

NEWBERG AFFORDABLE HOUSING COMMISSION AGENDA

Tuesday, April 25, 2023, 4:00 PM

Teleconference meeting

<https://us06web.zoom.us/j/87074841905>

Or Telephone: Dial: +1 360 209 5623 US or +1 564 217 2000 US

Webinar ID: 870 7484 1905

- I. CALL MEETING TO ORDER**
- II. ROLL CALL**
- III. APPROVAL OF MINUTES – January 24, 2023**
- IV. PUBLIC COMMENTS**
- V. 2021-2022 NOTICE OF FUNDING AVAILABILITY SUBMITTED APPLICATIONS REVIEW – AFFORDABLE HOUSING TRUST FUND**
- VI. HABITAT CLOSEOUT REPORT**
- VII. UPDATE ON THE CONTRUCTION EXCISE TAX (CET) FUND**
- VIII. UPDATE COMMUNITY DEVELOPMENT BLOCK GRANT**
- IX. UPDATE HOUSING PRODUCTION STRATEGY**
- X. UPDATE ON MUTLI-FAMILY CODE AUDIT**
- XI. CITY COUNCIL GOALS**
- XII. NEXT MEETING – July 25, 2023**
- XIII. ADJOURNMENT**

ACCOMMODATION OF PHYSICAL IMPAIRMENTS: In order to accommodate persons with physical impairments, please notify the Community Development Department Office Assistant II of any special physical or language accommodations you may need as far in advance of the meeting as possible as and no later than 48 business hours prior to the meeting. To request these arrangements, please contact the Office Assistant II at (503) 537-1240. For TTY services please dial 711.



AFFORDABLE HOUSING MEETING

AFFORDABLE HOUSING COMMISSION MINUTES

January 24, 2023 4:00pm
414 E First St,
City Hall Permit Center
Newberg Teleconference Meeting

(This is for historical purposes as meetings are permanent retention documents and this will mark this period in our collective history)

I. CALL MEETING TO ORDER

Chair Larry Hampton called the meeting to order at 4:03 p.m.

II. ROLL CALL

Members Present: Megan Norton
Larry Hampton (Chair)
Casey Banks
Leslie Murray

Members Absent: Melisa Dailey, Matthew Stidman

Staff Present: Doug Rux, Community Development Director

III. APPROVAL OF MINUTES:

Member Banks pointed out that the minutes did not have her as present when she was.

MOTION: Member Casey Banks Motioned to approve the minutes with changes / Member Megan Norton Seconded to approve the meeting minutes with changes for the meeting of October 25, 2022.

Motion carried: 4 Yes No 2 Absent Abstain

IV. ELECTION OF CHAIR AND VICE CHAIR

MOTION: Member Casey Banks Motioned / Member Leslie Murray Seconded to elect Larry Hampton as Chair

Motion carried: 4 Yes No 2 Absent Abstain

MOTION: Member Megan Norton Motioned / Member Leslie Murray Seconded to elect Casey Banks as Vice Chair

Motion carried: 4 Yes No 2 Absent Abstain

V. PUBLIC COMMENTS: None

VI. 2022-2023 NOTICE OF FUNDING AVAILABILITY SUBMITTED APPLICATIONS REVIEW – AFFORDABLE HOUSING TRUST FUND

Did not review due to not having all the members present. Tabled until next meeting or possibly at a earlier date of February 28, 2023, at 4pm. The Members present were available for the February 28, 2023 date, staff will reach out to the absent members to see if they will be available for that date.



AFFORDABLE HOUSING MEETING

VII. UPDATE ON THE CONTRUCTION EXCISE TAX (CET) FUND

CDD Rux updated the Commission as to the status of the CET Funds.

VIII. UPDATE COMMUNITY DEVELOPMENT BLOCK GRANT

CDD Rux Informed the Commission of the status of the Block Grant.

IX. UPDATE HOUSING PRODUCTION STRATEGY

CDD Rux reviewed the Housing Production Strategy.

X. UPDATE ON MUTLI-FAMILY CODE AUDIT

CDD Rux reviewed the Multi-Family Code audit proposed changes that was presented by 3J at the Virtual Open House.

Vice Chair Banks asked for clarification about the parking against what we currently require. CDD Rux answered her question.

CDD Rux asked the Commission members If they had any questions or concerns before they made a motion to recommend the changes to the Planning Commission and City Council.

MOTION: Member Casey Banks Motioned / Member Megan Norton Seconded to recommend the changes to the Multi-Family Code to the Planning Commission and City Council.

Motion carried: 4 Yes No 2 Absent Abstain

Chair Hampton asked what would happen If this does not get approved by either the Planning Commission and City Council. CCD Rux explained the State process and what could happen if not approved.

Chair Hampton asked why the Housing Needs Analysis has not been adopted yet. CCD Rux explained why it was delayed and the changes for the requirements from the State.

XI. NEXT MEETING: April 25, 2023, with a possible extra meeting on February 28th and HPS meeting on February 14th.

XII. ADJOURNMENT: 4:59 p.m.

Approved by the Newberg Affordable Housing Commission this _____, 2023.

Affordable Housing Commission Chair

Fé Bates, Recording Secretary

MEMORANDUM

TO: Affordable Housing Commission
FROM: Doug Rux, Community Development Director
SUBJECT: Agenda Items
DATE: April 25, 2023

Affordable Housing Trust Fund

Two applications were received from the Notice of Funding Availability that ended on October 30, 2022. Review of the applications was postponed in January 2023 due to lack of a quorum and re-scheduled to April 25th. A memorandum and the applications are attached.

Staff recommends the Affordable Housing Commission consider the applications and forward a recommendation to fund or not fund to the City Council.

Habitat Closeout Report

Newberg Area Habitat for Humanity was awarded a grant from the Affordable Housing Trust Fund in 2021 in the amount of \$5,000.00 for their A Brush with Kindness Program. Attached are the quarterly reports and the final report submitted per the grant agreement. Habitat returned \$2,507.60 of unexpended funds per the grant agreement. A closeout report will be presented to the City Council on June 5, 2023.

Construction Excise Tax

The City Council approved the Notice of Funding Availability (NOFA) documents on December 5, 2022. The new City Council has asked for a briefing on the Construction Excise Tax (CET) at their February 6, 2023, meeting. At this time the solicitation for the NOFA is on hold until further direction is provided. City Council continues discussions if the CET program will be terminated or not.

Community Development Block Grant

The Community Development Block Grant (CDBG) project continues to move forward. To date City staff have signed off on seventeen projects for manufactured homes in manufactured home parks. The CDBG project needs to be completed and closed out by December 20, 2023.

Housing Production Strategy

The Citizens Advisory Committee meet for their fifth meeting on February 14, 2023, to review

the final draft and developed a recommendation to the City Council to accept the document. The Planning Commission reviewed the Housing Production Strategy (HPS) on April 13, 2023 and forwarded a recommendation to City Council to accept the document. The City Council will be reviewing the final version of the HPS on May 1, 2023. This project per the grant award is to be completed by the end of May 2023.

Multi-family Code Audit

The Planning Commission reviewed the proposed Comprehensive Plan and Development Code changes on March 9, 2023. The City Council held their first reading on the proposed ordinance on April 3, 2023. The second reading of the ordinance is scheduled for April 17, 2023. This project per the grant award is to be completed by the end of May 2023.

City Council Goals

City Council adopted their Goals on April 3, 2023. A copy of the Goals are attached.

- Attachments:
1. Affordable Housing Trust Fund Memorandum & Applications
 2. Habitat Reports
 3. City Council Goals

MEMORANDUM

TO: Affordable Housing Commission
FROM: Doug Rux, Community Development Director
SUBJECT: 21-22 Affordable Housing Trust Fund Submitted Applications Review
DATE: April 25, 2023

2021-2022 Affordable Housing Trust Fund Submitted Applications Review

Background:

The Newberg Affordable Housing Trust Fund (NAHTF) is a financial resource intended to support the development, preservation, and rehabilitation of affordable housing that is affordable to the citizens of Newberg. The primary purpose of the NAHTF is to encourage the development, preservation, and rehabilitation of housing for homeownership or rent, at a cost that will enable very low, low-and-moderate income families to afford quality housing while paying no more than thirty percent of gross household income on housing. To promote the rehabilitation, preservation and production of quality, well-designed rental and ownership housing, the NAHTF will award funds to community development partners that are furthering the NAHTF mission. It is expected that the local contributions made through Newberg's Affordable Housing Trust Fund will maximize the leveraging of state and federal funds, as well as encourage private sector investment in affordable housing.

The City of Newberg defines affordable housing as residential housing primarily for households or persons earning less than 80% of the Median Family Income (MFI) and where housing and/or rental costs do not constitute more than 30% of a household's income. For 2022, the Median Family Income (for a family of 4) in the City of Newberg is \$106,500.

Available 21-22 Funding:

- **Competitive Loan Program:** At least \$21,537 is available for this program. This program provides loans for projects that create, acquire, or retain affordable housing in the city.
- **Rehabilitation Loan Program:** Up to \$10,768 is available for this program. This program provides loans to landlords so they can rehabilitate dwellings and make them safe and decent for rental to low or very low income families. Loans are available in amounts ranging between \$2,000 and \$5,000, and may be increased up to \$10,768 if recommended by the Newberg Affordable Housing Commission (NAHC) and approved by the City Council. The standard loan term is five years. The standard interest rate is 2% below the prime rate. Applicants seeking funding assistance must be willing to enter into

a contractual agreement with the city to ensure the future affordability of the project units for a specific period of time. Applications will be accepted at any time during the fiscal year.

- **Time Sensitive Loan Program:** Up to \$10,768 is available for this program. This program offers loans for projects that create, acquire, or retain affordable housing in the community that have particular needs that are opportunity driven and time sensitive. The standard loan term is two years. The standard interest rate is 2% below the prime rate. Security shall be demonstrated based upon 80% loan to value ratio based on the most current County Assessor records. These funds are available on a first come/first served basis, subject to approval.
- **The Time Sensitive Grant Program:** Up to \$17,947.75 is available for this program. This program offers grants for projects that create, acquire, or retain affordable housing in the community that have particular needs that are opportunity driven and time sensitive. These funds are available on a first come/first served basis, subject to approval.

Submitted Applications:

Notice went out about the 2021-2022 Affordable Housing Trust Fund Availability in September 2022. The application period closed on October 30, 2022 and two applications were submitted.

1. Project: Peace Trail Village
Applicant: North Valley Friends Church
Funding Request: \$10,000 – \$50,000
Form of Funding Requested: Time Sensitive Grant
Project Description: A cottage cluster of 8 dwelling units intended to be used as transitional housing with wrap-around services provided to the residents.
Supplemental material per AHC request.
2. Project: Meridian Duplex
Applicant: Scott and Melissa Bontrager
Funding Request: \$10,000
Form of Funding Requested: Time Sensitive Grant
Project Description: Driveway replacement for an existing duplex.

Review and Discussion:

City staff have outlined a few questions that the Affordable Housing Commission will need to discuss further about the submitted applications before making a recommendation to City Council.

