

NEWBERG AFFORDABLE HOUSING COMMISSION AGENDA

Tuesday, April 23, 2024, 4:00 PM

Teleconference meeting

<https://us06web.zoom.us/j/84934324074>

Or Telephone: +1 360 209 5623 US

Webinar ID: 849 3432 4074

- I. CALL MEETING TO ORDER**
- II. ROLL CALL**
- III. APPROVAL OF MINUTES – January 30, 2024**
- IV. PUBLIC COMMENTS**
- V. 2023-2024 NOTICE OF FUNDING AVAILABILITY SUBMITTED APPLICATION STATUS – CONSTRUCTION EXCISE TAX FUND**
- VI. 2023-2024 NOTICE OF FUNDING AVAILABILITY SUBMITTED APPLICATION STATUS – AFFORDABLE HOUSING TRUST FUND**
- VII. REVIEW AND SCORING OF APPLICATIONS**
 - A. Construction Excise Tax Fund Applications**
 - B. Newberg Affordable Housing Trust Fund Applications**
- VIII. MISCELANEOUS ITEMS**
 - A. Discussion Regarding Future Eligibility Criteria**
- IX. NEXT MEETING – JULY 23, 2024**
- X. 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.

MEMORANDUM

TO: Affordable Housing Commission

FROM: Clay Downing AICP, Planning Manager
Leanne Wagener, Assistant Planner

SUBJECT: Agenda Items for Affordable Housing Commission Meeting

DATE: April 16, 2024

FY 2023-2024 NOTICE OF FUNDING AVAILABILITY (NOFA) SUBMITTED APPLICATION STATUS - CONSTRUCTION EXCISE TAX (CET) FUND

On January 2, 2024, the Newberg City Council authorized staff to proceed with the NOFA for the CET Fund. Up to \$397,050 was announced as available from the City's CET Fund which will award funding to projects that provide developer incentives or affordable housing programs. For CET Fund applications, applications were due by April 4, 2024. The remainder of CET Fund monies will be awarded at a later date that is yet to be determined by the Newberg City Council.

Newberg's CET sunset on July 1, 2023. Additionally, beginning April 1, 2023, taxpayers could be eligible for a refund of CET fees if a project was:

1. Assessed on or after April 1, 2023, and
2. The tax was paid on or after April 1, 2023.

Taxpayers who meet both of these criteria remain eligible for a refund for a period of up to one year from the date of payment. Since releasing the NOFA in January, the City has received and processed multiple requests for refunds in the amount of approximately \$107,905.28. It is expected that this reduction from the CET Fund will result in a commensurate reduction in funding being available for the current distribution of CET monies. At this time Community Development staff are working with the City's Finance Department to obtain a more precise recalculation of funds available for the current funding round. The updated recalculation will be provided to the AHC at the earliest available opportunity.

By the application closing date of April 4, 2024, staff received a total of six (6) applications for CET funds. After working with applicants with their submittals, five (5) applications were deemed complete, and the remaining incomplete application was duplicated by another party. The list of applicants and their requests are as follows:

- **Housing Authority of Yamhill County** submitted a complete application requesting \$262,500 of the CET funds with the present disbursement. Their request falls under the

category of an *Affordable Housing Program*, and their application describes a robust program aimed at facilitating home repairs for low, very low, and extremely low income homeowners (approximately eighteen households) within Newberg.

- **Catholic Charities of Oregon, Edlen & Company and Community Wellness Collective in partnership with Providence** submitted a complete joint application requesting the full disbursement amount with consideration for the Legacy disbursement to be made available at a later date. Their request falls under the *Developer Incentives* category, and their application describes a comprehensive housing project intended to alleviate housing insecurity for at-risk, very low to extremely low income residents of Newberg. The project proposes a variety of housing types including recuperative, permanent supportive, and workforce housing.
- **Avamere at Newberg** submitted three (3) applications on behalf of current residents who are in arrears on past rent. These applications are not part of an *Affordable Housing Program* or a *Developer Incentive* category as defined and required by the Newberg Municipal Code for consideration of CET funding allocation. The total amount requested is \$19,175.21. The requests are aimed at bringing very low income residents with medical needs up to date on their rent at Avamere, which operates as a for-profit business in Newberg.
- **Robert Velez, on behalf of his brother John Velez who resides at Avamere at Newberg**, submitted an incomplete application. The application is not part of an *Affordable Housing Program* or *Developer Incentive* category as defined and required by the Newberg Municipal Code for consideration of CET funding allocation. The total amount requested is \$9,634.61. The request is aimed at bringing a very low income resident with medical needs up to date on their rent at Avamere, which operates as a for-profit business in Newberg. This is a duplicate application with the Avamere at Newberg application set mentioned above.

FY 2023-2024 NOFA FOR THE NEWBERG AFFORDABLE HOUSING TRUST FUND (NAHTF)

On December 16, 2023, the Newberg City Council authorized staff to proceed with the NOFA for the NAHTF. Up to \$64,057 in loans and grants was announced as available from the NAHTF which is intended to assist with the creation and/or acquisition of new affordable housing or the maintenance of the existing affordable housing inventory. For NAHTF applications, the first round of applications was due on April 4, 2024, for the portion of funding that is time sensitive. However, other portions of the NAHTF monies will remain available for consideration while funds remain.

By the closing date of April 4, 2024, staff received a total of one (1) application for the NAHTF monies. The applicant and their requests is as follows:

- **Newberg Area Habitat for Humanity** has submitted a complete application requesting \$28,580 for a Time-sensitive Grant. The money requested will be put towards building three new single-family homes to be sold at affordable prices to first-time homebuyers who earn between 25 and 60% average median income.

REVIEW AND SCORING OF APPLICATIONS FOR THE NAHTF AND CET FUND

The AHC is tasked with scoring each eligible application according to the appropriate codes and ordinances for determination of award. It should be noted that there is a competitive aspect to scoring multiple applications received for the CET fund and any affordable housing funding category. Higher scores should be given to applications that *most* fit the predetermined criteria for each fund allocation.

Staff has made a preliminary score for each complete application submitted. These should be treated as a guide, but not as the authoritative measure of each application as the AHC and City Council have the reserved authority to score and award fund monies.

Staff are providing the applications in advance of the meeting with the hope that commissioners will review and consider materials *before* the meeting is convened. The AHC will be expected to work together to identify appropriate scores during the April meeting for each application so that the AHC's scoring and recommendation can be transmitted to City Council.

A. Construction Excise Tax Fund Applications

Application materials are provided along with a summary of staff's review and scoring of applications. See attachments in agenda packet including those for the Housing Authority of Yamhill County (Attachment 1); Catholic Charities of Oregon, Edlen & Company, Community Wellness Collective in partnership with Providence (Attachment 2); Avamere at Newberg (Attachment 3); and Robert Velez on behalf of John Velez (Attachment 4).

Staff Recommendation

Staff recommends the Affordable Housing Commission consider the applications for the Construction Excise Tax Fund, score the applications, and forward a recommendation to fund or not fund selected projects to City Council.

B. Newberg Affordable Housing Trust Fund Applications

Application materials are provided along with a summary of staff's review and scoring of applications. See attachments in agenda packet including those for the Newberg Area Habitat for Humanity (Attachment 5).

Staff Recommendation

Staff recommends the Affordable Housing Commission consider the application for the Newberg Affordable Housing Trust Fund score the applications, and forward a recommendation to fund or not fund selected projects to City Council.

MISCELLANEOUS ITEMS - FUTURE ELIGIBILITY CRITERIA AND STAFF RESEARCH

During the January 30, 2024, meeting of the AHC, the committee reiterated a request for further discussion about the eligibility of 501c3, private (for-profit) landlord, quasi-governmental entities. Based on this request, staff looked into existing regulations and internal references to the individuals and/or organizations eligible for funding.

At this time, the AHC is evaluating two separate funding sources with two different regulatory sections in the Newberg Municipal Code (NMC):

- NMC Chapter 3.35 Newberg Affordable Housing Trust Fund and
- NMC Chapter 3.60 Construction Excise Tax

According to NMC 3.35.040, the administrative procedures associated with the Newberg Affordable Housing Trust Fund (NAHTF) are established by resolution of the City Council. The most recent adoption of these procedures occurred on April 8, 2021, through adoption of resolution number 2021-3730 (Attachment 6). The resolution includes sections dedicated to the NAHTF's:

- Purpose;
- Eligible applicants;
- Eligible uses and activities;
- Program goals;
- Fund administration;
- Match requirements;
- Allocation of funds;
- Competitive awards program;
- Rehabilitation loan program;
- Manufactured home rehabilitation and repair grant program;
- NAHTF competitive grant or loan award, threshold; and selection criteria; and
- Fund revenue.

Section 2 of NAHTF Policy and Procedures includes the following policies:

Policy 2.1: The Newberg Affordable Housing Trust Fund is structured to ensure that many different types of organizations and persons are eligible to receive funds.

Policy 2.2: Eligible applicants include governmental subdivisions, community development corporations, local housing authorities, community action agencies, community based or neighborhood-based non-profit housing organizations, other non-profit organizations, for-profit entities and private employers, and private landlords.

Whereas, the NAHTF includes a policies specifying that “many different types of organizations

and persons are eligible” for funding, Newberg’s Construction Excise Tax (CET) has no such specifications regarding awards. Rather, the CET fund relies on language regarding its purpose (NMC Section 3.60.101) and use of funds (NMC Section 3.60.090) to determine appropriate uses. Key terms “developer incentives” and “affordable housing programs” are reference in NMC Section 3.60.090 which states:

...

C. The city may fund *developer incentives* allowed or offered pursuant to ORS 197.309(5)(c) and (d) and (7)¹, including but not limited to:

1. System development; and
2. Land acquisition; and
3. Local public improvements required by municipal governments.

D. The city may fund *affordable housing programs* in accordance with ORS 320.195, including but not limited to:

1. Rent buy-downs and subsidies; and
2. Down-payment assistance; and
3. Foreclosure-prevention assistance.

...

¹ Renumbered ORS 197A.465 in 2023, which states:

...

(5) A regulation, provision or requirement adopted or imposed under subsection (4) of this section:

(c) Must provide developers the option to pay an in-lieu fee, in an amount determined by the city or county, in exchange for providing the requisite number of housing units within the multifamily structure to be sold or rented at below-market rates.

(d) Must require the city or county to offer a developer of multifamily structures, other than a developer that elects to pay an in-lieu fee pursuant to paragraph (c) of this subsection, at least one of the following incentives:

- (A) Whole or partial fee waivers or reductions.
- (B) Whole or partial waivers of system development charges or impact fees set by the city or county.
- (C) Finance-based incentives.
- (D) Full or partial exemption from ad valorem property taxes on the terms described in this subparagraph. For purposes of any statute granting a full or partial exemption from ad valorem property taxes that uses a definition of “low income” to mean income at or below 60 percent of the area median income and for which the multifamily structure is otherwise eligible, the city or county shall allow the multifamily structure of the developer to qualify using a definition of “low income” to mean income at or below 80 percent of the area median income.

...

(7) Subsection (4) of this section does not restrict the authority of a city or county to offer developers voluntary incentives, including incentives to:

- (a) Increase the number of affordable housing units in a development.
- (b) Decrease the sale or rental price of affordable housing units in a development.
- (c) Build affordable housing units that are affordable to households with incomes equal to or lower than 80 percent of the median family income for the county in which the housing is built.

