederated Tribes of the Grand Ronde Community of Oregon (Liberty Street Complex, Community Transitions Program). These PTK funds can continue to be expended through June 30, 2025. Additionally, these two Tribes can continue to support PTK site operations using other OHCS funding sources such as BAFI-NATO.





*Figure 2 Klamath Tribes new Permanent Supportive Housing*



*Figure 3 Inside the Klamath Tribes PSH*

## **LOW-INCOME ENERGY BILL PAYMENT ASSISTANCE PROGRAM (LIHEAP)**

OHCS administers funds from the U.S. Department of Health and Human Services (HHS) through the Low-Income Home Energy Assistance Program (LIHEAP) to help low-income households with their home energy expenses. These funds are used for bill payment assistance, energy education, case management, and home weatherization services for households who meet program eligibility.

LIHEAP funds are generally allocated by OHCS to Community Action Agencies to respond to community need. However, HHS does directly contract with Tribal governments and with OHCS' support, 6 of the federally recognized tribes of Oregon administer their own LIHEAP funding. The Klamath Tribes, Cow Creek Band of Umpqua Tribe of Indians, Confederated Tribes of Grand Ronde, Confederated Tribes of Warm Springs, Confederated Tribes of Siletz, and the Confederated Tribes of Coos, Lower Umpqua, and Siuslaw Indians have administered individual LIHEAP programs to serve their members. OHCS makes the OPUS Data Collection System, including an energy program-specific module, available for Tribal use to track financial and program reporting and provides training on the web-based software.



## TRAININGS

In 2024 through the partnership OHCS had with ICF for EO 23-02, ICF led a technical assistance webinar series with a session dedicated to partnering with Indigenous Peoples, Native Hawaiians, Pacific Islanders, Tribal Nations, and Tribal Entities in early 2024. These webinars were a part of OHCS's technical assistance provided to maintain the work done under EO 23-02.

### Development of OHCS' Racial Equity Analysis Tool (REAT)

Beginning in September 2021 and continuing through to today, OHCS staff, in partnership and collaboration with one of our equity committees, the Equity Lab, began to develop our Racial Equity Analysis Tool (REAT). The REAT is designed to integrate explicit and intentional consideration of racial equity in our decision-making, including policies, programs, and budgets – it is both a product and a process. OHCS believes the use of the REAT will help us develop strategies and actions that reduce racial inequities and improve success for Tribal communities, Black, Indigenous, Latino/a/x, Asian-American and Pacific Islander (BIPOC) communities in Oregon. As we continue to engage with Tribal partners and build new programs that impact Tribes, we anticipate utilizing the REAT to ensure equitable program building and policy making. OHCS has hired two staff to help deploy the tool, with plans in the new year to hire two additional staff.

### SB 770 Tribal Cluster Participation

#### Tribal Liaison Staff Engagement with Tribes

During 2024 the OHCS tribal liaison attended and presented at meetings of the Legislative Commission on Indian Services (LCIS). This includes the Health and Human Services cluster meetings, economic development cluster meetings, and an OHCS lead tribal housing work group (THWG).

The Clusters are helpful networks for learning about tribal priorities and initiatives, as well as distributing information and getting feedback about OHCS funding opportunities. During 2023 information was distributed about legislative allocations related to new programs and initiatives, such as new energy assistance programs, capacity building opportunities and the revamping of the NOFA process for Affordable Rental Housing Division. Through these clusters, OHCS has been able to work collaboratively with other agencies on tribal issues, including OHA, DELC, Business Oregon and others.



Tribally Designated Housing Entities (TDHE's) do not attend Cluster meetings, but OHCS staff provides regular communication to TDHE's, and other tribal staff. In addition, OHCS is a supporter of the Northwest Indian Housing Association (NWIHA) and attends regular meetings to understand tribal housing issues and opportunities. OHCS also attends National American Indian Housing Council conferences to learn about new initiatives, policies and practices around tribal housing.

In 2024, OHCS continued to facilitate the tribal housing work group. This group's purpose is to identify the housing needs of the tribes, how to lower barriers to housing (on and off reservation) and potentially recommend equitable legislation to LCIS. It also serves as the first touch point for consultation with tribes on new programs. The working group is made up of tribal leaders, housing directors, health and human services directors, OHCS staff, and includes Housing Stability Council Member and Siletz Tribal Housing Executive Director, Sami Jo Difuntorum.

In addition to the input of the tribal leaders, the housing work group provides an opportunity for OHCS program staff to regularly engage with tribal leaders about new OHCS programs or changes to funding. This includes presentations about QAP, changes to the Oregon Affordable Housing Tax Credit (OAHTC) and the Supportive Housing Institute.

### **New Funding Model Recommendation**

One result of the THWG and the Government-to-Government discussions through summits and visits was the development of a new funding model recommendation for the 9 federally recognized tribes of Oregon. This model, called the Tribal Housing Grant Fund, was a result of a year-long effort between the tribes and agency staff, and is prioritized in the Governor's Recommended Budget. Governor Kotek is committed to strengthening partnership with Tribal Nations to address housing and homelessness. Her administration has made targeted investments in Tribal housing and homelessness programs to support culturally specific solutions that honor Tribal sovereignty and community needs. These investments aim to increase the availability of affordable housing, expand shelter capacity, and provide wraparound services that address the root causes of homelessness in Tribal communities. By centering Tribal voices in policy decisions and funding allocations, the Tribal Housing Grant Fund program development will be vital to ensuring every Tribal member has access to safe, stable, and dignified housing. The Tribal Housing Grant Fund represents a first in the nation approach to how a state funds





tribal housing initiatives.

### Tribal Engagement Goals for 2025

OHCS has big goals for 2025 and tribal engagement, which include continuing to grow our partnership and engagement with the 9 Federally Recognized Tribes of Oregon. With the release of the Governor's Recommended Budget and the inclusion of a Tribal Housing Grant Fund, if passed, we anticipate one of the deepest and most meaningful consultations and engagements with the tribes in our agency history. We will continue to work closely with our sovereign partners to find way to address their complex housing needs.

For 2025, we expect to continue to increase tribal visits, as well as attending more tribal conferences such as NAIHC and NWIHA.

The agency will continue to be more responsive to tribal needs, honor tribal sovereignty, self-determination and offer its support where needed. We look forward to a fruitful 2025.