1. Do both submitted applications meet the minimum threshold criteria (Attachment A) and qualify for the Affordable Housing Trust Fund?
2. Both submitted applications have provided information and addressed the relevant scored

application criteria (Attachment A). If an application meets minimum threshold criteria and qualifies, what is the collective score? Please discuss as a commission together.

3. Both submitted applications are seeking funding from the Time Sensitive Grant program. This fund has \$17,947 available. If the Commission finds that both applications qualify, this will not be enough to cover both submitted application's minimum requested amounts. How does the Affordable Housing Commission plan to address this?

Recommendation and Motion:

The Affordable Housing Commission will need to make a recommendation to City Council on how the funds will be allocated. The Commission will need to make a motion and vote on the proposed recommendation.

The approved recommendation will then go before City Council for a final decision.

- Attachments:
1. NOFA Application Packet
 2. Peace Trail Village with Supplemental
 3. Meridian Duplex

Newberg Affordable Housing Trust Fund Funding Request Application

FY 2021-22 Competitive Awards Loan Program

NOTE: The first round of applications are due September 30, 2022 at 4:30 p.m.

Applications are to be submitted to Mary Heberling-Creighton, Housing Planner by email at mary.heberlingcreighton@newbergoregon.gov or by postal mail via City of Newberg, PO Box 970, Newberg, Oregon, 97132 or by hand delivery to City Hall, 414 E First Street.

CONTACT INFORMATION:

Project Name:	
Organization Name:	<input type="checkbox"/> For-profit <input type="checkbox"/> Non-profit
Contact Name/Title:	
Mailing Address:	State/Zip:
Phone:	Email:

PROJECT INFORMATION:

Total project cost: _____
Requested amount of funding: _____ <i>Please specify the amount of loans being requested</i>
Amount and description of matching funds being contributed to the project:

Project Partners and their Contributions to the Project:

Estimated project beginning date:	Completion date:
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COMMUNITY DEVELOPMENT
PLANNING DIVISION
(503) 537-1240
planning@newbergoregon.gov

Please see next page

Please briefly describe the affordable housing problem this project is trying to solve and how it helps in solving that challenge:

Please attach additional information that describes how this project will address the Competitive Awards Selection Criteria described in “Attachment A” of this form, including additional documentation/evidence as needed.

Information that addresses Competitive Selection Criteria, attached (please select)

Briefly describe what is attached:

ATTACHMENT A
Newberg Affordable Housing Trust Fund
FY 2021-22 Competitive Awards Program Selection Criteria

Minimum Threshold Criteria	Potential Points
1. The project is considered an eligible use or activity under Section 3, and benefits households earning less than 80% of the median family income (threshold verification)*.	NA
2. If the project is related to the provision of technical assistance to affordable housing providers, the use of Newberg Affordable Housing Trust Funds functions to increase the capacity of the organization to specifically address the mission of the NAHTF (threshold verification).	NA
3. The project is ready for implementation.	NA
4. If the project includes the acquisition of property, the identified property is currently available for acquisition and the applicant has secured either a purchase option or letter of interest from the seller. If the applicant is also applying for federal funding (i.e. Community Development Block Grants or HOME) they should carefully review procurement requirements and limitations before obtaining a purchase option.	NA
5. That relocation of existing residents will be minimized, and when necessary, the applicant has included accurate relocation assistance costs as part of the project pro forma.	NA
6. The proposal demonstrates that the Newberg Affordable Housing Trust Funds are the most appropriate funding source for the project.	NA
Scored Application Criteria	
7. The project provides new affordable housing, or new affordability, through retention or rehabilitation of existing housing, within the city.	Up to 10 points
8. The project retains the affordable housing units as affordable. The longer period of time the units remain affordable, the higher ranking the project shall be given.	Up to 15 points
9. The project provides deeply affordable housing for households earning less than 30% of the median family income.	Up to 5 points
10. The project addresses energy conservation through the integration of green building technologies in new construction, or achieves greater energy efficiency and cost savings to tenants through rehabilitation of existing housing.	Up to 5 points
11. The project maximizes partnerships in the community (volunteers, in-kind contributions, cash contributions, multiple organization involved, etc.) and demonstrates alliance building that directly benefits community members in need, such as helping build household wealth.	Up to 5 points
12. The project utilizes already existing resources in effective and innovative ways. The project shall not duplicate services provided by another organization.	Up to 10 points
13. The agency submitting the proposal has the capacity to carry out the project and has had demonstrated successes completing projects of similar scope. Higher points to projects that demonstrate engagement and contracting with D/M/W/ESB/SDVBE businesses in the last 10+ years.	Up to 10 points
14. The budget and timeline are thorough and realistic (evidence of construction and/ or service costs required with application).	Up to 10 points
Total Potential Points	70

***FOR 2022, the Median Family Income for the City of Newberg was \$106,500.**

DEFINITIONS:

“D/M/W/ESB/SDVBE” means a business that is Disadvantaged, Minority-Owned, Women-Owned, Emerging Small Businesses, and/or Service Disabled Veterans Business Enterprises.

“Gross Income” (GI) is income before taxes for all members of one family in the previous twelve months. Income can be derived from salaries, investments, self-employment, farming, and other sources. Assets such as a house or a farm are not income. For people who have wages, gross income means the figure that they would have received in their paychecks if there were no taxes. Gross income before taxes when applied to farm income means the figure that results when farm expenses are subtracted from farm sales. Gross income also includes unemployment and disability compensation, worker's compensation and severance pay; and welfare assistance payments.

“Family” means all persons living in the same household who are related by birth, marriage or adoption.

“Median Family Income” (MFI) includes the income of the householder and all other individuals 15 years old and over in the household, whether they are related to the householder or not. Because many households consist of only one person, average household income is usually less than average family income. Although the household income statistics cover the past 12 months, the characteristics of individuals and the composition of households refer to the time of application. Thus, the income of the household does not include amounts received by individuals who were members of the household during all or part of the past 12 months if these individuals no longer resided in the household at the time of application. Similarly, income amounts reported by individuals who did not reside in the household during the past 12 months but who were members of the household at the time of application are included. However, the composition of most households was the same during the past 12 months as at the time of application, as defined by the U.S. Census.

Newberg Affordable Housing Trust Fund Funding Request Application

FY 2021-22 Competitive Awards Loan Program

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CONTACT INFORMATION:

Project Name:	
Organization Name:	<input type="checkbox"/> For-profit <input type="checkbox"/> Non-profit
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3. The project is ready for implementation.	NA
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5. That relocation of existing residents will be minimized, and when necessary, the applicant has included accurate relocation assistance costs as part of the project pro forma.	NA
6. The proposal demonstrates that the Newberg Affordable Housing Trust Funds are the most appropriate funding source for the project.	NA
Scored Application Criteria	
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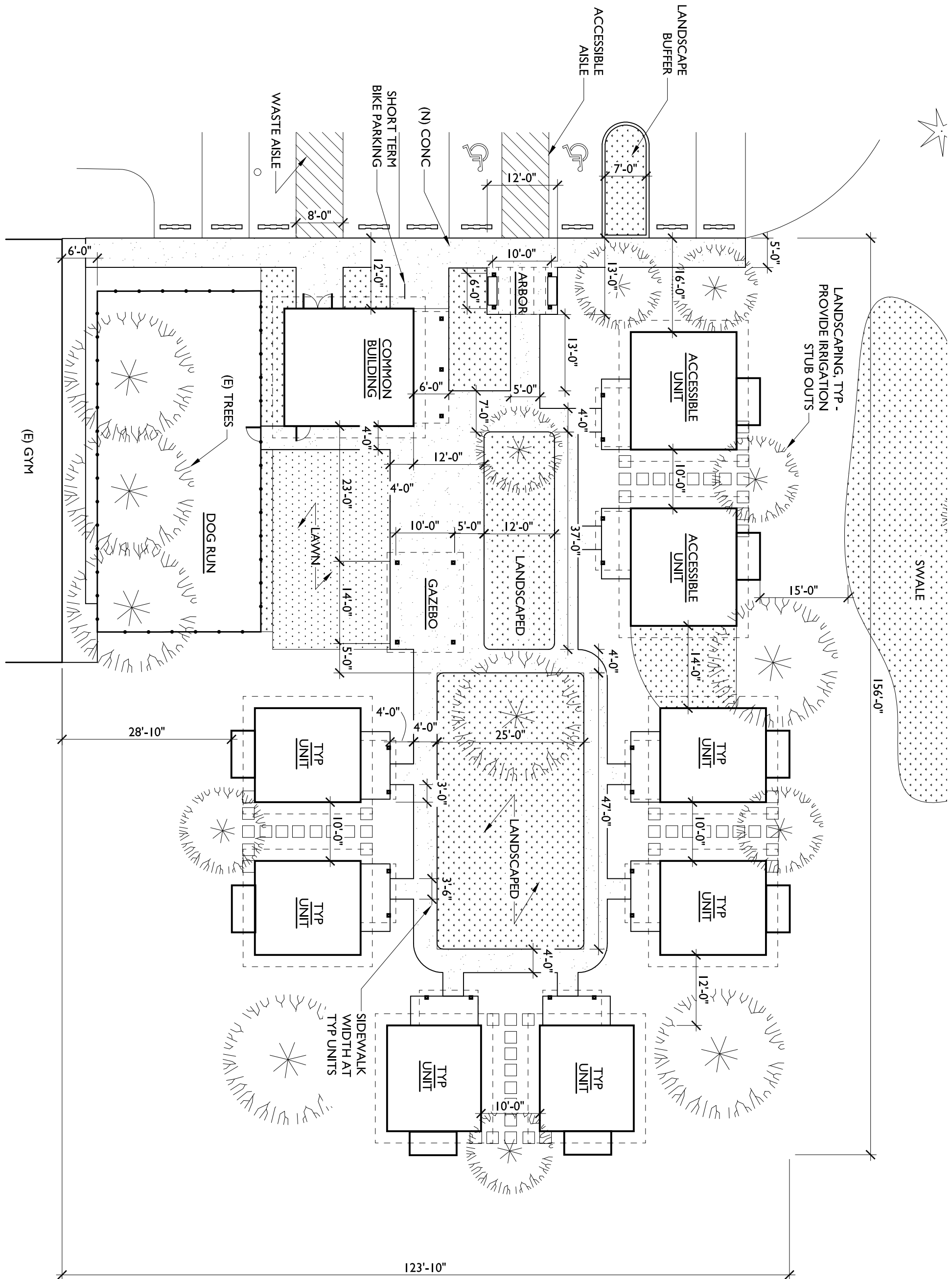
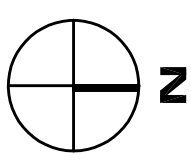
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Addendum to North Valley Friends Grant Application for Affordable Housing Trust Fund