In addition to the above details, the below terms are highlighted for AHC consideration of existing working definitions related to affordable housing in Newberg:

	Definitions	Source
Affordable Housing	Residential housing primarily for households or persons earning less than 80 percent the area median income where housing costs or rent do not constitute more than 30 percent the household income, and as more fully defined per city resolution.	NMC 3.35.020
	Housing unit for which a person earning 80 percent or less of area median income would not pay more than 30 percent of their gross income for housing payments.	NMC 3.60.020
Affordable Housing, Deeply	Affordable housing available to households earning 50% or less of median family income.	CET Fund Application NAHTF Application
Affordable Housing, Extremely	Affordable housing available to households earning 30% or less of median family income.	CET Fund Application NAHTF Application
D/M./W/ESB/SDVBE businesses	A business that is Disadvantaged, Minority-Owned, Women Owned, Emerging Small Businesses, and/or Service Disabled Veterans Business Enterprises.	CET Fund Application NAHTF Application
Section 3	Reference to “Section 3” of the HUD Act of 1969 and US Department of Housing and Urban Development (HUD) program which outlines who qualifies for HUD programs. See also HUD FAQ’s for Section 3: hud.gov/sites/dfiles/FPM/documents/Section-3-FAQs.pdf	CET Fund Application NAHTF Application

ATTACHMENTS

1. CET Fund Application – Housing Authority of Yamhill County
 - a. Summary of Staff Review
 - b. Application Materials
2. CET Fund Application - Catholic Charities of Oregon, Edlen & Company and Community Wellness Collective in partnership with Providence
 - a. Summary of Staff Review
 - b. Application Materials
3. CET Fund Application – Avamere at Newberg

- a. Summary of Staff Review
 - b. Application Materials
4. CET Fund Application – Robert Velez on behalf of John Velez
 - a. Application Materials
5. NAHTF Application – Newberg Area Habitat for Humanity
 - a. Summary of Staff Review
 - b. Application Materials
6. Resolution No. 2021-3730 A Resolution Amending Policies and Procedures for Administration of the City of Newberg’s Affordable Housing Trust Fund (Membership) and Repealing Resolution No. 2018-3457

Attachment 1.a

**CET Fund Application – Housing Authority of Yamhill County
Staff Evaluation**

ATTACHMENT A

Construction Excise Tax (CET) Fund FY 2022-23 Competitive 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 for a period of at least 60 years following the date of construction (threshold verification)*.	NA Program meets criteria
2. The project is ready for implementation with documentation to demonstrate financial feasibility.	NA Program meets criteria
3. 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, review procurement requirements and limitations before obtaining a purchase option.	NA Program meets criteria
4. 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 Program meets criteria
5. The proposal demonstrates that the Construction Excise Tax (CET) Funds are the most appropriate funding source for the project. Provide a description of a financing gap that includes funding sources or demonstrates budget constraints that limit the ability to pay or finance projects.	NA Program meets criteria
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 Staff awards 10 points
8. The project provides deeply affordable housing for households earning less than 50% of the median family income.	Up to 10 points Staff awards 10 points
9. The project provides extremely affordable housing for households earning less than 30% of the median family income. Projects could include permanent supportive housing and/or transitional housing for families or individuals who are houseless.	Up to 5 points Staff awards 5 points
10. Project concepts and designs showing close proximity to schools, parks, commercial areas, public transportation, services and jobs, and demonstration of cost-effective sustainability and energy-efficiency measures.	Up to 10 points Staff awards 10 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 Staff awards 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 Staff awards 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 Staff awards 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 Staff awards 10 points
Total Potential Points	70

Staff awards 70 total points

Attachment 1.b

**CET Fund Application – Housing Authority of Yamhill County
Application Materials**



Newberg Construction Excise Tax (CET) Funding Request Application

NOTE: The first round of applications are due April 4, 2024 at 4:30 p.m.

Applications are to be submitted to Leanne Wagener, Assistant Planner by email at leanne.wagener@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: 2024 Newberg Home Rehabilitation Grant Program		
Organization Name: Yamhill County Affordable Housing Corporation	<input type="checkbox"/> For-profit	<input checked="" type="checkbox"/> Non-profit
Contact Name/Title: Mark Irving		
Mailing Address: 135 NE Dunn Place McMinnville	State/Zip: OR 97128	
Phone: 503-883-4324	Email: mark@hayc.org	

PROJECT INFORMATION: COMMUNITY DEVELOPMENT PLANNING DIVISION

Total project cost: \$262,500	
Requested amount of CET funding: \$262,500	
Has this project requested or will request funds from the Affordable Housing Trust Fund?	<input type="checkbox"/> No Yes Amount requested: _____
Amount and description of other matching funds being contributed to the project, if applicable: _____	
Has this organization received Newberg CET funds in the past?	<input type="checkbox"/> No Yes Amount received: _____

Project Partners and their Contributions to the Project: None

Estimated project beginning date: As soon as grant is awarded	Completion date: 12 months from award date
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(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: Opportunity / Problem: A significant number of low and very low-income residents in this community are residing in homes they own or are buying. Many of these homes need critical repairs or modifications in order to: preserve the units; sustain a healthy living environment; meet the needs of disabled residents; and maintain, in many cases, the only affordable option for these families. This population is largely made up of senior and disabled households and families with small children. These households are disproportionately vulnerable to displacement because they do not have the necessary resources to pay for critical repairs to their homes and cannot afford any other type of housing. The need in this region is further demonstrated by the large number of applications on the regional Housing Rehabilitation Waiting list. There are a total of 213 applications on the county wide waiting list from low-income owners. A total of 68 of these families are residing within Newberg city limits.

Proposal / Solution: Many of these homeowners do not have the financial stability to use more traditional forms of financing to make repairs. A grant opportunity such as the 2024 Newberg Home Rehabilitation Grant Program would allow our region to address many of these critical housing issues by providing owners with a way to pay for their much-needed repairs or modifications.

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.

Briefly describe what is attached:

- A. YCAHC IRS 501 C3**
- B. YCAHC Budget**
- C. Income Limits**
- D. Participant application**
- E. Rehabilitation Contract**

Newberg Construction Excise Tax Funding Request

#1 Eligible for use or activity under Section 3.

Currently, Oregon is among the states with the lowest supply of properties that are considered affordable to people at or below poverty levels. A unit is considered affordable if it costs someone 30% or less of their income. After spending limited or fixed income on basic needs, many low-income homeowners are barely able to pay their mortgage and struggle greatly to pay for routine maintenance, accessibility modifications or repairs on their aging homes.

This project would benefit approximately 18 households earning less than 80% of the median family income to retain, which in many cases would be their only option for affordable housing.

#2 Project background, readiness, and projected costs.

Background/Readiness

The Yamhill County Housing Rehabilitation Program has aided lower income homeowners throughout the county to make necessary repairs and upgrades to their homes since 1980. The program is funded largely through Community Development Block Grants (CDBG's) that are awarded to local jurisdictions by the state's Infrastructure Finance Authority, a department within the Oregon Business Development Department.

These grants are administered by the Yamhill County Affordable Housing Corporation (YCAHC) and its agent, the Housing Authority of Yamhill County (HAYC).

Assistance had traditionally only been provided as 0% deferred, or 2% loans. In 2013 the state started to allow jurisdictions the option of applying for CDBG projects to give homeowners grants instead of loans. This program is highly successful, assisting hundreds of homeowners complete much needed repairs and accessibility modifications to their homes. Our most recent CDBG project is nearly complete. We have been able to assist a total of 30 families in Newberg complete repairs and or accessibility modifications to their homes totaling \$395,000.

The Housing Rehabilitation program currently has 213 applicants on its county-wide waiting list with 68 of these families residing in the City of Newberg.

If funds are awarded, assistance would be provided to qualifying families in the form of grants of up to \$12,395 or the actual cost of the repair, whichever is less, to address immediate health, safety, or accessibility issues for low-income homeowners residing in the City of Newberg. This will ultimately help them to remain in their homes and help to maintain affordable housing in your community.

If funds are awarded, YCAHC would be able to immediately begin the process of pulling prospective participants from the waiting list, vetting them, verifying their needs, obtaining bids, and completing the repairs. The anticipated completion date would be 12 months from the date of the award.

Newberg Construction Excise Tax Funding Request

Projected Costs

15% of the total award would be used for administration costs.

If awarded the full amount requested	\$262,500
Admin fee of 15%	\$39,375
18 families @ \$12,395.83 per	\$223,125

If the total amount requested is not awarded, a lesser value would be accepted as the need would still be there. We would be able to assist as many families as possible with whatever funds are awarded.

#3 Acquisition of Property: Does not apply.

Only existing homes owned by low-income homeowners within Newberg city limits will be worked on.

#4 Relocation of Existing Residents.

Involuntary displacement of existing residents is not anticipated as a result of the proposed project. If displacement becomes necessary, alternatives will be examined to minimize the displacement and provide required/reasonable benefits to those displaced.

#5 CET Funds Appropriate for this project.

YCAHC does not have available funds for Housing Rehabilitation grants. We only have a revolving loan fund that is currently on pause, and we rely on CDBG funds and other available funding for our grant program. YCAHC currently has an open CDBG for the city of Newberg to provide grants to homeowners living in manufactured homes in a park. 100% of the funds have been obligated with additional applications still coming in. YCAHC currently has no resources to address the need presented in this grant application. The YCAHC budget is available in the attachments and shows that all the funds are earmarked for specific programs: the County Wide Revolving Loan Program, the Housing Resource Center, and the Homeownership program. As the budget demonstrates, YCAHC currently does not have any available funds on-hand that could be utilized to carry out this proposed grant program.

See "Attachment B" YCAHC budget.

Newberg Construction Excise Tax Funding Request

#7 The project provides affordability through retention of existing housing within the city.

100% of the homes that are rehabilitated with funds received from this grant, will be occupied by families making less than the 2023 income limits published by HUD (see "Attachment C" income limits). These homes will all be within the Newberg city limits. All recipients will be required to provide proof of ownership for a minimum of 6 months prior to receiving any assistance. They will also need to be current on their taxes, mortgage payments (if applicable), and homeowner insurance. The completion of these critical repairs will not only lead to extending the useful life of the residence but will also allow the occupants to retain what could be their only existing affordable housing.

#8 This project will provide deeply affordable housing, though retention of existing housing, for households earning less than 50% of the median family income.

All applicants pulled from our wait list will be required to complete a grant application (see "Attachment D" grant application). This application will ask for proof of income for all family members. A priority will be given to families that fall in the very low or extremely low-income bracket. It is anticipated that approximately 60% of all recipients will fall in the low or extremely low-income bracket.

#9 This project will provide extremely affordable housing, though retention of existing housing, for households earning less than 30% of the median family income.

All applicants pulled from our wait list will be required to complete a grant application (see "Attachment D" grant application). This application will ask for proof of income for all family members. A priority will be given to those families that fall in the low or very low-income bracket. It is anticipated that 40% of all recipients will fall in the very low or low-income bracket.

#10 Project concepts and designs showing close proximity to schools, parks, commercial areas, public transportation, services and jobs, and demonstration of cost-effective sustainability and energy-efficiency measures.

All recipients of grant funds will reside within the city limits of Newberg. To ensure all rehabilitation projects use the money awarded in a cost-effective way, each project will need a minimum of three bids. These bids will be reviewed and approved by a representative of YCAHC prior to the start of any work. The party assigned the task of bid review will be well versed in current pricing of similar repairs. The rehabilitation contract (see "Attachment E" rehabilitation contract) will include verbiage requiring the contractor to complete the rehabilitation project using the most energy efficient measures possible.

Newberg Construction Excise Tax Funding Request

#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.

YCAHC is a 501(c)(3) organization formed in 2002 (see "Attachment A") for the purposes of promoting homeownership for low and moderate-income citizens by developing, purchasing, selling, conserving, and rehabilitating housing located in Yamhill County and all related purposes including but not limited to: homeownership counseling, energy conservation programs, safe housing programs, and low-income housing repair programs.

YCAHC and HAYC administer four homeownership related programs and activities.

- The Housing Rehabilitation Revolving Loan Program helps low to moderate income homeowners in Yamhill County to make necessary repairs and upgrades to their home. We offer 0% interest, 0% deferred payment loans to homeowners and 2% installment loans for households with low to moderate incomes.
- The Housing Rehabilitation Grant Program offers grants to low-income homeowners to address immediate health and safety, or accessibility issues in their homes.
- The Resource Center offers counseling for anything related to being or becoming a homeowner: credit repair, financial literacy classes, pre-purchase counseling, and first time homeownership classes. The Resource Center is in HAYC's office building and provides several computer consoles for internet access as well as brochures and resources of other agencies plus one-on-one counseling to help individuals find a job, seek education, and pursue housing needs.
- The Family Self-Sufficiency Program helps individuals or families that are Section 8 voucher holders become self-sufficient in whatever goal they set for themselves. An FSS client receives one-on-one support from their FSS Coordinator who help them make progress towards goals and provide the following support resources: Education or training, job placement, counseling, budgeting, and home ownership preparation. Most clients that move forward with homeownership do so with the help of our rehabilitation/homeownership program where clients are able to afford the homes that are offered below market prices.

YCAHC has a working relationship with several service organizations throughout Yamhill and surrounding counties. These relationships help us to recognize need, find any available resources, and direct them to the most applicable recipients.

Newberg Construction Excise Tax Funding Request

#12 & #13 The project utilizes already existing resources in effective and innovative ways. The project shall not duplicate services provided by another organization. The agency submitting the proposal has the capacity to carry out the project and has had demonstrated successes completing projects of similar scope.

YCAHC and HAYC staff have conducted several rehabilitation projects within this region.