1. NVFC is seeking a grant out of the Affordable Housing Trust Fund. We seek anywhere from 10K-50K as our expenses will be near 1m for the Peace Trail Village. I am seeking grants wherever I can find them to fund the development of the project. Any bit helps. So far we have received ARPA funds, 10K from Austin Foundation, 10K from Northside community church and have 50K from our tithes and offerings from the church.
2. Attachment A Criteria:
 1. We seek to serve individuals and/or small families that are looking for transitional housing to assist the process into procuring long term housing. We will have a utility fee of \$10/week and program fee based on a sliding scale. So if someone is working full time at minimum wage (\$13.50) then their income would be 28K. For someone just starting in the program their program fee will be low (10%) and will increase to the maximum as they prepare to transition into permanent housing (30%).
 2. Part of our partnership and wrap around care will give technical assistance to affordable housing providers. The caseworker will assist with a section 8 housing application, YCAP application or other services needed to procure permanent housing.
 3. Our project is in process. We are finishing up our land use application to be submitted to the city by the end of October. Once we are approved we will begin infrastructure work/building work.
 4. The church already owns the property free and clear where we plan to build Peace Trail Village.
 5. We do not have existing residents currently.
 6. As we are attempting to serve local residents with our project we believe this fits within the scope of NAHT criteria.
 7. With Peace Trail Village we will put 8 new transitional housing units into the city to serve local residents.
 8. By asking folks to pay on a sliding scale basis we are keeping this housing affordable and accessible. It is a goal of the program to move folks to self-sufficiency and the ability to retain permanent housing.
 9. 30% of the median family income would be 31,900. We have yet to see anyone live in our tiny homes in our pilot project that makes anywhere near this amount.
 10. We are currently researching ways to have the village on solar power, either solely or in conjunction with PGE power. If it is not possible to have the village solely on solar then we may look into putting the church on solar in order to keep this project as green as possible.
 11. We already are seeking partnerships within the community between Providence, other faith communities, local contractors and connections with other service providers.

12. As this is the first transitional housing project in all of Yamhill County we are not duplicating any efforts in the county. This is innovative, following examples of other communities in Portland and Eugene.
13. We have been running the pilot project for the last two years with our tiny homes. Providence provided wrap around care to the guests and we have seen success with several guests. We believe this is a positive model designed to give folks a hand up, not a hand out.
14. Our timeline is a little vague at this point until our building permit is approved. We are currently talking with a local company to dig for the water and sewer lines and they plan to do much of the work pro bono. We are also talking with Home Builders Association to assist with gifts-in-kind as well as volunteer labor for the actual construction. We plan to host volunteer work days to incorporate members of the community into service as well.



(E) GYM

(E) TREES

DOG RUN

COMMON BUILDING

LAWN

GAZEBO

LANDSCAPED

LANDSCAPED

SIDEWALK WIDTH AT TYP UNITS

ACCESSIBLE AISLE

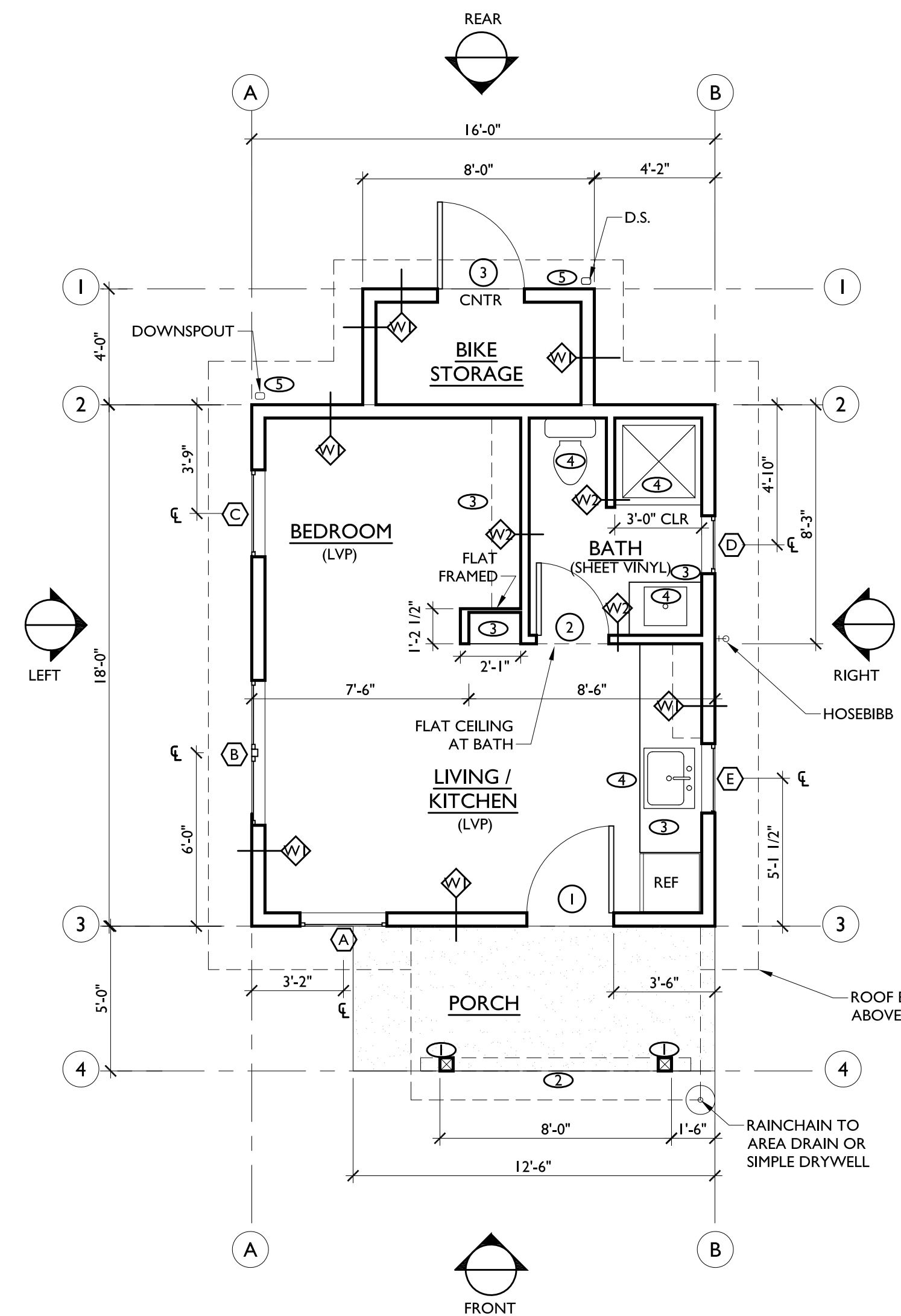
LANDSCAPE BUFFER

LANDSCAPING, TYP - PROVIDE IRRIGATION STUB OUTS

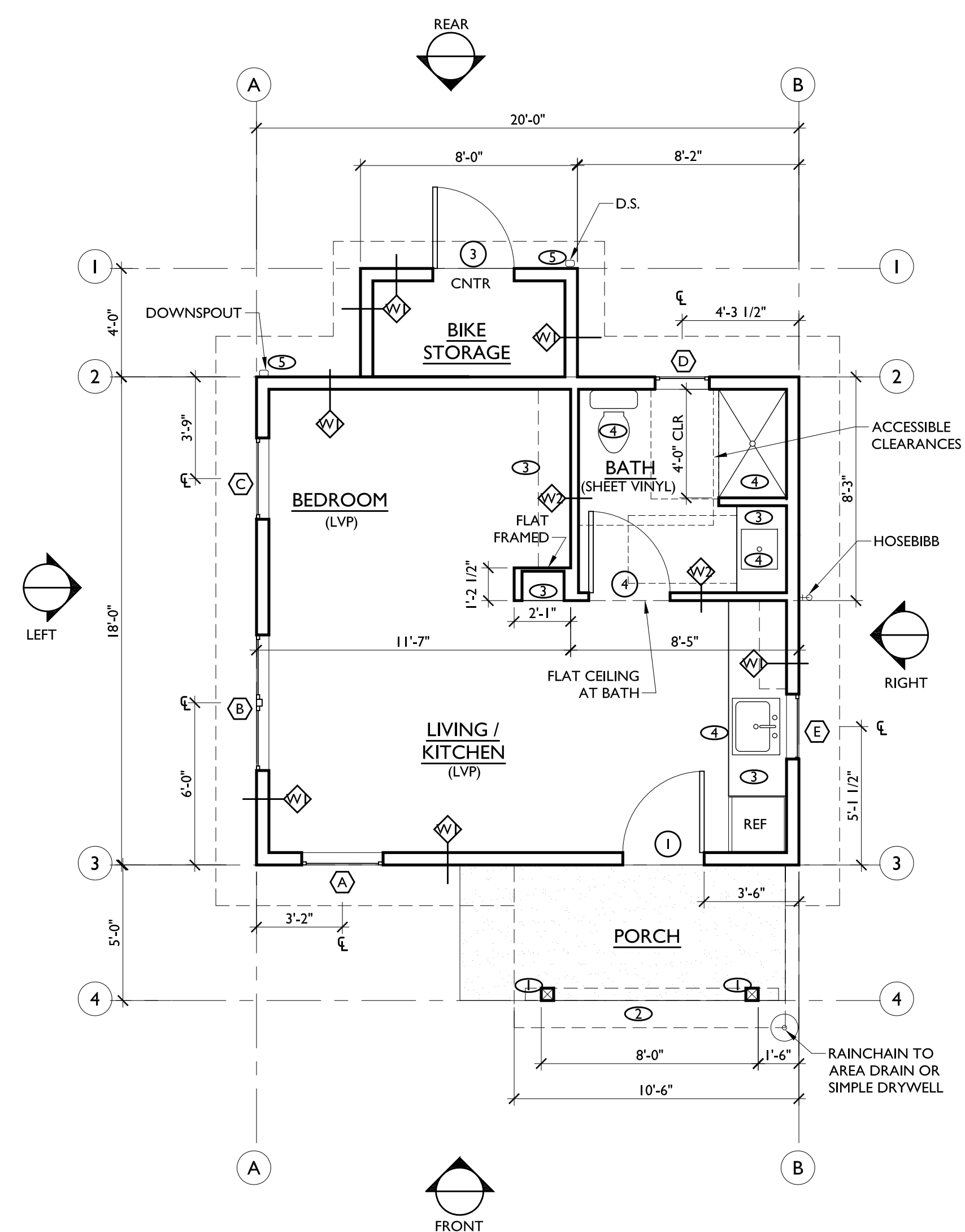
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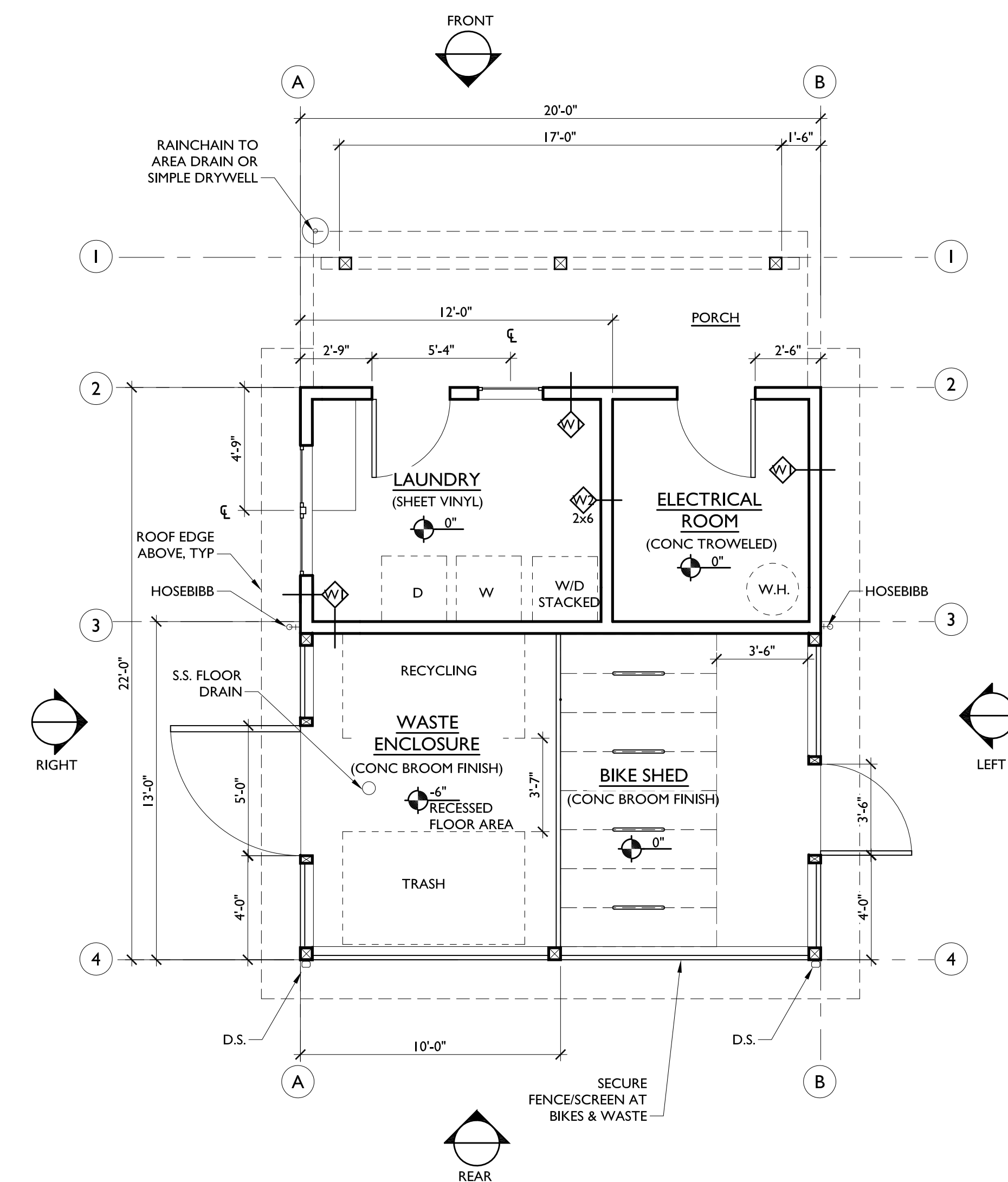
156'-0"



TYPICAL UNIT FLOOR PLAN: 1/4" = 1'-0"



ACCESSIBLE UNIT FLOOR PLAN: 1/4" = 1'-0"



COMMON ROOM FLOOR PLAN: 1/4" = 1'-0"

Doug Rux

From: Leslie Hodgdon Murray <leshodg@gmail.com>
Sent: Wednesday, March 8, 2023 5:06 PM
To: Doug Rux
Subject: Re: Affordable Housing Trust Fund Grant Application
Attachments: 230308_nvfc_marketing_pkg.pdf

This email originated from outside the City of Newberg's organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Thanks Doug - here are the updated architectural plans. Happy to share them.

1. That's a great question. We just received our approval for our land use application. We hope to pull permits to begin infrastructure work shortly (water, sewer, electrical).
2. We are applying for every grant we can! Right now we are working with Representative Salinas' office to apply for a federal grant for 725K. Our plan has always been to join together with community partners as well as apply for grants. At the church we also have significant funds to contribute (50-100K).
3. Home Builders Association has agreed to partner with us and it is unclear at this moment what all they bring to the table - they have access to funds, gifts in kind, labor and potentially a national company partnering with us as a builder captain (Lennar Homes). We are waiting to hear back what their partnership looks like. We are casting the net widely to see who has the availability and the capacity to partner.
4. yes. see attached.
5. I'm not sure how to answer this. I'm also not entirely sure what this question is asking. At this point I'm applying for grants so once we start infrastructure work/building work we will not need to stop because of a lack of funds.

I hope this is helpful. Please feel free to ask any further follow up questions.
Leslie

On Wed, Mar 8, 2023 at 1:42 PM Doug Rux <Doug.Rux@newbergoregon.gov> wrote:

Leslie,

I have received a request for additional information from one of the Affordable Housing Commission members on your grant application.

1. What is the development timeline?
2. What other funds do you expect to raise to get to the \$800,000 and how long will that take?
3. How will you start development in the Summer of 2022 and finish in December 2024 and only have half of the needed funds?

4. Can the architectural plans be shared with the Commission?

5. If you are still so far away from the \$800,000 total fundraising goal does this mean the funds would sit with the City as reserved, but not spent for possibly a couple of years?