- 2012 \$100,000 Innovations grant from OHCS in which 23 homes had repair projects completed.
- 2014 the City of McMinnville was awarded a \$400,000 CDBG. This project was administered by YCAHC and HAYC and closed out successfully. 52 homes were repaired.
- 2016 the City of Newberg was awarded a \$400,000 CDBG, also administered by YCAHC and HAYC and closed out successfully. 38 homes were repaired with this project.
- 2018 YCAHC and HAYC administered a county wide \$100,000 Meyer Memorial project for older manufactured homes that assisted 13 households.
- 2019 the City of McMinnville was awarded a \$500,000 CDBG, also administered by YCAHC and HAYC and closed out successfully. 35 homes were repaired.
- In 2021 The City of Newberg was awarded a \$500,000 CDBG that is being administered by YCAHC and HAYC, this project is nearing its end and upon its successful completion, will have completed repairs to 30 homes.

Many agencies can only aid low-income homeowners for very specific repairs, weatherization, windows, insulation, HVAC system upgrades, etc. Few are able to offer assistance for a broad range of repairs or modifications based on the owner's specific needs, this is where we can make a significant impact on homeowners that have been otherwise unable to obtain assistance.

#14. The budget and timeline are thorough and realistic.

15% of the total award would be used for administration costs.

If awarded the full amount requested	\$262,500
Admin fee of 15%	\$39,375
18 families assisted @ \$12,395.83 per	\$223,125

If the total amount requested is not awarded, a lesser value would be accepted as the need would still be there. We would be able to assist as many families as possible with whatever funds are awarded.

Newberg Construction Excise Tax Funding Request

YCAHC has been successful in processing home rehabilitation grants at a rate of 15-20 per year. We have an extensive list of prospective recipients, experienced staff, and a list of contractors that we have successfully worked with. If awarded this grant, YCAHC can begin working on this project immediately, with an anticipated completion date of 12 months from the date of award.

I am happy to answer any questions you may have.

**Mark Irving
YCAHC Rehabilitation Specialist
503-883-4324
mark@hayc.org**

Attachment A

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **MAY 14 2002**

Employer Identification Number:
93-1327751

DLN:
17053018007022

THE YAMHILL COUNTY HOUSING
REHABILITATION ASSOCIATION
C/O HOUSING AUTHORITY OF YAMHILL COUN
PO BOX 865 414 NE EVANS ST
MCMINNVILLE, OR 97128

Contact Person: SCOTT P BANTLY ID# 31398
Contact Telephone Number:
(877) 829-5500

Accounting Period Ending:
September 30

Foundation Status Classification:
509(a)(1)

Advance Ruling Period Begins:
May 17, 2001

Advance Ruling Period Ends:
September 30, 2005

Addendum Applies:
No

RECEIVED

MAY 23 2002

HOUSING AUTHORITY
OF YAMHILL COUNTY

Dear Applicant:

Based on information you supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably expect to be a publicly supported organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

Accordingly, during an advance ruling period you will be treated as a publicly supported organization, and not as a private foundation. This advance ruling period begins and ends on the dates shown above.

Within 90 days after the end of your advance ruling period, you must send us the information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, we will classify you as a section 509(a)(1) or 509(a)(2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, we will classify you as a private foundation for future periods. Also, if we classify you as a private foundation, we will treat you as a private foundation from your beginning date for purposes of section 507(d) and 4940.

Grantors and contributors may rely on our determination that you are not a private foundation until 90 days after the end of your advance ruling period. If you send us the required information within the 90 days, grantors and

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THE YAMHILL COUNTY HOUSING

HOUSING AUTHORITY
OF YAMHILL COUNTY

contributors may continue to rely on the advance determination until we make a final determination of your foundation status.

If we publish a notice in the Internal Revenue Bulletin stating that we will no longer treat you as a publicly supported organization, grantors and contributors may not rely on this determination after the date we publish the notice. In addition, if you lose your status as a publicly supported organization, and a grantor or contributor was responsible for, or was aware of, the act or failure to act, that resulted in your loss of such status, that person may not rely on this determination from the date of the act or failure to act. Also, if a grantor or contributor learned that we had given notice that you would be removed from classification as a publicly supported organization, then that person may not rely on this determination as of the date he or she acquired such knowledge.

If you change your sources of support, your purposes, character, or method of operation, please let us know so we can consider the effect of the change on your exempt status and foundation status. If you amend your organizational document or bylaws, please send us a copy of the amended document or bylaws. Also, let us know all changes in your name or address.

As of January 1, 1984, you are liable for social security taxes under the Federal Insurance Contributions Act on amounts of \$100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the private foundation excise taxes under Chapter 42 of the Internal Revenue Code. However, you are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please let us know.

Donors may deduct contributions to you as provided in section 170 of the Internal Revenue Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Donors may deduct contributions to you only to the extent that their contributions are gifts, with no consideration received. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as deductible contributions, depending on the circumstances. Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, gives guidelines regarding when taxpayers may deduct payments for admission to, or other participation in, fundraising activities for charity.

You are not required to file Form 990, Return of Organization Exempt From Income Tax, if your gross receipts each year are normally \$25,000 or less. If you receive a Form 990 package in the mail, simply attach the label provided, check the box in the heading to indicate that your annual gross receipts are normally \$25,000 or less, and sign the return. Because you will be treated as a public charity for return filing purposes during your entire advance ruling

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THE YAMHILL COUNTY HOUSING

period, you should file Form 990 for each year in your advance ruling period that you exceed the \$25,000 filing threshold even if your sources of support do not satisfy the public support test specified in the heading of this letter.

If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. A penalty of \$20 a day is charged when a return is filed late, unless there is reasonable cause for the delay. However, the maximum penalty charged cannot exceed \$10,000 or 5 percent of your gross receipts for the year, whichever is less. For organizations with gross receipts exceeding \$1,000,000 in any year, the penalty is \$100 per day per return, unless there is reasonable cause for the delay. The maximum penalty for an organization with gross receipts exceeding \$1,000,000 shall not exceed \$50,000. This penalty may also be charged if a return is not complete. So, please be sure your return is complete before you file it.

You are not required to file federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T, Exempt Organization Business Income Tax Return. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You are required to make your annual information return, Form 990 or Form 990-EZ, available for public inspection for three years after the later of the due date of the return or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and your exemption letter. Copies of these documents are also required to be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 557, Tax-Exempt Status for Your Organization, or you may call our toll free number shown above.

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, we will assign a number to you and advise you of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

If we said in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help us resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

Letter 1045 (DO/CG)

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-4-

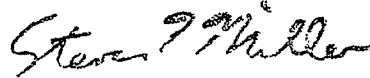
MAY 23 2002

THE YAMHILL COUNTY HOUSING

HOUSING AUTHORITY
OF YAMHILL COUNTY

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,



Steven T. Miller
Director, Exempt Organizations

Enclosure(s):
Form 872-C

Letter 1045 (DO/CG)

OGDEN UT 84201-0046

In reply refer to: 0424160535
Jan. 26, 2004 LTR 252C
93-1327751 000000 00 000

03334

BODC: TE

YAMHILL COUNTY AFFORDABLE HOUSING
CORPORATION
PO BOX 865
MCMINNVILLE OR 97128

Taxpayer Identification Number: 93-1327751

Dear Taxpayer:

Thank you for the inquiry dated Nov. 19, 2003.

We have changed your business name as requested. The number shown above is valid for use on all tax documents. For your convenience, we have ordered corrected Forms 8109, Federal Tax Deposit Coupons for you to make your deposit. You should receive them in five to six weeks. REMINDER - Your new business name should also be used if you deposit electronically. You can make Electronic Funds Transfer (EFT) payments using the government's Electronic Federal Tax Payment System (EFTPS) through a financial agent designated to process tax payments.

If you have any questions, please call us toll free at 1-877-829-5500 between the hours of 8:00 a.m. and 6:30 p.m., Eastern Time.

If you prefer, you may write to us at the address shown at the top of the first page of this letter.

Whenever you write, please include this letter and, in the spaces below, give us your telephone number with the hours we can reach you. Also, you may want to keep a copy of this letter for your records.

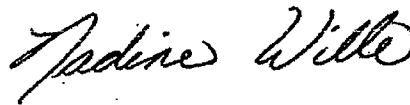
Telephone Number () _____ Hours _____

0424160535
Jan. 26, 2004 LTR 252C
93-1327751 000000 00 000
03335

YAMHILL COUNTY AFFORDABLE HOUSING
CORPORATION
PO BOX 865
MCMINNVILLE OR 97128

Thank you for your cooperation.

Sincerely yours,



Nadine Wille
Dept. Manager, Code & Edit/Entity 3

Enclosure(s):
Copy of this letter

Attachment B

YAMHILL COUNTY AFFORDABLE HOUSING CORPORATION FISCAL YEAR-TO-DATE AS OF JANUARY 2024

YCAHC	CASH	UNDISBURSED OBLIGATIONS	AVAILABLE FUNDS	RECEIVABLES	
HOUSING REHABILITATION					
DE-FEDERALIZED FUNDS 650	\$607,323	(\$114,572)	\$492,752	\$2,589,029	
VA REVOLVING 655	\$33,336	\$0	\$33,336	\$41,663	
1994 AMITY 694	\$12,500	\$0	\$12,500	\$19,231	
1995 DAYTON 695	\$0	\$0	\$0	\$10,000	
1996 YAMHILL COUNTY 696	\$0	\$0	\$0	\$11,479	
1997 CITY OF MCM 697	\$52,717	\$0	\$52,717	\$28,096	
1999 YAMHILL COUNTY 698	\$9,854	\$0	\$9,854	\$96,521	
2021 NEWBERG 610	(\$75,990)	\$0	(\$75,990)	\$95,955	
SUBTOTAL	\$639,741	(\$114,572)	\$525,169	\$2,891,973	\$3,417,143
HOUSING RESOURCE CENTER					
OHCS GRANT FUNDS	\$49,720	\$0	\$49,720	\$0	
	\$49,720	\$0	\$49,720	\$0	\$49,720
HOMEOWNERSHIP					
HOMEOWNERSHIP FUNDS	\$451,284	\$0	\$451,284	\$63,941	
	\$451,284	\$0	\$451,284	\$63,941	\$515,224
TOTAL FUNDS	\$1,140,744	(\$114,572)	\$1,026,173	\$2,955,914	\$3,982,086

Attachment C

2023 INCOME LIMITS for HCV (Published 5/15/23)

# in Household	Extremely Low	Very Low (50%)	Low Income (80%)
1	23,700	39,500	63,150
2	27,100	45,150	72,200
3	30,500	50,800	81,200
4	33,850	56,400	90,200
5	36,600	60,950	97,450
6	40,280	65,450	104,650
7	45,420	69,950	111,850
8	50,560	74,450	119,100

Attachment D



Return to:
Mark Irving
503-435-8324
mirving@hayc.org

**Yamhill County Affordable Housing Corporation (YCAHC)
Housing Rehabilitation Grant Application**

INSTRUCTIONS: Please use blue or black ink. Please fill out all information requested leaving no blanks. Please provide copies of additional documents as requested on the cover letter. Return form to **135 NE Dunn Place, McMinnville, OR 97128.**

HOUSEHOLD COMPOSITION – list all persons living in your household. For additional household members, please use a separate page.

NAME: First, Middle Initial, Last	Social Security Number	Relation To Homeowner	Date of Birth	Age	Sex	Race *	Ethnicity **
		Owner					
		Co-Owner					

*Enter 1-White 2-Black/African American 3-Asian 4-American Indian or Alaskan Native 5-Native Hawaiian or Pacific Islander 6-American Indian or Alaskan Native & White 7-Asian & White 8-Black/African American & White 9-American Indian or Alaska Native & Black/African American 10-Other Multi Racial

**Enter 1-Non Hispanic 2-Hispanic

Property Address: _____

Mailing Address: _____

Phone Number: _____

Email: _____

For the children listed above, do you have legal custody at least 51% of the time or more? Yes No

PROPERTY INFORMATION

Tax Account #(s): _____ Market Value: _____

Year Built: _____ Year Purchased: _____ Purchase Price: _____

Bedroom(s): _____ Bath(s): _____ Total Sq Ft: _____

INCOME

EMPLOYMENT / SELF EMPLOYMENT

Please submit 30 days worth of paystubs

Family Member: _____ Employer: _____

Employer's Address: _____

Employer's Phone #: _____ Annual Salary: _____ Date Employed: _____

Family Member: _____ Employer: _____

Employer's Address: _____

Employer's Phone #: _____ Annual Salary: _____ Date Employed: _____

OTHER INCOME

ALL "YES NO" QUESTIONS MUST BE ANSWERED

For all items marked "yes", you must provide a copy of the current statement of income.

Income	Do you have?	Family Member	How much?	Per? (Month, Week, etc)
Social Security	Yes No		\$	
SSI	Yes No		\$	
Pension	Yes No		\$	
Unemployment	Yes No		\$	
Child Support	Yes No		\$ \$ \$	Case # Case # Case #
Military Pay	Yes No		\$	
Other	Yes No		\$	

ASSETS

ALL "YES NO" QUESTIONS MUST BE ANSWERED

For all items marked "yes", you must provide a copy of the current statement.