Thanks

Doug Rux, AICP

Community Development Director

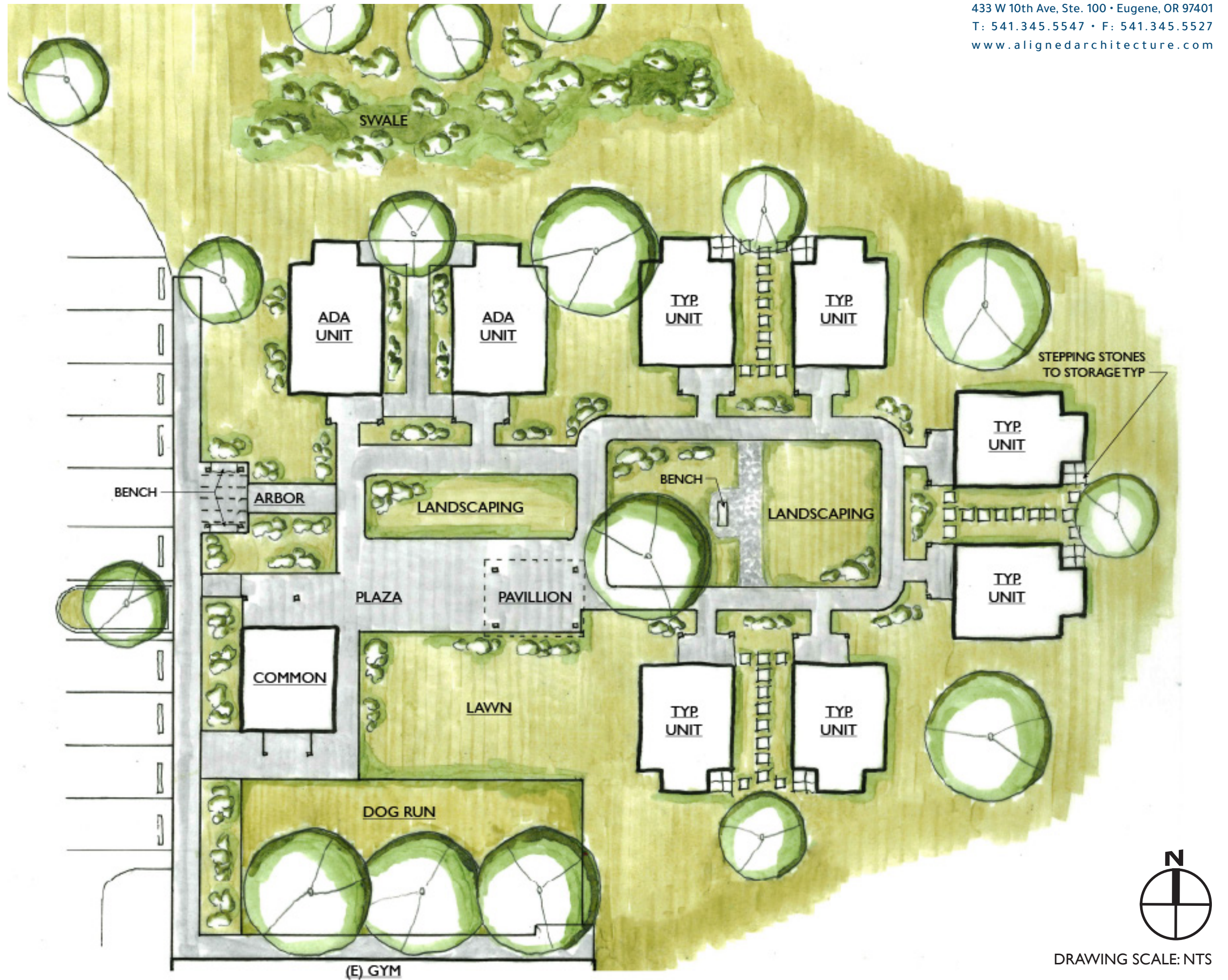
City of Newberg

Direct: 503.537.1212

Cell: 503.550.4517

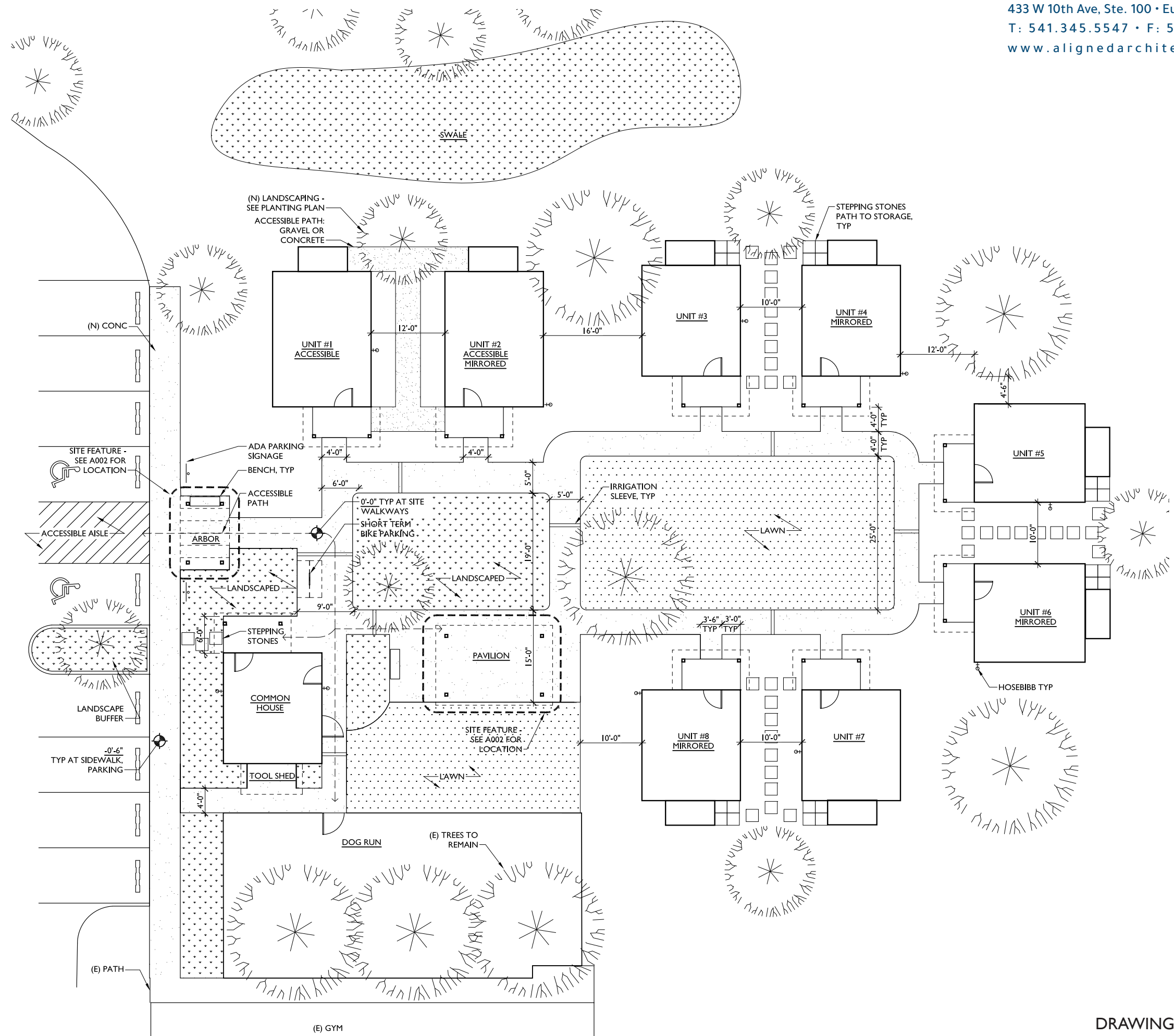
Pronouns: he/him





SITE PLAN: ILLUSTRATED
PEACE TRAIL VILLAGE
NORTH VALLEY FRIENDS CHURCH
CD • 3/8/23
MARKETING PACKAGE

N
DRAWING SCALE: NTS



SITE PLAN: ARCHITECTURAL
PEACE TRAIL VILLAGE
NORTH VALLEY FRIENDS CHURCH
CD • 3/8/23
MARKETING PACKAGE

DRAWING SCALE: NTS



AERIAL FROM WEST

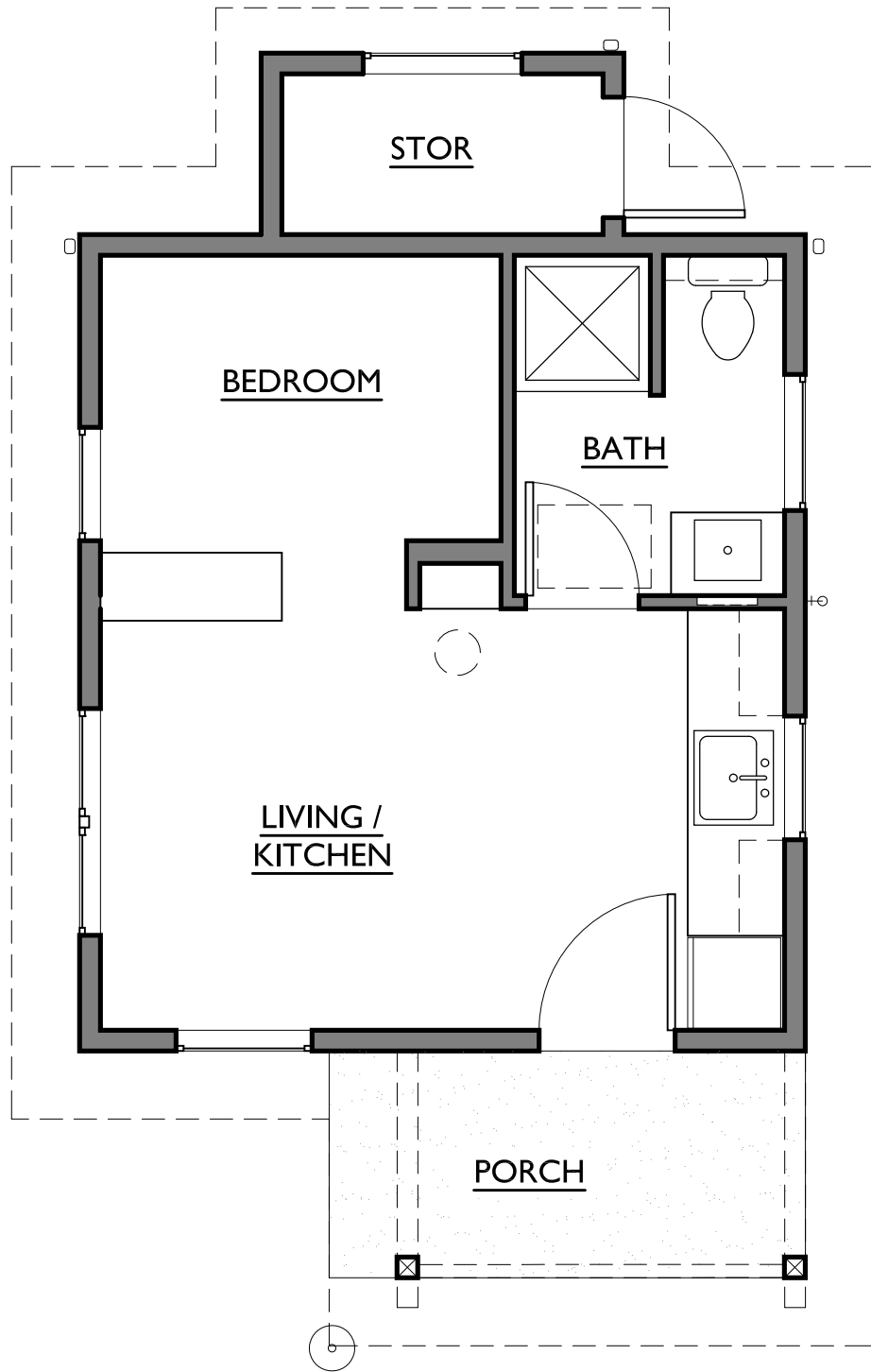


VIEW TOWARDS UNIT ENTRIES

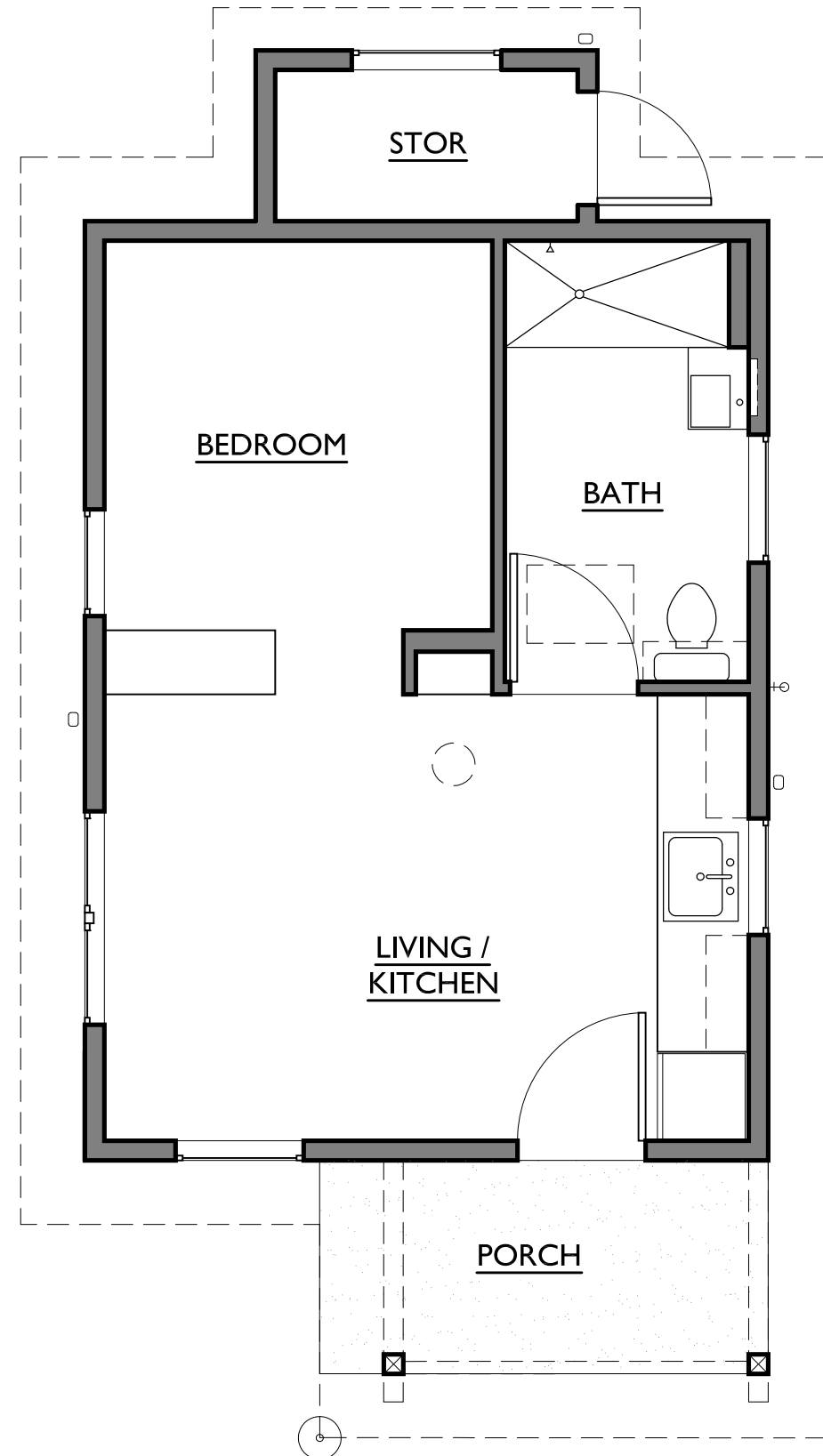
SITE PERSPECTIVES

PEACE TRAIL VILLAGE
NORTH VALLEY FRIENDS CHURCH
CD • 3/8/23
MARKETING PACKAGE

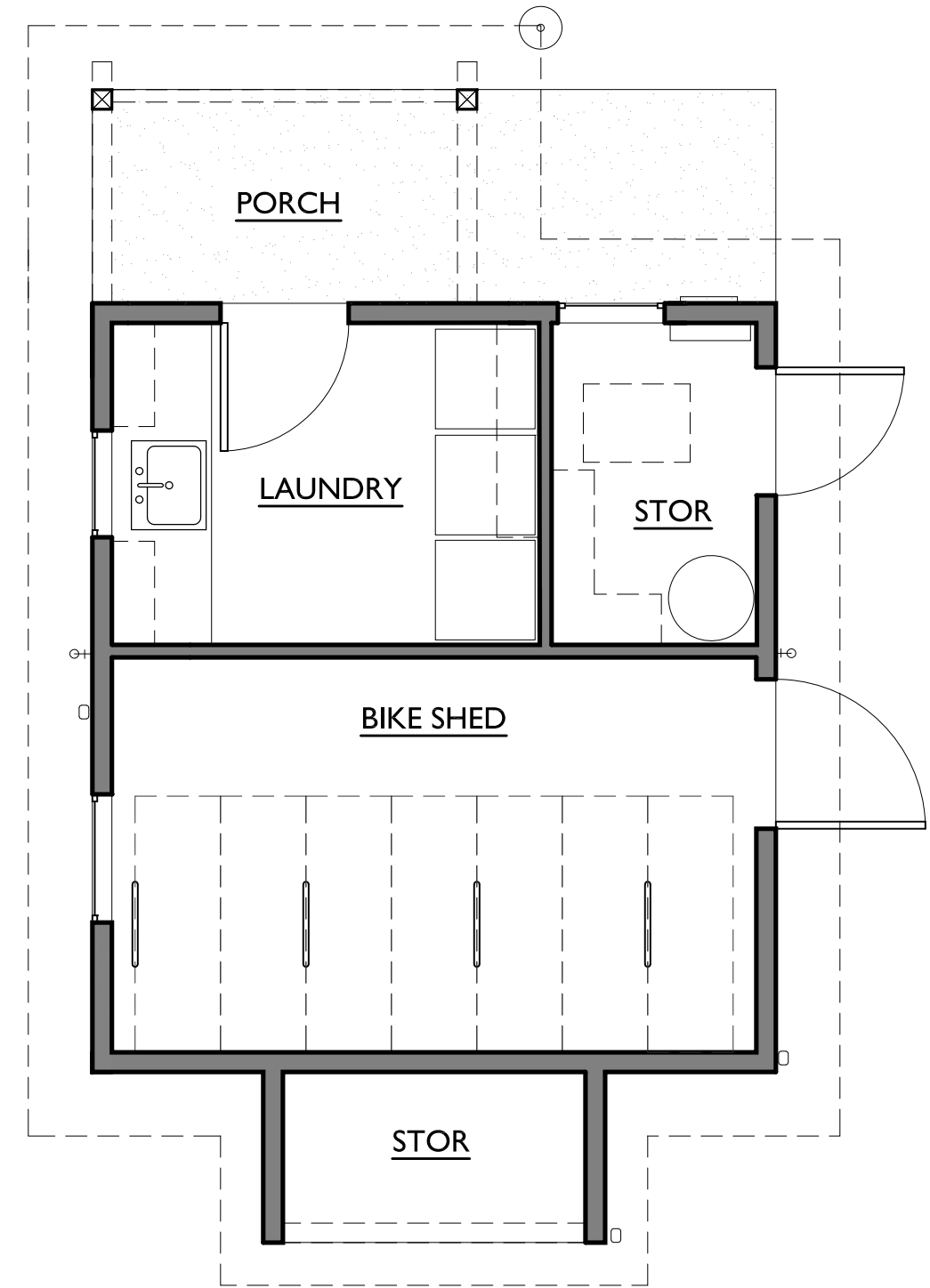
DRAWING SCALE: NTS



TYPICAL UNIT



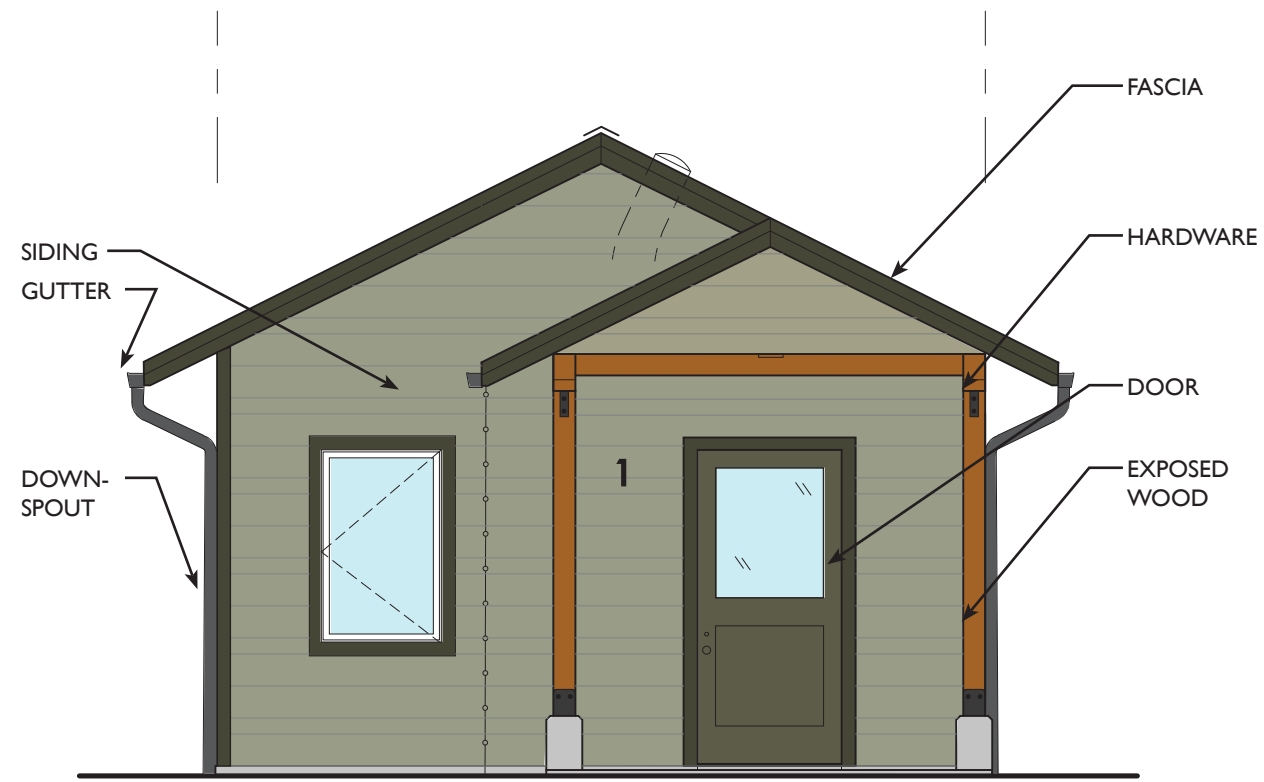
ACCESSIBLE UNIT



COMMON HOUSE

FLOOR PLANS

PEACE TRAIL VILLAGE
NORTH VALLEY FRIENDS CHURCH
CD • 3/8/23
MARKETING PACKAGE



FRONT ELEVATION



SIDE ELEVATION

SWATCHES

TYPE A BUILDING



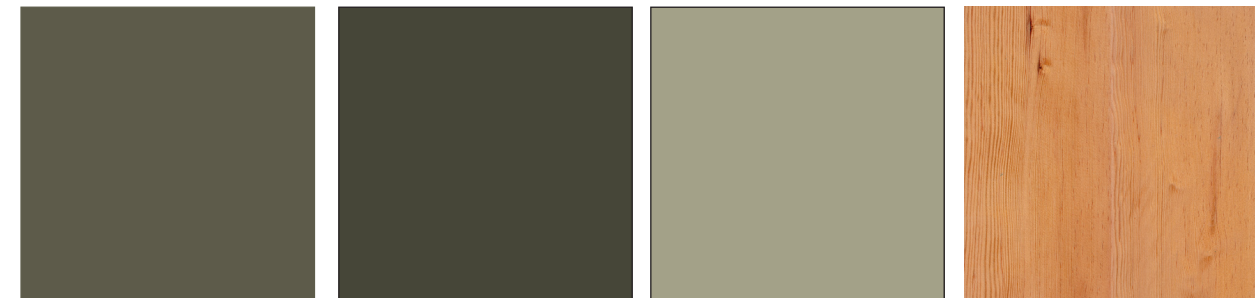
SIDING TYPICAL

TRIM
DOWNSPOUT & GUTTER
TO MATCH, DARKER

DOORS

TIMBER ELEMENTS

TYPE B BUILDING



SIDING TYPICAL

TRIM
DOWNSPOUT & GUTTER
TO MATCH, DARKER

DOORS

TIMBER ELEMENTS

EXTERIOR ELEVATIONS

PEACE TRAIL VILLAGE
NORTH VALLEY FRIENDS CHURCH
CD • 3/8/23
MARKETING PACKAGE

DRAWING SCALE: 1/4" = 1'-0"



TYPICAL UNIT ENTRY PORCH



TYPICAL UNIT KITCHENETTE

PERSPECTIVE VIEWS

PEACE TRAIL VILLAGE
NORTH VALLEY FRIENDS CHURCH
CD • 3/8/23
MARKETING PACKAGE

DRAWING SCALE: NTS

Newberg Affordable Housing Trust Fund Funding Request Application

FY 2021-22 Competitive Awards Loan Program

NOTE: The first round of applications are due September 30, 2022 at 4:30 p.m.

Applications are to be submitted to Mary Heberling-Creighton, Housing Planner by email at mary.heberlingcreighton@newbergoregon.gov or by postal mail via City of Newberg, PO Box 970, Newberg, Oregon, 97132 or by hand delivery to City Hall, 414 E First Street.

CONTACT INFORMATION:

Project Name:	
Organization Name:	<input type="checkbox"/> For-profit <input type="checkbox"/> Non-profit
Contact Name/Title:	
Mailing Address:	State/Zip:
Phone:	Email:

PROJECT INFORMATION:

Total project cost: _____
Requested amount of funding: _____ <i>Please specify the amount of loans being requested</i>
Amount and description of matching funds being contributed to the project:

Project Partners and their Contributions to the Project:

Estimated project beginning date:	Completion date:
-----------------------------------	------------------

COMMUNITY DEVELOPMENT
PLANNING DIVISION
(503) 537-1240
planning@newbergoregon.gov

Please briefly describe the affordable housing problem this project is trying to solve and how it helps in solving that challenge:

Please attach additional information that describes how this project will address the Competitive Awards Selection Criteria described in “Attachment A” of this form, including additional documentation/evidence as needed.