Type of Asset	Circle	Household Member(s)	Name and Mailing Address of Company	Value or Balance
Checking	Yes No			
Checking	Yes No			
Savings / Certificate of Deposit	Yes No			
Savings / Certificate of Deposit	Yes No			
Stocks/Bonds/ Annuities/ Money Market	Yes No			
IRA/KEOGH/ Retirement/Trust (List Available Amounts Only)	Yes No			
Permanent, Whole, or Universal Life Insurance (List Cash Value Only)	Yes No			
Other (Please specify):	Yes No			

List all automobiles, recreational vehicles, boats, and similar items owned by all members of your household and the current values.

Make / Model / Year	Value

Does any household member own any other real estate or rental property? Yes No
If yes, explain what type of property, and how much income is received monthly. A copy of most recent property tax statement and proof of rental income is required. _____

REASONABLE ACCOMODATIONS: If you or anyone in your family is a person with disabilities, and you require a specific accommodation in order to fully utilize our programs and services, please contact Mark Irving at 503-883-4324.

SIGNATURES: Please have all persons who are over 18 in the household sign below. By signing, you are certifying:

that all information in this application, and all information furnished in support of this application is given for the purpose of obtaining a housing rehabilitation grant, under a financial assistance program developed by the lender with funds provided under the Housing and Community Development Act of 1974, as amended, and is true and complete to the best of the applicants' knowledge and belief.

The applicant further certifies that s/he is now the owner of the manufactured home described in this application and that the rehabilitation grant proceeds will be used only for work and materials allowable under and authorized by the housing rehabilitation grant program for the property described in this application. If the approving officer determines that the rehabilitation grant proceeds will not or cannot be used for the purposes described herein, the applicant acknowledges that s/he shall have no further interest, right, or claim to the grant proceeds.

The applicant covenants and agrees that s/he will comply with all requirements imposed by or pursuant to regulations of the Secretary of Housing and Urban Development effectuating Title VI of the Civil Rights Act of 1974 (78 Stat.252).

Verification of any of the information contained in this application may be obtained from any source named herein.

Owner expressly agrees to indemnify the Housing Authority of Yamhill County and the Yamhill County Affordable Housing Corporation and to hold them harmless from any and all lawful claims resulting from false or fraudulent statements, errors, omissions, representations, or documents submitted with this application.

Penalty for false or fraudulent statement:

U.S.C. Title 18 Sec. 1001 provides:

Whoever, in any matter within the jurisdiction of any department or agency of the United States knowingly and willfully falsifies, or makes false, fictitious or fraudulent statements or representation, or makes or uses any false writing or documents knowing the same to contain any false, fictitious or fraudulent statement or entry, shall be fined not more than \$10,000 or imprisoned not more than five years, or both.

Homeowner: _____ Date: _____

Homeowner/Other Occupant: _____ Date: _____

AUTHORIZATION FOR RELEASE OF INFORMATION / AUTORIZACION POR DESCARGO DE INFORMACION

PURPOSE: The Housing Authority of Yamhill County uses this authorization and the information obtained with it to administer and enforce housing program rules and policies. / **PROPOSITO:** La Autoridad de Vivienda del Condado de Yamhill usa esta autorización y la información que esta adentro para obtener, administrar y poner en vigor reglas de la programa de la vivienda y normas.

INDIVIDUALS OR ORGANIZATIONS REQUESTED TO RELEASE INFORMATION: (Any of the following individual organizations including any governmental organizations, may be asked to release information.)

INDIVIDUOS O ORGANIZACIONES QUE NOS PUEDE DAR INFORMACION: (Cualquieras de las siguientes organizaciones individuales incluyendo cualquieras organizaciones gubernamentales.)

- ❖ **Post Offices / Oficinas del correo**
- ❖ **Utility Companies / Compañías de la utilidad**
- ❖ **Employers, Past & Present / Patrones, Pasado y Presente**
- ❖ **Credit Bureaus / Agencias del crédito**
- ❖ **Schools and Colleges / Escuelas y Universidades**
- ❖ **U.S. Soc. Sec. Admin. / Admin. del seguro social/Professional Personal References/Referencias Profesionales y Personales**
- ❖ **U.S. Department of Veterans Affairs / U.S. Sección de Asuntos de los Veteranos**
- ❖ **Current & Previous Landlords (including Public Housing Agencies) / Dueños del Presente y pasados (incluyendo Agencias de las Viviendas Públicas)**
- ❖ **Courts & Law Enforcement Agencies / Corte y Agencias del entrada en vigor de la Ley**
- ❖ **Banks and Other Financial Institutions / Bancos y Otro Instituciones Financieras**
- ❖ **State Agencies such as Welfare & Social Services / Agencias del estado como Welfare y Servicios Sociales**
- ❖ **Providers of: Alimony, Childcare, Child Support, Credit Handicapped Assistance, Medical Care, Prescriptions, Pensions/Annuities**
- ❖ **Provedores de: Pensión por divorcio, Cuida de Niño, Mantener de Niño, Ayuda Invalido, Aflicción Médica, Pensiones/ anualidades**

INFORMATION COVERED - Information shared may include: / INFORMACION CUBRIO - Información compartido incluía:

- ❖ **Family Composition / Composición familiar**
- ❖ **Criminal Activity, Legal Issues / Actividades criminales, ilegales**
- ❖ **Child Care Expenses / Gastos de Cuida de Niño**
- ❖ **Soc. Sec. Numbers / Numeros de Seguros Sociales**
- ❖ **Identity and Marital Status / Identidad y Estado de matrimonio**
- ❖ **Handicapped Assistance Expenses / Gastos de la Ayuda de Impedidos**
- ❖ **Employment, Income, Pensions and Assets / Empleo, Ingreso, Pensiones y posesiones**
- ❖ **Credit History, Financial Concerns / Historia del crédito, Preocupaciones Financieros**
- ❖ **Federal State, Tribal or Local Benefits / Beneficios Tribales o Beneficios Locales, del Estado, o federal**
- ❖ **Medical, Psychological, or Psychiatric Issues and records, Out of Pocket Prescription Costs / Emisiones de tipos Médicas, Psicológicos, o Psiquiátricos**
- ❖ **Residences and Rental History / Residencia y historia de renta**

AUTHORIZATION / AUTORIZACION

◆ I authorize the release of any information (including documentation and other materials) pertinent to eligibility for or participation in the Housing Rehabilitation Program. / Yo autorizo el descargo de cualquier información (incluyendo documentación y otro materiales) pertinente a elegibilidad por o participación en el programa de rehabilitación para viviendas.

◆ I understand that this authorization cannot be used to obtain any information about me that is not pertinent to my eligibility for and continued participation in the Housing Rehabilitation Program. / Yo entiendo que no se puede usar para obtener cualquier información acerca de mí con esta autorización que no es pertinente a mi elegibilidad por y participación continuada en el programa de rehabilitación para viviendas.

◆ I agree that photocopies of this authorization may be used for the purposes stated above. This authorization will stay in effect for fifteen months from the date signed. / Yo estoy de acuerdo que se usan fotocopias de esta autorización por los propósitos declaró sobre. Esta autorización quedará en efecto por quince meses de la fecha firmó.

Signature/Head / Firma/Cabeza

Date/Fecha

SS#/# de Seguro Social

**Signature/Spouse/Other Occupant
Firma/Esposa/Otro Ocupante**

Date/Fecha

SS#/# de Seguro Social

Attachment E

HOUSING REHABILITATION PROGRAM CONSTRUCTION CONTRACT

THIS AGREEMENT, effective the date of the final signature, by and between Newberg Homeowner hereinafter called Owner, and Contractor Name hereinafter called Contractor.

Owner acknowledges that the Owner procured this contract, and that the Owner has assumed responsibility for the procurement of the Contractor by selecting the Contractor and negotiating the price;

That the Owner is responsible for enforcing the provisions of and satisfactory performance of the Contract except to the extent that the responsibility for enforcement of the contract provisions and performance is expressly granted to **Yamhill County Affordable Housing Corporation** (hereinafter called the Grantor), or its agent the **Housing Authority of Yamhill County**;

That Owner and Contractor, for the consideration stated hereinafter in this contract, agree as follows:

Source of Funds:

Work under this contract will be funded with TBD

Conflict of Interest:

No employee, agent, consultant, officer, elected official or appointed official of the **City of Newberg** or any of its sub-recipients (sub-grantees) receiving funds who exercise or have exercised any functions or responsibilities with respect to grant activities who are in a position to participate in a decision making process or gain inside information with regard to such activities, may obtain a financial interest or benefit from the activity or have an interest or benefit from the activity or have an interest in any contract, subcontract or agreement with respect thereto, or the proceeds there under, either for themselves or those with whom that have family or business ties, during their tenure or for one year thereafter, in accordance with 24 CFR Part 570.489(h).

Permits:

The Contractor is required to obtain all necessary permits. Payments will not be authorized unless a copy of the final approved inspection is provided.

ARTICLE 1: SCOPE OF WORK

This Contract consists of the following documents, all attached hereto and incorporated herein:

1. The Contract and any subsequent Change Orders
2. The Work Write Up and Bid Form/Contractor's Bid
3. The Estimate/Bid Form, specifications, and drawings (when applicable)
4. General Conditions
5. Performance Requirements and Standards for Rehabilitation Contracts
6. Consumer Protection Notice
7. Information Notice to Homeowners About Construction Liens
8. Notice of Procedure

In connection with the property to be rehabilitated, located at Newberg, OR 97132, Contractor shall furnish all materials, perform all work, pay for all permits, and comply with all the terms and conditions as provided in the above documents. All work completed under this contract must be completed using the most energy efficient measures possible.

ARTICLE 2: CONSIDERATION

In consideration of Contractor's satisfactory completion of the Contract, Grantor shall pay the Contractors the sum of \$\$\$.

ARTICLE 3: NOTICE TO PROCEED AND STATEMENT OF NONCOLLUSION

Your bid proposal, submitted to perform work at the above property has been reviewed and accepted. You are authorized by the undersigned property owner(s) to commence work on the day of TBD 2024 work shall be completed on or before the day of TBD, in accordance with the terms and conditions of the Construction Contract.

The undersigned parties certifies that:

- A. The total contract price is for only those items listed on the work write-up, and none other.
- B. There has not been, and will not be, any kickback, credit or other similar payment in any form made to the owner or to any other person.
- C. No credit or payment of any kind will be made to the owner or to members of the owner's household on subject property.

ARTICLE 4: CONTRACTOR'S REPRESENTATIONS - INSURANCE AND REGISTRATION

Contractor acknowledges that he/she will file a certificate showing coverage of at least \$100,000 liability insurance and Workman's Compensation Insurance with the Grantor or its authorized agent prior to the date of commencement of work pursuant to this Contract.

Contractor further affirms that he/she is currently registered as a Residential Contractor by the State of Oregon, Construction Contractors Board, and that any subcontractors doing work will be currently registered by the State of Oregon, Construction Contractors Board.

ARTICLE 5: CONTRACTOR'S WARRANTY AND LIEN WAIVER

Contractor hereby warrants all work performed under this contract to be free of defects in workmanship or material for a period of one year from the date of completion. This warranty covers all work done under this Contract but does not apply to those items that become deficient after the work is completed, due to abuse or neglect on the part of the Owner. Contractor further warrants all materials will be installed per manufactures specifications and contractor will furnish Owner with all manufacturer's and supplier's written guarantees and warranties covering materials and equipment furnished under this Contract.

Contractor hereby agrees to waive, any lien or right to lien, which the Contractor may have against the property; and to hold Owner harmless from any liens arising out of the rehabilitation work done under this agreement. Contractor agrees to notify all the subcontractors working on this rehabilitation project of this provision.

ARTICLE 6: SECTION 3 OF THE HOUSING AND COMMUNITY DEVELOPMENT ACT

Section 3 - Economic Opportunities for Low- and Very Low-Income Persons (This clause is applicable only if the Grant exceeds \$200,000 and the construction contract exceeds \$100,000, or a contractor has an aggregate of contracts for this project that exceeds \$100,000.)

- A. The work to be performed under this contract is subject to the requirements of Section 3 of the Housing and Urban Development Act of 1968, as amended, 12 U.S.C. 1701u (Section 3). The purpose of Section 3 is to ensure that employment and other economic opportunities generated by HUD assistance or HUD-assisted projects covered by Section 3 shall, to the greatest extent feasible, be directed to low- and very low-income persons, particularly persons who are recipients of HUD assistance for housing.