Information that addresses Competitive Selection Criteria, attached (please select)

Briefly describe what is attached:

ATTACHMENT A
Newberg Affordable Housing Trust Fund
FY 2021-22 Competitive Awards Program Selection Criteria

Minimum Threshold Criteria	Potential Points
1. The project is considered an eligible use or activity under Section 3, and benefits households earning less than 80% of the median family income (threshold verification)*.	NA
2. If the project is related to the provision of technical assistance to affordable housing providers, the use of Newberg Affordable Housing Trust Funds functions to increase the capacity of the organization to specifically address the mission of the NAHTF (threshold verification).	NA
3. The project is ready for implementation.	NA
4. If the project includes the acquisition of property, the identified property is currently available for acquisition and the applicant has secured either a purchase option or letter of interest from the seller. If the applicant is also applying for federal funding (i.e. Community Development Block Grants or HOME) they should carefully review procurement requirements and limitations before obtaining a purchase option.	NA
5. That relocation of existing residents will be minimized, and when necessary, the applicant has included accurate relocation assistance costs as part of the project pro forma.	NA
6. The proposal demonstrates that the Newberg Affordable Housing Trust Funds are the most appropriate funding source for the project.	NA
Scored Application Criteria	
7. The project provides new affordable housing, or new affordability, through retention or rehabilitation of existing housing, within the city.	Up to 10 points
8. The project retains the affordable housing units as affordable. The longer period of time the units remain affordable, the higher ranking the project shall be given.	Up to 15 points
9. The project provides deeply affordable housing for households earning less than 30% of the median family income.	Up to 5 points
10. The project addresses energy conservation through the integration of green building technologies in new construction, or achieves greater energy efficiency and cost savings to tenants through rehabilitation of existing housing.	Up to 5 points
11. The project maximizes partnerships in the community (volunteers, in-kind contributions, cash contributions, multiple organization involved, etc.) and demonstrates alliance building that directly benefits community members in need, such as helping build household wealth.	Up to 5 points
12. The project utilizes already existing resources in effective and innovative ways. The project shall not duplicate services provided by another organization.	Up to 10 points
13. The agency submitting the proposal has the capacity to carry out the project and has had demonstrated successes completing projects of similar scope. Higher points to projects that demonstrate engagement and contracting with D/M/W/ESB/SDVBE businesses in the last 10+ years.	Up to 10 points
14. The budget and timeline are thorough and realistic (evidence of construction and/ or service costs required with application).	Up to 10 points
Total Potential Points	70

***FOR 2022, the Median Family Income for the City of Newberg was \$106,500.**

DEFINITIONS:

“D/M/W/ESB/SDVBE” means a business that is Disadvantaged, Minority-Owned, Women-Owned, Emerging Small Businesses, and/or Service Disabled Veterans Business Enterprises.

“Gross Income” (GI) is income before taxes for all members of one family in the previous twelve months. Income can be derived from salaries, investments, self-employment, farming, and other sources. Assets such as a house or a farm are not income. For people who have wages, gross income means the figure that they would have received in their paychecks if there were no taxes. Gross income before taxes when applied to farm income means the figure that results when farm expenses are subtracted from farm sales. Gross income also includes unemployment and disability compensation, worker's compensation and severance pay; and welfare assistance payments.

“Family” means all persons living in the same household who are related by birth, marriage or adoption.

“Median Family Income” (MFI) includes the income of the householder and all other individuals 15 years old and over in the household, whether they are related to the householder or not. Because many households consist of only one person, average household income is usually less than average family income. Although the household income statistics cover the past 12 months, the characteristics of individuals and the composition of households refer to the time of application. Thus, the income of the household does not include amounts received by individuals who were members of the household during all or part of the past 12 months if these individuals no longer resided in the household at the time of application. Similarly, income amounts reported by individuals who did not reside in the household during the past 12 months but who were members of the household at the time of application are included. However, the composition of most households was the same during the past 12 months as at the time of application, as defined by the U.S. Census.

Mary Heberling-Creighton

From: Scott A. Bontrager <info@bontrager.management>
Sent: Tuesday, November 1, 2022 10:32 PM
To: Mary Heberling-Creighton
Subject: Scott & Melissa Bontrager Application addendum

This email originated from outside the City of Newberg's organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Mary,

Here is what I have typed up, that would hopefully better cover the requirements and grading list for our project.

Please let us know if there is anything else that we can provide to help with the process.

Both of the current sets of tenants/occupants in this duplex make less than 80% of the median family income annually. One of the tenants is an older, retired, lady who has a part time job, and otherwise pulls from her social security to pay rent. The other is a young family with 2 kids, where they make a combined income of less than \$60,000.

In the spirit of the mission of the NAHTF, support the development, preservation, and rehabilitation of affordable housing that is affordable to the citizens of Newberg, we are trying to ensure that we have available to our tenants a safe and affordable place for them to live. The duplex improvements we have been able to complete, are all in the spirit of increasing the quality of the home for our tenants, while making energy efficient upgrades to lower their cost of living at the same time. The completed projects at the duplex have been outlined in the original application. Remaining project items we have partnered with local builders and contractors who have been willing to donate their time and guidance to help us complete our remaining items on time and on budget. We have reached out to a number of local businesses seeking items that could be utilized in the renovations, rather than the materials being taken to the dump. We have procured cabinetry, and other building materials this way, which has been a huge help in offsetting raising material costs.

We are primed and ready to replace the driveway, having gotten 2 independent quotes from concrete contractors validating each other on the timeline, and cost of the project. All timelines and costs for building materials have skyrocketed since the start of the pandemic, but concrete costs have quadrupled, and turned a manageable job into, a major financial investment. We have been assured, that even though we are now in the rainy season, we can still move forward with the driveway replacement, and once funding has been secured, we would be scheduled for the demolition and removal of the old crumbling driveway. New concrete would be poured, and covered in plastic to cure, but that the timing of the delivery would be weather dependent, as it should not be actively raining when the finish work is completed. From where we are now, the timetable for completion of the driveway would be less than 6 weeks from funding, enveloping the waiting window, demo, leveling, pouring new driveway, and lastly beginning of the curing process.

We would be working around the occupants, and they have agreed that they would not require relocation during the time of the driveway replacement.

We purchased the duplex last year, and have been working to make these repairs and upgrades in a timeline in agreement with the occupants of the duplex. We have not initiated any applications for federal funding, or the like for this or any project.

As a private landlord, seeking assistance in funding to keep our rentals as affordable as possible for our current and future tenants in Newberg, we are hoping that the Newberg Affordable Housing Trust Funds is deemed the most appropriate funding source for the project. There were several safety concerns raised during the home inspection when we were purchasing the residence, and we have been working to address each of those areas of concern. A big ticket item that has been growing, both in risk and cost, is the issue of the failing driveway. We have been able to avoid raising rent, keeping it at the 30% of household income amount for our tenants, but in order to afford this last repair, we would be forced to raise rents to cover the cost.

We moved to Newberg in 2016 seeking a fresh start, in a place we would be proud to raise a family. We had to leave behind our full-time jobs, and started our new roots in Newberg, with Melissa attending George Fox, to get her MBA. We learned first hand how important, but also limited, affordable housing, especially in the Newberg area is. Even with both of us working, we still struggled to meet the sharply raising monthly rental rates. We wanted to be compassionate landlords, providing a safe, affordable, and comfortable place that our renters would be proud to call home. We have used this as our compass throughout our project, and that is why we are calling on NAHTF to assist us on this last project.

As stated in our original Application, we are not looking to raise rent on the occupants of the Duplex, and if awarded monetary support, we would be open to recommendations on the duration of a rent lock by NAHTF.

Thanks,
Scott and Melissa Bontrager



We build strength, stability, self-reliance *and* shelter.

Doug Rux
Community Development Director
City of Newberg
414 E First Street
Newberg, OR 97132

April 6, 2022

Re: Quarterly Progress Report Affordable Housing Trust Fund Grant

Dear Doug:

Attached please find a progress report for the period January 1 2022 – March 31, 2022.

As you will note, Newberg Area Habitat for Humanity expended \$1,532.40 in grant funds for the construction of a wheelchair ramp on South River Street in Newberg. The homeowners nearly matched that amount with a \$1,000 payment toward material costs. Habitat match (\$8,285.18) and other grants brought total A Brush with Kindness project costs to \$20,103.87 for the quarter.

Thank you very much for the opportunities this grant provides. This this of health and safety project allows Newberg residents to stay in their homes. Please let me know if I might provide additional details on this repair program.

Sincerely,

A handwritten signature in blue ink, appearing to read "Joel Stude", written over a horizontal line.

Joel Stude
Treasurer

Newberg Area Habitat for Humanity
 Affordable Housing Trust Fund Grant
 Quarterly Report

3/31/2022

Last Name	First Name	Address	Unit	Project	City Grant Funds	Habitat Match*	Other Grants	Homeowner Portion	Total	Completion Date
1 North Valley Friends Church		4020 N College Street	3	Tiny Home	\$ -		\$ 1,980.13	\$ 3,003.22	\$ 4,983.35	3/15/2022
2 Highley/Webster	James/Anita	619 S River Street		Wheelchair Ramp	\$ 1,532.40			\$ 1,000.00	\$ 2,532.40	3/15/2022
3 Brunner	Stephen	2901 E 2nd Street	142	Windows		\$ 8,285.18	\$ 4,302.94		\$ 12,588.12	In process
Shared (Salary and Overhead)										
TOTAL					\$ 1,532.40	\$ 8,285.18	\$ 6,283.07	\$ 4,003.22	\$ 20,103.87	
									\$ 20,103.87	

* Match = Salary and Overhead Jan - Mar 2022

Newberg Area Habitat for Humanity
 Affordable Housing Trust Fund Grant
 Quarterly Report

3/31/2022

USES:		Material Cost	Other Costs	Total		
Tiny Home #3	4994.29	9120.57	14114.86			
Wheelchair Ramp	3714.87	2274.14	5989.01			
Tiny Home #1	429.97		429.97			
	<u>8709.16</u>	<u>11394.71</u>	<u>20103.87</u>			
SOURCES:						
	City Grant	Direct Grants	Homeowner Portion	Overhead Grants	Habitat Match	Total
Tiny Home #3		1980.13	3003.22			4983.35
Wheelchair Ramp	1532.40		1000.00		4302.94	2532.40
Shared						12588.12
	<u>1532.40</u>	<u>1980.13</u>	<u>4003.22</u>	<u>4302.94</u>	<u>8285.18</u>	<u>20103.87</u>

Newberg Area Habitat for Humanity
A Brush with Kindness
 January through March 2022

	ABWK	TOTAL
Ordinary Income/Expense		
Income	7,815.47	7,815.47
Grants	4,003.22	4,003.22
Other Income		
Total Income	11,818.69	11,818.69
Gross Profit	11,818.69	11,818.69
Expense		
* Shared	831.66	831.66
Building Expense	8,709.16	8,709.16
Compensation	7,091.77	7,091.77
Insurance	3,471.28	3,471.28
Total Expense	20,103.87	20,103.87
Net Ordinary Income	-8,285.18	-8,285.18
Net Income	-8,285.18	-8,285.18



We build strength, stability, self-reliance *and* shelter.

RECEIVED

AUG 9 2022

Initial: _____

Doug Rux
Community Development Director
City of Newberg
414 E First Street
Newberg, OR 97132

July 29, 2022

Re: Quarterly Progress Report Affordable Housing Trust Fund Grant

Dear Doug:

Attached please find a progress report for the period April 1 2022 – June 30, 2022.