- B. The parties to this contract agree to comply with HUD's regulations in 24 CFR part 135, which implement Section 3. As evidenced by their execution of this contract, the parties to this contract certify that they are under no contractual or other impediment that would prevent them from complying with the part 135 regulations.
- C. The contractor agrees to send to each labor organization or representative of workers with which the contractor has a collective bargaining agreement or other understanding, if any, a notice advising the labor organization or workers' representative of the contractor's commitments under this Section 3 clause, and will post copies of the notice in conspicuous places at the work site where both employees and applicants for training and employment positions can see the notice. The notice shall describe the Section 3 preference, shall set forth minimum number and job titles subject to hire, availability of apprenticeship and training positions, the qualifications for each; and the name and location of the person(s) taking applications for each of the positions; and the anticipated date the work shall begin.
- D. The contractor agrees to include this Section 3 clause in every subcontract subject to compliance with regulations in 24 CFR part 135, and agrees to take appropriate action, as provided in an applicable provision of the subcontract or in this Section 3 clause, upon a finding that the subcontractor is in violation of the regulations in 24 CFR part 135. The contractor will not subcontract with any subcontractor where the contractor has notice or knowledge that the subcontractor has been in violation of the regulations in 24 CFR part 135.
- E. The contractor will certify that any vacant employment positions, including training positions, that are filled (1) after the contractor is selected but before the contract is executed, and (2) with persons other than those to whom the regulations in 24 CFR part 135 require employment opportunities to be directed, were not filled to circumvent the contractor's obligations under 24 CFR part 135.
- F. Noncompliance with HUD's regulations in 24 CFR part 135 may result in sanctions, termination of this contract for default, and debarment or suspension from future HUD-assisted contracts.
- G. Contractor shall complete the required Section 3 report form 60002, included as Exhibit 5C of the CDBG Grant Management Handbook and submit the completed form to the city/county grant recipient with the final construction pay estimate for the project.

ARTICLE 7: MINORITY, WOMEN AND EMERGING SMALL BUSINESS

Before the final payment to Contractor is made, Contractor shall submit the enclosed Section 3 and Minority, Women and Emerging Small Business form.

ARTICLE 8: PROGRESS PAYMENTS

Progress Payments will not be allowed under this contract.

ARTICLE 9: NOTIFICATION OF COMPLETION, ACCEPTANCE AND FINAL PAYMENT

Upon completion of work, Contractor shall notify the Grantor, and shall request in such notice that the Housing Rehabilitation Specialist make a final inspection of the job. Thereafter, if the inspector finds that the work has been satisfactorily completed in accordance with the Contract, the entire balance owed to Contractor shall become due and shall be paid in accordance with the Accounts Payable Purchase Order Schedule subject to written acceptance by Owner.

ARTICLE 10: SUBSTANTIAL COMPLETION

If, after the work has been substantially completed, full completion thereof is materially delayed through no fault of Contractor, and that the Housing Rehabilitation Specialist so certifies, payment of the

balance due for that portion of the work fully completed and accepted by Owner shall be made to Contractor, without terminating the contract. Such payment shall be made under the terms and conditions governing final payment, except that it shall not constitute a waiver of claims by the parties.

ARTICLE 11: OWNER'S AGREEMENT

Owner will permit the Contractor to use, at no cost, existing facilities such as lights, heat, power, and water necessary to carrying out and completion of the work. Owner will cooperate with the Contractor to facilitate the performance of the work, including the removal and replacement of rugs, coverings, and furniture necessary. Owner shall maintain an uncluttered and safe area for the contractors to work in, including securing all pets during the working hours.

ARTICLE 12: LEAD-BASED PAINT

The use of lead-based paint on any interior or exterior surfaces is prohibited. OWNER certifies that Owner has received & reviewed the pamphlet *"Protect Your Family From Lead In Your Home"* and *"Renovate Right"* containing information concerning removal or control of lead-based paint. The use of lead-based paint on any interior or exterior surface is prohibited. For Lead Based Paint Abatement or Interim Controls Contracts, Owner is responsible for assuring completion, prior to construction, of a Risk Assessment for lead-based paint; for reviewing the Risk Assessment Report issued by the inspector; for reviewing and confirming the Clearance Report received upon completion of the work, and for payment of initial Clearance Testing fees incurred. Owner additionally understands that painters and contractors must have a current Lead Based Paint Renovators license prior to disturbing or removing paint on pre-1978 residential properties. Where paint removal or disturbance is taking place, Owner's Contractor must post a warning sign visible from thirty feet, which advises the public of "POSSIBLE LEAD-BASED PAINT HAZARDS".

Contractor agrees and covenants that Contractor will not use prohibited work practices, and that Contractor will abide by the provisions of Oregon Administrative Rule 333-069 and all other applicable laws, rules and regulations relating to the lead-based paint work, including obtaining Lead-Safe Work Practices Certification, or using workers with Lead-Safe Work Practices Certification.

ARTICLE 13: WAIVER

The failure of Owner to enforce, at any time, any of the provisions of this agreement, or Owner's failure to require, at any time, performance by Contractor of any of the provisions hereof, shall in no way be construed to be a waiver of such provisions, nor in any way to affect the validity of this Contract or any part thereof, or the right of Owner to thereafter enforce each and every such provision.

ARTICLE 14: SEVERABILITY

It is agreed by the parties that if any part, term or provision of this Contract is held by the Courts to be illegal or in conflict with any law of this state or the federal government, the validity of the remaining portions or provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the Contract did not contain the particular part, term or provision held to be invalid.

ARTICLE 15: MODIFICATION

There may be no modification of this Contract except by the written agreement of the parties herein, subject to the approval of the Grantor, which approval shall not be unreasonably withheld.

ARTICLE 16: HOLD HARMLESS

The Grantor is acting as technical advisor and is in no way a party to the contractual agreements between the Owner and Contractor. The Grantor is not responsible for any default of any condition by either of the parties to said agreements. Each party to this contract agrees to hold harmless the Grantor for all claims asserted against it arising out of this contract. Contractor expressly agrees to indemnify the Grantor and to hold it harmless from all lawful claims arising from injuries to persons or damage to

property resulting, or claimed to have resulted from, or as a result of, the operation of Contractor under this Contract.

ARTICLE 17: ACCESS TO RECORDS

Yamhill County, the State of Oregon, the U.S Department of Housing and Urban Development, the Comptroller General of the United States, or any of their duly authorized representatives, shall have access to any books, documents, papers, and records of the Contractor which are directly pertinent to this specific contract, for the purpose of making audit, examination, excerpts, and transcriptions. The Contractor must maintain all required records for three years after grantee makes final payments and all other pending matters are closed.

ARTICLE 18: ASBESTOS

Work must be done in accordance with DEQ Guidance regarding asbestos and as outlined in OAR 340, Division 248. Include all costs for asbestos surveys and testing. Test for asbestos at beginning of project. If abatement is necessary, stop all work and contact the Rehabilitation Specialist immediately to determine if changes need to be made to the scope of work. Submit a copy of all test results with your invoices. An Asbestos Certification will need to be completed prior to final payment.

IN WITNESS WHEREOF the parties hereto have executed this Contract the day and year first above written.

Company Name

Homeowner Name

Contractor Name

Address

CCB #

Newberg, OR 97132

City, State, Zip

Address

Phone

City, State, Zip

Homeowner Signature

Phone

Date

Contractor Signature

Date

Grantor's Agent

By: _____

Mailing Address	City	State	Zip	AMI	App Date and Time	Year Built	# Health
2902 E 2nd Street #82	Newberg	OR	97132	50%	11/16/20 0:00	1976	
2901 E 2nd St #126	Newberg	OR	97132	30%	7/7/20 0:00	1977	
2902 E 2nd St #42	Newberg	OR	97132	80%	5/12/16 0:00	1977	2
2901 E 2nd St #102	Newberg	OR	97132	50%	7/16/20 0:00	1977	2
301 E Columbia Dr #22	Newberg	OR	97132	50%	6/28/23 0:00	1990	
1103 N Springbrook Rd #33	Newberg	OR	97132	30%	7/9/20 0:00	1976	1
511 S Center St	Newberg	OR	97132	50%	5/7/22 0:00	1953	
301 E Columbia Drive #34	Newberg	OR	97132	80%	8/16/21 0:00	1990	
2902 E 2nd Street #44	Newberg	OR	97132	30%	7/7/20 0:00	1969	
301 E Columbia Dr #41	Newberg	OR	97132	50%	10/17/23 0:00	1993	
2902 E 2nd St #18	Newberg	OR	97132	50%	5/19/16 0:00	1973	2
409 E Pinehurst Drive	Newberg	OR	97132	30%	4/12/21 0:00	1976	
2901 E 2nd St #62	Newberg	OR	97132	30%	9/5/23 0:00	1978	
2901 E 2nd St #130	Newberg	OR	97132	30%	6/13/16 0:00	1976	3
2902 E 2nd Street #50	Newberg	OR	97132	30%	5/21/20 0:00	1971	2
2901 E 2nd St #3	Newberg	OR	97132	50%	10/3/16 0:00	1975	1
2901 E 2nd St #50	Newberg	OR	97132	50%	10/2/23 0:00	1978	2
2902 E 2nd St #65	Newberg	OR	97132	80%	7/8/20 0:00	1976	
2901 E 2nd Street #107	Newberg	OR	97132	30%	6/17/15 0:00	1972	2
1103 N Springbrook Rd #48	Newberg	OR	97132	50%	8/27/20 0:00	1973	
1103 N Springbrook Rd #38	Newberg	OR	97132	50%	5/25/16 0:00	1973	3
2902 E 2nd St #75	Newberg	OR	97132	30%	3/10/21 0:00	1974	
501 E Illinois Street #5	Newberg	OR	97132	30%	5/23/16 0:00	1972	2
301 E Columbia Dr #41	Newberg	OR	97132	50%	7/18/23 0:00	6/12/1905	
301 Columbia Dr #70	Newberg	OR	97132	50%	5/4/23 0:00	1990	1
2901 E 2nd Street #109	Newberg	OR	97132	30%	4/14/16 0:00	1976	2
1103 N Springbrook Rd #21	Newberg	OR	97132	30%	5/9/16 0:00	1973	1
2902 E 2nd Street #96	Newberg	OR	97132	30%	2/17/22 0:00	1973	2
2901 E 2nd St #73	Newberg	OR	97132	50%	8/13/20 0:00	1977	1
2902 E 2nd St #18	Newberg	OR	97132	30%	5/11/23 0:00	1971	2
2902 E 2nd St #74	Newberg	OR	97132	50%	5/9/16 0:00	1972	1
2902 E 2nd Street #32	Newberg	OR	97132	50%	3/4/19 0:00	1971	1
1531 East 3rd St	Newberg	OR	97132	30%	3/31/23 0:00	1992	3
2901 E 2nd St #1	Newberg	OR	97132	30%	6/22/16 0:00	1977	3
2901 E 2nd St #47	Newberg	OR	97132	30%	7/24/23 0:00	1979	3

Mailing Address	City	State	Zip	AMI	App Date and Time	Year Built	# Health
2902 E 2nd Street #32	Newberg	OR	97132	30%	8/24/20 0:00	1973	1
501 E Illinois St #9	Newberg	OR	97132	30%	6/1/16 0:00	1966	2
300 E Everest Rd #32	Newberg	OR	97132	50%	8/17/20 0:00	1974	1
2901 E 2nd Street #20	Newberg	OR	97132	50%	5/1/23 0:00	1977	1
1500 S Sandoz Rd #25	Newberg	OR	97132	30%	8/17/20 0:00	1996	
2901 E 2nd Street #18	Newberg	OR	97132	30%	10/21/23 0:00	1978	
1103 N Springbrook Rd #39	Newberg	OR	97132	50%	3/1/17 0:00	1974	
301 E Columbia Dr #30	Newberg	OR	97132	50%	3/13/23 0:00	1988	1
2901 E 2nd St #72	Newberg	OR	97132	50%	7/20/23 0:00	1979	3
2901 E 2nd St #42	Newberg	OR	97132	30%	5/2/16 0:00	1972	2
2902 E 2nd St #64	Newberg	OR	97132	30%	5/11/23 0:00	1971	2
1103 N Springbrook Rd #29	Newberg	OR	97132	50%	6/27/23 0:00	2003	1
708 E Dartmouth St	Newberg	OR	97132	80%	11/27/23 0:00	1985	3
2902 E 2nd St #104	Newberg	OR	97132	80%	5/11/23 0:00	1975	4
214 S Church St	Newberg	OR	97132	50%	4/17/23 0:00	1904	3
1000 S McKern Court #10	Newberg	OR	97132	80%	1/2/22 0:00	1996	
2902 E 2nd St #63	Newberg	OR	97132	50%	10/2/17 0:00	1977	1
2902 E 2nd Street #57	Newberg	OR	97132	50%	4/18/19 0:00	1971	2
2902 E 2nd St #79	Newberg	OR	97132	50%	7/9/20 0:00	1974	
301 E Columbia Dr #65	Newberg	OR	97132	50%	3/28/23 0:00	2005	
1103 N Springbrook Rd #25	Newberg	OR	97132	30%	4/17/19 0:00	1974	1
11125 NE Hurleys Lane	Newberg	OR	97132	50%	11/17/2023 6:22	1950	
301 E Columbia Dr #64	Newberg	OR	97132	80%	1/23/2024	6/21/1905	
2901 E 2nd Street #124	Newberg	OR	97132	30%	5/2/16 0:00	1973	2
501 Harrison St	Newberg	OR	97132	80%	3/20/23 0:00	1951	
904 S Chehalem St	Newberg	OR	97132	30%	11/30/22 0:00	1910	1
2901 E 2nd Street #43	Newberg	OR	97132	30%	3/29/19 0:00	1976	1
2902 E 2nd St #70	Newberg	OR	97132	50%	5/11/23 0:00	1974	2
2901 E 2nd Street #120	Newberg	OR	97132	30%	7/7/20 0:00	1972	
205 W 9th St	Newberg	OR	97132	30%	8/17/23 0:00	1980	2
1500 S Sandoz Rd #17	Newberg	OR	97132	30%	12/28/23 0:00	1995	1
108 E 9th St	Newberg	OR	97132	30%	1/9/24 0:00	1984	2
1103 N Springbrook Rd #40	Newberg	OR	97132	30%	1/18/24 0:00	1976	1

Attachment 2.a

**CET Fund Application – Catholic Charities of Oregon, Edlen & Company and Community
Wellness Collective in partnership with Providence
Staff Evaluation**

ATTACHMENT A
Construction Excise Tax (CET) Fund
FY 2022-23 Competative 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 for a period of at least 60 years following the date of construction (threshold verification)*.	NA Doesn't mention duration of affordable housing in project description
2. The project is ready for implementation with documentation to demonstrate financial feasibility.	NA Program meets criteria
3. 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, review procurement requirements and limitations before obtaining a purchase option.	NA Program meets criteria
4. 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 Program meets criteria
5. The proposal demonstrates that the Construction Excise Tax (CET) Funds are the most appropriate funding source for the project. Provide a description of a financing gap that includes funding sources or demonstrates budget constraints that limit the ability to pay or finance projects.	NA Program meets criteria
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 Staff awards 10 points
8. The project provides deeply affordable housing for households earning less than 50% of the median family income.	Up to 10 points Staff awards 10 points
9. The project provides extremely affordable housing for households earning less than 30% of the median family income. Projects could include permanent supportive housing and/or transitional housing for families or individuals who are houseless.	Up to 5 points Staff awards 5 points
10. Project concepts and designs showing close proximity to schools, parks, commercial areas, public transportation, services and jobs, and demonstration of cost-effective sustainability and energy-efficiency measures.	Up to 10 points Staff awards 10 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 Staff awards 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 Staff awards 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 Staff awards 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 Staff awards 10 points
Total Potential Points	70

Staff awards 70 total points

Attachment 2.b

**CET Fund Application – Catholic Charities of Oregon, Edlen & Company and Community Wellness Collective in partnership with Providence
Application Materials**

Project Proposal

Newberg 2026

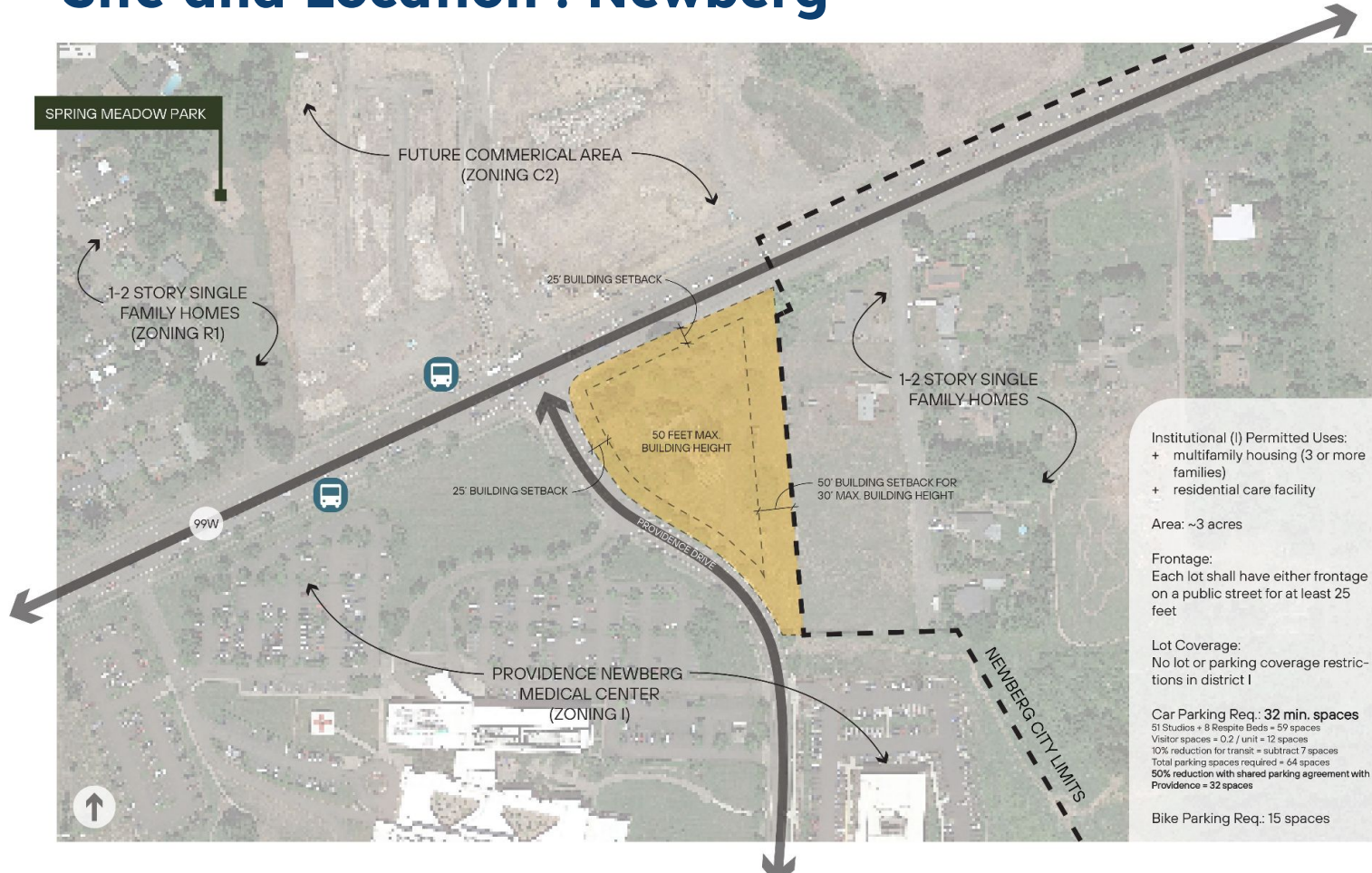
Newberg Part 1 will be a 40 unit PSH Project with 8 Recuperative beds, co-developed by Edlen & Co and Catholic Charities, owned and operated by Catholic Charities. Partners will include Community Wellness Collective, Providence, Unidos and others.

Providence will dedicate the land for this purpose.

Newberg Part 2 will be a 60 unit Affordable Housing or Workforce Housing Project, developed, owned and operated by Catholic Charities.



Site and Location : Newberg



Institutional (I) Permitted Uses:
+ multifamily housing (3 or more families)
+ residential care facility

Area: ~3 acres

Frontage:
Each lot shall have either frontage on a public street for at least 25 feet

Lot Coverage:
No lot or parking coverage restrictions in district I

Car Parking Req: 32 min. spaces
51 Studios + 8 Respite Beds = 59 spaces
Visitor spaces = 0.2 / unit = 12 spaces
10% reduction for transit = subtract 7 spaces
Total parking spaces required = 64 spaces
50% reduction with shared parking agreement with Providence = 32 spaces

Bike Parking Req.: 15 spaces

Part 1 : PSH and Recuperative Beds



Part 1 - PSH + Recuperative

Total Units: 40 PSH, 8 Recuperative

Project Team: Walsh Construction, Ankrom Moisan Architects, Guardian Property Management

Potential Partnerships:
 Community Wellness Collective
 Providence
 Unidos
 YCCO - Yamhill County
 HHS - Yamhill County

Unit Mix

Building	Studio (400 SF)	1 Br (500 SF)
PSH	37	3

Part 2 : Affordable



Part 2 - Affordable

Total Units: 60

Project Team: Walsh Construction,
Ankrom Moisan Architects, Guardian
Property Management

Unit Mix

Studio	1 BR	2BR	3BR
10	25	18	7

Funding Timeline/Sources

PART 1 - PSH + RECUPERATIVE

ANTICIPATED SCHEDULE

- April 2024 OHCS PSH Application Released
- May 2024 OHCS PSH Application Due
- August 2024 OHCS PSH Award Notification*
- July 2025 Closing/Start Construction
- July 2026 Completion
- June 2027 Lease-up Complete (5 units/month)

PROJECTED SOURCES

- \$14,340,000 - OHCS PSH Capital Funding and PSH Vouchers
 - If not awarded in 2024, re-apply following year and entire schedule shifts 12 months
- \$2,083,000 - Donations. \$400,000 committed
- Permanent Loan
- **Recuperative Shortfall: \$1,683,000**
- **PSH Shortfall: \$1,000,000**

PART 2 - AFFORDABLE OR WORKFORCE

ANTICIPATED SCHEDULE

- April 2025 Apply for OHCS LIFT/ 4% LIHTC Funds
- August 2025 OHCS LIFT/LIHTC Award Notification
- July 2026 Closing/Start Construction
- Sept. 2027 Completion
- January 2028 Lease-up Complete (15 units/month)

PROJECTED SOURCES

- \$15,631,563 - OHCS LIFT Loan
 - If not awarded in 2025, re-apply following year and entire schedule shifts 12 months
- \$11,227,949 Private Activity Bonds from OHCS.
- Other: 4% LIHTC and 45L Equity, Deferred and Contributed Developer Fee, Permanent Loan

Newberg Affordable Housing Commission and Newberg City Council,

Responses to CET Funding Questions:

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

Catholic Charities of Oregon (CCO) and Edlen & Co., partnered with Community Wellness Collective, and supported by Providence, plan to build a diverse housing solution for multiple populations experiencing housing insecurity. The project aims to meet a variety of housing needs and includes recuperative, permanent supportive, and workforce housing.

- **Recuperative Housing (10 beds):** supports individuals transitioning from medical services with acute recovery needs that are at risk of not healing without safe housing.
- **Permanent Supportive Housing (46 units):** supports households with chronic medical or behavioral health needs that are considered stable and controlled but need wrap around services to support their success in maintaining housing and aid in their continued recovery.
- **Workforce Housing (60 units):** for individuals or families 80% or below median family income (MFI) working within the Newberg-Dundee community.

CCO has built many affordable and permanent supportive housing units across Oregon but recognizes the importance of strong partnerships with local community-based organizations that have developed trust and relationship with the clients the project will serve. Through conversations, the decision was made to partner with Community Wellness Collective. CWC will be the service provider for the Permanent Supportive Housing (PSH) and Recuperative units, providing therapy, case management, peer support, and employment opportunities to clients. Catholic Charities will own the project and oversee the services provided by CWC.

Other potential partners to provide services as well as referrals include:

- Providence Medical Group
- Unidos
- Yamhill Community Care Organization (YCCO)
- HHS Mental Health

CCO and CWC believe that housing enables the ability for an individual to stabilize and/or recover from chronic, behavioral health, and substance use disorders. CWC's program HEART (housing, education, addiction, reintegration team), will provide the aids and tools for clients to safely transition to more long-term housing solutions, filling a very known gap in Yamhill County.

Providing 60-units of affordable workforce housing will provide many Newberg-Dundee employees the opportunity to live and work in the community.

Our shared goal is to help individuals facing housing insecurity to reintegrate into a vibrant community life. CWC and CCO acknowledge the challenges an individual experiencing chronic medical or behavioral health issues, addiction, or employment insecurity faces, especially while also navigating housing insecurity. A person's ability to thrive during and after the experience of significant social determinant of health challenges or discharge from an institution relies on the systems in place to provide accountability, support, and hope, which the partnership with CCO and CWC, as well as other local organizations, will provide.

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.

Scored Application Criteria:

- **CRITERIA:** The project provides new affordable housing, or new affordability, through retention or rehabilitation of existing housing, within the city.