As you will note, Newberg Area Habitat for Humanity expended \$0.00 in grant funds this period. Three projects were completed during the period although none of them was grant applicable. Habitat and homeowner match and other grants brought total A Brush with Kindness project costs to \$8,718.64 for the quarter.

Thank you very much for the opportunities this grant provides. This this of health and safety project allows Newberg residents to stay in their homes. Please let me know if I might provide additional details on this repair program.

Sincerely,

A handwritten signature in black ink that reads "Shannon Knight".

Shannon Knight
Treasurer

Newberg Area Habitat for Humanity
 Affordable Housing Trust Fund Grant
 Quarterly Report

6/30/2022

Last Name	First Name	Address	Unit	Project	City Grant Funds	Habitat Match*	Other Grants	Homeowner Portion	Total	Completion Date
1 Grange 700		216 N Springbrook Rd		Window replacement	\$ -	\$ -	\$ -	\$ -	\$ -	3/15/2022
2 Rucker	Robert	2902 E 2nd Street	112	Landscape Maintenance	\$ -	\$ -	\$ -	\$ -	\$ -	3/15/2022
3 Hutton**	Cindy	17197 SW Smith	66	Deck Repair	\$ -	\$ -	\$ -	\$ -	\$ -	
Shared (Salary and Overhead)						\$ 4,501.87	\$ 3,623.18	\$ 593.59	\$ 8,718.64	
TOTAL					\$ -	\$ 4,501.87	\$ 3,623.18	\$ 593.59	\$ 8,718.64	

* Match = Salary and Overhead April - June 2022
 ** For information only, Sherwood address

Profit & Loss by Class

April through June 2022

	ABWK	TOTAL
Ordinary Income/Expense		
Income		
Grants	3,623.18	3,623.18
Other Income	593.59	593.59
Total Income	4,216.77	4,216.77
Gross Profit	4,216.77	4,216.77
Expense		
* Shared	569.47	569.47
Building Expense	197.45	197.45
Compensation	4,790.18	4,790.18
Insurance	3,154.35	3,154.35
Supplies	7.19	7.19
Total Expense	8,718.64	8,718.64
Net Ordinary Income	-4,501.87	-4,501.87
Net Income	-4,501.87	-4,501.87



We build strength, stability, self-reliance *and* shelter.

Doug Rux
Community Development Director
City of Newberg
414 E First Street
Newberg, OR 97132

October 19, 2022

Re: Quarterly Progress Report Affordable Housing Trust Fund Grant

Dear Doug:

Attached please find a progress report for the period July 1 2022 – September 30, 2022.

As you will note, Newberg Area Habitat for Humanity expended \$0.00 in grant funds this period. Three projects were completed during the period although none of them was grant applicable. Habitat and homeowner match and other grants brought total A Brush with Kindness project costs to \$8,718.64 for the quarter.

Thank you very much for the opportunities this grant provides. This health and safety focused project allows Newberg residents to stay in their homes. Please let me know if I might provide additional details on this repair program.

Sincerely,

Shannon Knight
Treasurer

Newberg Area Habitat for Humanity
Affordable Housing Trust Fund Grant
Quarterly Report

9/30/2022

	Location	Project	Name	Type	City Grant Funds	Habitat Match*	Other Grants	Homeowner Portion	Total	Completion Date
Jul-22	715 S River Street	Shower Room Repair	River Street Church	General Assistance	\$ -	\$ -	\$ -	\$ -	\$ -	6/10/2022
Jul-22	892 SW Linden Lane	Deck Repair	Byerly, Forrest	Health & Safety	\$ -	\$ -	\$ -	\$ -	\$ -	6/15/2022
Aug-22	207 W 4th Street	Window Replacement	Morales Velazquez, Call & Claudia	Health & Safety	\$ -	\$ -	\$ -	\$ -	\$ -	8/15/2022
Sep-22	17197 SW Smith Ave #65	Plumbing repair	Richardson, Patricia	Health & Safety	\$ -	\$ -	\$ -	\$ -	\$ -	9/5/2022
Sep-22	10500 NE Red Hills Road	Deck and Stair Repair	Sallia, Charles	Health & Safety	\$ -	\$ -	\$ -	\$ -	\$ -	9/10/2022
Sep-22	998 Wilsonville Road #?	Plumbing Repair	Gonglewski, Virginia	Health & Safety	\$ -	\$ 9,543.11	\$ -	\$ 637.21	\$ 8,905.90	9/15/2022
					\$ -	\$ 9,543.11	\$ -	\$ 637.21	\$ 8,905.90	

* Match = Salary and Overhead July - September 2022

** For information only, non-Newberg addresses

Newberg Area Habitat for Humanity
Profit & Loss by Class
 July through September 2022

	ABWK	TOTAL
Ordinary Income/Expense		
Income	637.21	637.21
Other Income		
Total Income	637.21	637.21
Gross Profit	637.21	637.21
Expense		
* Shared	491.34	491.34
Building Expense	2,494.33	2,494.33
Compensation	5,292.40	5,292.40
Insurance	3,748.79	3,748.79
Meetings	10.58	10.58
Supplies	0.00	0.00
Total Expense	12,037.44	12,037.44
Net Ordinary Income	-11,400.23	-11,400.23
Net Income	-11,400.23	-11,400.23



We build strength, stability, self-reliance *and* shelter.

Doug Rux
Community Development Director
City of Newberg
414 E First Street
Newberg, OR 97132

December 31, 2022

Re: Quarterly Progress Report Affordable Housing Trust Fund Grant

Dear Doug:

Attached please find a progress report for the period October 1 – December 31, 2022.

As you will note, Newberg Area Habitat for Humanity expended \$960.00 in grant funds this period. One project was completed. Habitat and homeowner match and other grants brought total A Brush with Kindness project costs to \$9,393.64 for the quarter.

Thank you very much for the opportunities this grant provides. This this of health and safety project allows Newberg residents to stay in their homes. Please let me know if I might provide additional details on this repair program.

The balance of unexpended grant funds (\$2507.60) was returned via our check number 12905 dated 12-31-22.

Sincerely,

A handwritten signature in black ink, appearing to read "Rick Rogers". The signature is stylized with a large, sweeping initial "R" and a horizontal line extending across the bottom.

Rick Rogers
Executive Director

Newberg Area Habitat for Humanity
Affordable Housing Trust Fund Grant
Quarterly Report

12/31/2022

Location	Project	Name	Type	City Grant Funds	Habitat Match*	Other Grants	Homeowner Portion	Total	Completion Date
Dec-22 4009 N College Street Newberg	HVAC Repair	Evans, Deb	Health & Safety	\$ 960.00	\$ -	\$ -	\$ -	\$ 960.00	12/31/2022
				\$ 960.00	\$ 8,433.64	\$ -	\$ -	\$ 8,433.64	
				\$ 960.00	\$ 8,433.64	\$ -	\$ -	\$ 9,393.64	

* Match = Salary and Overhead October - December 2022

RESOLUTION NO. 2023-3891



A Resolution repealing Resolution 2020-3641 Multi-year goals of the city council; and replacing it with a new list of council goals with defined objectives.

Recitals:

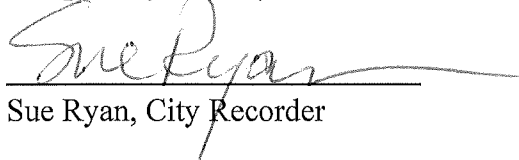
1. Whereas, the Newberg City Council met on January 17, 2023 to approve of a methodology to create new Council Goals for 2023 and beyond; and
2. Whereas, the Newberg City Council voted 7 Yes 0 No to approve a methodology that was suggested by CM Worthey provided as an exhibit to the January 17 Council session; and
3. Whereas, the Newberg City Council met on February 18, 2023 in Work Session to discuss and refine possible goals provided for in Exhibit "A" to this resolution; and
4. Whereas, the Newberg City Council debated these draft goals in the Business Session of April 3, 2023; and
5. Whereas, Council is desirous of developing a multi-year strategic plan that provides target dates, accountability and responsibility for effectuating the Council Goals as well as other City works in progress or to be undertaken.

The City of Newberg Resolves as Follows:

1. To adopt multi-year annual goals for the year 2023 as described in Exhibit "A"
2. To direct the City Manager to prepare a multi-year strategic plan providing for accountability and responsibility for measurable progress in completing the goals provided in Exhibit "A"

Effective Date of this resolution is the day after the adoption date, which is: April 4th, 2023.

Adopted by the City Council of Newberg, Oregon, this 3rd day of April, 2023.


 Sue Ryan, City Recorder

Attest by the Mayor this 7th day of April, 2023.



 Bill Rosacker, Mayor

Exhibit "A" to Resolution 2023-3891 as modified by debate and adopted on 4/4/2023
Approved 2023 Council Goals

GOAL 1: Create and maintain a high level of customer service.

- O1: Improve customer service in all departments.
- O2: Streamline the process for issuing building permits.
- O3: Create a team to involve engineering and planning in regular simultaneous review work.
- O4: Publish a customer service standard with a measurement system.

GOAL 2: Identify industrial land and attract employers to encourage family wage jobs.

- O1: Identify land other than the Mill site to zone for Light Manufacturing.
- O2: Work to bring land into the urban growth boundary to zone for light manufacturing within 5 years.
- O3: Attract family wage jobs to Newberg using the urban renewal district and CET savings to be competitive.
- O4: Remove barriers/deterrents to new, "clean" / light industrial employers that will provide family wage jobs.

GOAL 3: Ensure Newberg infrastructure (roads, water, city employees) is in good repair and supply.

- O1: Regularly review the capital improvement projects (annually).
- O2: Focus on road and sidewalk improvements in Districts 1 & 3.
- O3: Examine feasibility of increasing downtown parking.

GOAL 4: Enhance community safety.

- O1: Work with NSD to provide an additional SRO.
- O2: Install red light and speed cameras and other speed reduction measures within two years.
- O3: Continue with community policing partnerships.

GOAL 5: Create and maintain a high level of transparency with our residents in order to build trust.

- O1: Expand communication outreach in regard to regular city events and additional involvement with city businesses.
- O2: Ensure that information shared on agendas and in council meetings shall be clear and have context for the residents.
- O3: Legislative policy decisions shall require a work session before a vote.

GOAL 6: Implement a careful and prudent fiscal policy.

- O1: Begin reducing and eventually eliminate the City's debt in a steady, prudent way without compromising the City's ability to provide essential services and functions.
- O2: Reduce elements of the municipal billing statement.
- O3: The city will prudently lower SDC fees.
- O4: Ensure that the city has a long-term financial plan that supports its goals and objectives.

GOAL 7: Increase land availability for housing.

- O1: Seek to re-zone small pieces of land inside the city limits from light industrial to residential.
- O2: Work to bring land into the urban growth boundary to zone for residential purposes within 5 years.
- O3: Look at annexation opportunities.