RESPONSE:

New Housing:

- Recuperative: 10 beds
- Permanent Supportive Housing: 46 units
- Workforce Affordable: 60 units

- **CRITERIA:** The project provides deeply affordable housing for households earning less than 50% of the median family income.

RESPONSE: Permanent Supportive Housing Units (46) and Recuperative Housing Beds (10) will be for households earning less than 30% of MFI as they will be transitioning from homelessness.

- **CRITERIA:** The project provides extremely affordable housing for households earning less than 30% of the median family income. Projects could include permanent supportive housing and/or transitional housing for families or individuals who are houseless.

RESPONSE: Permanent Supportive Housing Units (46) and Recuperative Housing Beds (10) will be for households earning less than 30% of MFI as they will be transitioning from homelessness.

- **CRITERIA:** Project concepts and designs showing proximity to schools, parks, commercial areas, public transportation, services and jobs, and demonstration of cost-effective sustainability and energy-efficiency measures.

RESPONSE: The development resides on the current Providence parcel (see attachment for drawings), providing ample access to medical services. The Yamhill County Transit bus line runs in front of the proposed units, providing easy access to downtown Newberg. The location is within walking distance to multiple grocery stores including Fred Meyer, Safeway and Bi-Mart as well as multiple parks including Schaad and Spring Meadow. The elementary, middle school and high school are all within 1.5 miles of the site. The project will provide onsite case management, therapy, peer support and groups for all residents to access. CWC will continue its partnerships with the Newberg-Dundee faith-based community for food delivery to the Recuperative beds, including hot breakfasts and dinners daily.

Sustainability practices are embedded in the project's design such as LED and Energy Star lighting, Energy Star appliances, a high-efficiency hot water heating system, and a solar-ready electrical system and roof trusses. The project will pursue Earth Advantage certification.

- **CRITERIA:** 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.

RESPONSE: CWC has relationships with nearly all community and faith-based organizations in the Newberg-Dundee community serving those facing housing insecurity. CWC's volunteer base serves as the current failsafe structure for staffing the nightly emergency homeless shelter and day drop-in center. In addition to state PSH funding that will be applied for this spring, private donor relationships have been leveraged and inspired to invest in this project with \$500,000 committed thus far.

- **CRITERIA:** The project utilizes already existing resources in effective and innovative ways. The project shall not duplicate services provided by another organization.

RESPONSE: Essential to the development of this project to program are deep partnerships with local community and faith-based organizations that are already serving clients with social determinant of health insecurities. CCO seeks not to duplicate but uplift and support existing service providers leveraging their experience in Supportive and Affordable housing. CCO intends to act as the sponsoring organization, bringing best practices that have proven successful across the state to emerging community-based organizations like CWC and Unidos that have established trust with the clients in need.

- **CRITERIA:** 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.

RESPONSE:

This project will have the following partners:

Owner/Co Developer: Caritas Housing – Catholic Charities of Oregon

Developer: Edlen and Co

Services Partner: Community Wellness Collective

Other partners: Providence, Unidos

Catholic Charities of Oregon (CCO) was established in 1933 to address the needs of households impacted by the Great Depression and has continued this mission ever since, partnering with the most vulnerable, regardless of faith, to achieve lasting solutions to poverty and injustice. In 1998, CCO established a dedicated housing development and ownership entity, Caritas Housing, to address affordable housing needs across the state. This now includes more than 900 units of affordable housing across 23 properties statewide. Caritas Housing will be the owner of this project, leveraging CCO's experience in affordable and supportive housing.

CCO understands the dire need for more supportive housing for those experiencing chronic homelessness. In 2020, Catholic Charities launched its Healthy Housing Initiative with partners Providence Health & Services and the Archdiocese of Portland, aiming to leverage the expertise and resources of the three partners to reduce chronic homelessness throughout the Portland area. This includes a goal of developing at least 300 units of Permanent Supportive Housing (PSH) in the Metro area, which includes Newberg. This project will be a part of helping to meet this goal. CCO has recently completed the following two projects which are both similar to this project and has two PSH projects under construction which will open in Fall of 2024.

Chiles House: Located in Southeast Portland, Chiles House helps close a gaping hole in Portland's social safety net and fill a critical need for the growing number of Catholic Charities clients who find themselves homeless or at imminent risk. Chiles House offers 27 highly affordable apartments for whom rapid recovery from houselessness, or prevent of chronic houselessness, is paramount. This development was entirely privately financed allowing Caritas Housing to respond to the changing needs of our clients. The development is a four-story building featuring cross-laminated timber, trauma-informed design, and sustainable design elements, and is located next door to Catholic Charities headquarters allowing residents convenient access to the full suite of Catholic Charities service programs.

Good Shepherd Village: Upon completion in late 2023, Good Shepherd Village will be the first regulated affordable-housing development located within Happy Valley city limits and the largest development in Catholic Charities/Caritas Housing's portfolio. The 143-unit project provides much needed affordable housing, with over 55% of the units being family-sized and 58 units set-aside as Permanent Supportive Housing. This development is located in a high opportunity area with close proximity to public transit, grocery stores, schools, a public library, multiple parks, and healthcare resources. The project uses trauma-informed design, universal design, and sustainable design elements.

The Beacon at Glisan. Currently under construction, The Beacon is a partnership with Related Northwest and includes 41 studio units of new permanent supportive housing. All units are restricted at 30% AMI and have Project Based Vouchers (PBVs), ensuring that rents will be affordable for all residents. Supportive services will be provided on-site by Catholic Charities in partnership with the Native American Rehabilitation Association (NARA) and Cascadia Behavioral Health. In addition to the residential units, the project features on-site services and office space, a community room, a food pantry, ample bike parking, and laundry. The development incorporates trauma-informed design, universal design, and sustainable design elements. Funding sources include Portland Housing Bond, 4% Low LIHTCs, HTF, tax-exempt bonds, PBVs and Portland Clean Energy Fund.

Francis + Clare Place. Currently under construction, Francis + Clare Place is a partnership with Edlen and Co and includes 61 units of new permanent supportive housing with 54 studios and seven one-bedroom units. All units are restricted at 30% AMI and have Project Based Vouchers (PBVs), ensuring that rents will be affordable for all residents. Supportive services will be provided on-site by Catholic Charities in partnership with the Native American Rehabilitation Association (NARA). In addition to the residential units, the project features on-site services and office space, a multi-use classroom and community room, ample bike parking, and laundry. The development incorporates trauma-informed design, universal design, and sustainable design elements. Funding sources include Portland Housing Bond, 4% Low LIHTCs, tax-exempt bonds, PBVs and Portland Clean Energy Fund.

Edlen and Co.'s focus is on mission-driven real estate with an emphasis on affordable and middle-income housing development and preservation, public-private partnerships, and projects that further push the boundaries of sustainability. Edlen & Co.'s portfolio includes over 1,100 units of affordable housing completed, under construction and in predevelopment. All projects are done in partnership with one or more nonprofit partners. These projects serve low-wage workers and families as well as populations with special needs such as individuals and families in recovery, individuals with persistent mental illness, individuals with intellectual and developmental disabilities, and underserved populations.

Edlen & Co.'s affordable housing portfolio includes a track record of successful projects with similar size and scope to the Newberg project including four projects that include permanent supportive housing. Recent projects include:

Wynne Watts Commons. Completed in 2022 in partnership with Albertina Kerr Centers. Wynne Watts Commons includes 147 affordable housing units, with 24 studios, 92 one-bedroom units, 23 two-bedroom units, and eight three-bedroom units, with 30 of the units at 30% AMI, 102 units at 60% AMI and 15 units at 80% AMI. The 30 units at 30% AMI will be for residents with intellectual and developmental disabilities and will be fully integrated into the overall building and resident population. The project was funded with 4% LIHTCs, tax-exempt bonds, Metro Housing Bond Funds, HUD 811 Project Rental Assistance, OR-MEP and capital campaign funds. The project was designed to be net-zero energy and includes a community room and outdoor community space with a play area.

Aurora. Completed in 2023 in partnership with Our Just Future, Aurora serves those experiencing homelessness with on-site support, case management, employment resources, and clinical services. Of the 93 available units, 16 are Permanent Supportive Housing (PSH) units, 15 are set at 30% AMI, and 62 are set at 60% AMI. The Aurora includes 44 family-sized units. Amenity spaces include a community room, indoor and outdoor child play areas, onsite laundry and onsite resident services and behavioral health offices. Funding sources include Oregon Housing and Community Services (OHCS) Local Innovation and Fast Track (LIFT), 4% Low Income Housing Tax Credits (LIHTCs), tax-exempt bonds, Portland Housing Bond, Project Based Vouchers (PBVs) and capital campaign funds. The site is within .25 miles of light rail and has a full-service grocery store across the street.

D/M/W/ESB/SDVBE Experience and Commitment

Our project team is committed to supporting historically marginalized communities through our projects, and Edlen & Co., Walsh Construction Company, and Ankrom Moisan Architects all have consistent track records in meeting and exceeding D/M/W/ESB/SDVBE participation goals on past and current projects. Walsh has consistently high participation with D/M/W/ESB/SDVBE firms, who on average complete 34% of their subcontracted work. For this project, our target is at least 20% D/M/W/ESB/SDVBE participation.

Recent participation outcomes for Walsh include:

- Dahlke Manor 30% goal, 34% achieved
- Williams Plaza 30% goal, 32% achieved
- Medallion Apartments 20% goal, 29% achieved
- Wy'East Plaza 20% goal, 34% achieved
- The Louisa Flowers 20% goal, 31% achieved

- Meyer Memorial Trust 50% goal, 55% achieved
- NHA Campus 20% goal, 32% achieved
- St. Francis Park Apartments 20% goal, 36% achieved
- Argyle Gardens 20% goal, 30% achieved
- New Meadows 20% goal, 33% achieved

Recent participation outcomes for Edlen & Co include:

- Beatrice Morrow 20% goal, 29% achieved
 - LifeWorks NW + Beech Street Apartments 20% goal, 24% achieved
 - Hill Park Apartments 20% goal, 20% achieved
 - 38 Davis 20% goal, 26% achieved
 - The Nick Fish 30% goal, 28% achieved
 - Wynne Watts Commons 20% goal, 32% achieved
 - The Aurora 30%, goal, 30% achieved
- **CRITERIA:** The budget and timeline are thorough and realistic (evidence of construction and/ or service costs required with application).

RESPONSE:

A summary of the current estimated sources and uses for the project is as follows:

Uses	PSH	Recuperative	Total
Land	0	0	0
Target Guaranteed Maximum Price (GMP)	15,128,000	1,969,000	17,097,000
Other Hard Costs	429,000	81,000	510,000
Soft Costs	4,197,000	454,000	4,651,000
Operating Reserve & OHCS Fees	575,000	0	575,000
Contingency	909,000	119,000	1,028,000
Total	21,238,000	2,623,000	23,861,000

Sources	PSH	Respite	Total
Capital Campaign	377,000	2,623,000	3,000,000
PSH Capital Funding	20,861,000	0	20,861,000
Total	21,238,000	2,623,000	23,861,000

The total cost of the project includes the hard costs, permits and system development charges, architecture and engineer fees, other soft costs such as testing and inspection, insurance, and legal fees, 5% owner contingency, escalation contingency, an operating reserve, OHCS PSH

fees, and developer fee. The land will be donated by Providence thus there is no land cost. Hard costs were determined by the General Contractor based on concept plans and specifications. Soft costs were determined based on recent estimates from similar projects. The construction schedule was provided by the General Contractor.

The project team has participated in Oregon Housing and Community Service’s (OHCS’s) PSH institute, which is a pre-requisite to apply for PSH funding and will apply for PSH funding in Spring of 2024. Of the \$3 million capital campaign, \$500,000 has been committed to date.

Current projected schedule milestones are as follows:

- April 2024 OHCS PSH Application Released
- May 2024 OHCS PSH Application Due
- August 2024 OHCS PSH Award Notification*
- July 2025 Closing/Start Construction
- July 2026 Completion

- June 2027 Lease-up Complete (5 units/month)

Closing Financial Statement and Commitment:

This project combines both government and private funding, representing the support and sustainability of the development and programming. We have shared organizational commitment to Newberg-Dundee and are confident in our ability to close the budget gap over the next year to ensure viability. Support from The City of Newberg through the CET 2023-2024 Fund and potential Legacy Fund would help the development close the remaining 10-15% funding gap.

This project serves as a legacy impact project to serve Newberg for generations to come.

Acronym Definitions

Acronym	Definition
CCO	Catholic Charities of Oregon
CWC	Community Wellness Collective
PSH	Permanent Supportive Housing
YCCO	Yamhill Community Care Organization
HHS	Yamhill County Health and Human Services
OHCS	Oregon Housing Community Services
LIFT	Local Innovation Housing Tax Credits
LIHTC	Low Income Housing Tax Credits
MFI	Median Family Income
D/M/W/ESB/SDVBE	Disadvantaged, Minority-Owned, Women-owned, Emerging Small Businesses, and / or Service Disabled Veterans Business Enterprises
PBVs	Price by Volume
AMI	Area Median Income



Newberg Construction Excise Tax (CET) Funding Request Application

NOTE: The first round of applications are due April 4, 2024 at 4:30 p.m.
Applications are to be submitted to Leanne Wagener, Assistant Planner by email at leanne.wagener@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: The HEART of Newberg	Edlen & Co.	CCO & CWC
Organization Name: Catholic Charities, Edlen & Co., Community Wellness Collective	<input checked="" type="checkbox"/> For-profit	<input checked="" type="checkbox"/> Non-profit
Contact Name/Title: Pooja Dalal, CCO, Dir. of Community Development Kate Stokes, CWC, Exec. Dir.		
Mailing Address: 2740 SE Powell Boulevard	State/Zip: Portland, OR 97202	
Phone: 503.688.2537	Email: PDalal@CCOregon.org kate@communitywellnesscollective.org	

PROJECT INFORMATION:

Total project cost: _____
Requested amount of CET funding: \$397,050 with consideration for Legacy Fund
Has this project requested or will request funds from the Affordable Housing Trust Fund? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Amount requested: _____
Amount and description of other matching funds being contributed to the project, if applicable: Phase 1: OHCS PSC Capital Funding (\$14,340,000), Private Funding (\$2,083,000) Phase 2: OHCS LIFT (\$15,631,561) private bond (\$11,227,949)
Has this organization received Newberg CET funds in the past? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Amount received: _____

Project Partners and their Contributions to the Project: Providence: Land donation
Catholic Charities of Oregon: Owner and operator of Property with lead financial responsibility
Community Wellness Collective: Lead Services Provider, revenue billing providers
Potential Community Partners: Unidos, HHS, Providence, YCCO

Estimated project beginning date: August, 2024	Completion date: Phase 1: July, 2026
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[Phase 2: September, 2027](#)

**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:

[See attached document for more detailed response.](#)

Together, Providence, Catholic Charities of Oregon, Edlen & Co., and Community Wellness Collective, seek to contribute to the housing crisis in the Newberg-Dundee community through a diverse housing development. The development will serve recuperative, permanent supportive, and workforce affordable units. Leveraging our organizational strengths, Providence will donate the parcel on 99W and Providence Drive to Catholic Charities to own and property manage, Edlen & Co will develop the property, and Community Wellness Collective will provide services to building clients, bringing to the table many community and faith-based organizations for partnership.

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 Competative Selection Criteria, attached (please select)

Briefly describe what is attached:

[See attached document for more detailed response.](#)

Attached:

[Project Overview and Visual with Funding Sources](#)

[Long-Form responses to questions](#)

ATTACHMENT A

Construction Excise Tax (CET) Fund FY 2022-23 Competitive 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 for a period of at least 60 years following the date of construction (threshold verification)*.	NA
2. The project is ready for implementation with documentation to demonstrate financial feasibility.	NA
3. 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, review procurement requirements and limitations before obtaining a purchase option.	NA
4. 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
5. The proposal demonstrates that the Construction Excise Tax (CET) Funds are the most appropriate funding source for the project. Provide a description of a financing gap that includes funding sources or demonstrates budget constraints that limit the ability to pay or finance projects.	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 provides deeply affordable housing for households earning less than 50% of the median family income.	Up to 10 points
9. The project provides extremely affordable housing for households earning less than 30% of the median family income. Projects could include permanent supportive housing and/or transitional housing for families or individuals who are houseless.	Up to 5 points
10. Project concepts and designs showing close proximity to schools, parks, commercial areas, public transportation, services and jobs, and demonstration of cost-effective sustainability and energy-efficiency measures.	Up to 10 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 2023, the Median Family Income for the City of Newberg was \$114,400.**

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.

Letters of Support:

The following elected officials and community organizations have expressed formal support for this project and our application to Oregon Housing and Community Services for the project-based voucher program to support this diverse housing program.

- **Representative Anna Scharf**
- **Commissioner Mary Starrett**
- **Chehalem Valley Chamber of Commerce**
- **Newberg-Dundee Public Schools**
- **Long-time business owner and community leader, Dennis Lewis**

Anticipated letters of support to come:

- Northside Community Church
- Unidos
- HHS Yamhill County
- Providence

We appreciate your support.

ANNA SCHARF
STATE REPRESENTATIVE
DISTRICT 23



March 28, 2024

Oregon Housing and Community Services PSH Committee,

Newberg, like much of the rest of Oregon, has seen an increase in residents with housing insecurity and homelessness in recent years. Community and faith-based organizations have done all they can to share the responsibility of supporting those in immediate need. However, the lack of stable, consistent funding for sheltering, combined with a need for access to permanent solutions, drives us to find a long-term solution.

Community Wellness Collective (CWC) has provided the county's only seven-night a week shelter, located in Newberg, for the last three years. This has given our community a glimpse into the staggering need across Yamhill County, as many with housing insecurity sleep in Newberg due to the services and stability that CWC provides. During the past three years, CWC has averaged 18-35 residents per night. The primary population in need has been single men with a known medically chronic, mental health or substance use disorder. CWC has worked to build bridges with faith and community-based organizations, with an existing presence in Newberg, to provide the highest level of service, care, and coordination towards long-term housing.

The HEART of Newberg project, located on 99W and Providence Drive, will build off the relationships and services established by CWC over the years. This along with the proven housing outcomes Catholic Charities of Oregon (CCO) has demonstrated, and the colocation to Providence Health and Services, will form a unique and successful opportunity to provide housing, care, and support services.

The property is walking distance from downtown Newberg, and the Yamhill County Transit bus line has a stop directly in front of the property, ensuring access to transportation for employment, appointments, and other needs.

This project is the culmination of years of community effort and engagement, seeking to provide comprehensive supports to our residents across the county. A solution that can offer safe housing and help with medical and mental health needs. My office is in support of this project and commends CCO and CWC in their efforts and is happy to help in any way we can to see its success come to fruition.

Thank you for your consideration of this project.

Regards,

A handwritten signature in black ink that reads "Anna Scharf". The signature is written in a cursive style.

Rep. AnnaScharf@oregonlegislature.gov – www.oregonlegislature.gov/Scharf
900 Court Street NE, Salem, OR 97301 – (503) 986-1423



BOARD OF COUNTY COMMISSIONERS

LINDSAY BERSCHAUER • KIT JOHNSTON • MARY STARRETT

535 NE Fifth Street • McMinnville, OR 97128-4523

(503) 434-7501 • Fax (503) 434-7553

TTY (800) 735-2900 • www.yamhillcounty.gov

March 24, 2024

Oregon Housing and Community Services PSH Committee,

Newberg and Yamhill County have seen the impacts of increased social determinants of health needs in recent years. Our local community and faith-based organizations have worked together to support those in need, but without stable, consistent funding for temporary and permanent housing and supports, we have limited options to meet our community's needs.

Community Wellness Collective (CWC) has provided the County's only seven-night a week shelter, located in Newberg, for the last three years. Many have sought help in Newberg because of the services and reliability CWC provides. The organization has averaged 18-35 residents per night, with the primary population in need being single men with chronic physical, mental health or substance use challenges. CWC has worked successfully with faith and other community-based organizations in Newberg to provide services to those in need.

The HEART of Newberg project, located on 99W and Providence Drive, will build on the relationships and services established by CWC over the years, along with Catholic Charities of Oregon housing successes across Oregon. Colocation to Providence Health and Services medical services will provide access to health care and supports. The property is within walking distance of downtown Newberg and is served by the Yamhill County Transit bus line with a stop directly in front of the property.

This project is the culmination of years of community effort and engagement to provide comprehensive supports to Yamhill County's residents in need of safe housing to address their medical and mental health needs.

I support this project wholeheartedly.

Thank you for considering our community's needs.

Sincerely,

Mary Starrett
Yamhill County Commissioner



March 25, 2024

Chehalem Valley Chamber of Commerce
112 N Garfield St, Suite 103
Newberg, OR 97132

Oregon Housing and Community Services PSH Committee,

The Newberg community, and Yamhill County as a whole, has seen the impacts of growing social determinants of health needs over the recent years. Newberg residents with housing insecurity and homelessness has become more visible and the community has attempted its best efforts for sheltering. Community and faith-based organizations have shared the responsibility of supporting those in immediate need, but the lack of stable, consistent funding for sheltering, combined with a need for access to permanent solutions with a supportive team, unifies us for a long-term solution to impact Yamhill County for generations to come.

Community Wellness Collective has provided the county's only seven-night a week shelter, located in Newberg, for the last three years. This has given our community a glimpse into the staggering need across Yamhill County, as many with housing insecurity sleep in Newberg due to the services and stability CWC provides. The organization has averaged 18-35 residents per night, with the primary population in need single men with a known medically chronic, mental health or substance use disorder. CWC has worked to build bridges with faith and community-based organizations with a presence in Newberg to provide the highest level of service, care, and coordination to long-term housing.

The HEART of Newberg project, located on 99W and Providence Drive, will build off the relationships and services established by CWC over the years, with the proven housing outcomes Catholic Charities of Oregon has demonstrated across Oregon. Colocation to Providence Health and Services medical services provides access to health care and support. The property also is walking distance from downtown Newberg and the Yamhill County Transit bus line has a stop directly in front of the property, ensuring access to transportation for employment, appointments, and other needs.

This project is the culmination of years of community effort and engagement to provide comprehensive supports to our residents across the county in desperate need of safe housing to tend to their medical and mental health needs. Without hesitation, our organization supports this project and intends to support CCO and CWC in their efforts when built and operational.

Thank you for your consideration to our community need.

Sincerely,

Scott Parker

Scott Parker
Executive Director
Chehalem Valley Chamber of Commerce

112 N Garfield St, Suite 103, Newberg OR 97132

P 503-538-2014

www.chehalemvalley.org



April 1, 2024

Oregon Housing and Community Services PSH Committee,

The Newberg community, and Yamhill County as a whole, has seen the impacts of growing social determinants of health needs over the recent years. Newberg residents with housing insecurity and homelessness has become more visible and the community has attempted its best efforts for sheltering. Community and faith-based organizations have shared the responsibility of supporting those in immediate need, but the lack of stable, consistent funding, combined with a need for access to permanent solutions, unifies us for a long-term solution for generations to come.

Community Wellness Collective has provided the county's only seven-night a week shelter, located in Newberg, for the last three years. This has given our community a glimpse into the staggering need across Yamhill County, as many with housing insecurity sleep in Newberg due to the services and stability CWC provides. The organization has averaged 18-35 residents per night; with the primary population in need single men with a known medically chronic, mental health or substance use disorder. CWC has worked to build bridges with faith and community-based organizations with a presence in Newberg to provide the highest level of service, care, and coordination to long-term housing.

The HEART of Newberg project, located on 99W and Providence Drive, will build off the relationships and services established by CWC over the years, with the proven housing outcomes, Catholic Charities of Oregon has demonstrated across Oregon. Colocation to Providence Health and Services medical services provides access to health care and support. The property also is walking distance from downtown Newberg and the Yamhill County Transit bus line has a stop directly in front of the property, ensuring access to transportation for employment, appointments, and other needs.

This project is the culmination of years of community effort and engagement to provide comprehensive supports to our residents across the county in desperate need of safe housing to tend to their medical and mental health needs. Without hesitation, our organization supports this project and intends to support CCO and CWC in their efforts when built and operational.

Thank you for your consideration to our community need.

Stephen W. Phillips
Superintendent
Newberg Dundee Public Schools

March 26, 2024

Oregon Housing and Community Services PSH Committee,

Newberg residents with housing insecurity and homelessness **has** become more visible and the community has attempted its best efforts for sheltering. Community and faith-based organizations have shared the responsibility of supporting those in immediate need, but the lack of stable, consistent funding for sheltering, combined with a need for access to permanent solutions with a supportive team, unifies us for a long-term solution to impact Yamhill County for generations to come.

Community Wellness Collective has provided the county's only seven-night a week shelter, located in Newberg, for the last three years. This has given our community a glimpse into the staggering need across Yamhill County, as many with housing insecurity sleep in Newberg due to the services and stability CWC provides. The organization has averaged 18-35 residents per night, with the primary population in need single men with a known medically chronic, mental health or substance use disorder. CWC has worked to build bridges with faith and community-based organizations with a presence in Newberg to provide the highest level of service, care, and coordination to long-term housing.

The HEART of Newberg project, located on 99W and Providence Drive, will build off the relationships and services established by CWC over the years, with the proven housing outcomes Catholic Charities of Oregon has demonstrated across Oregon. Colocation to Providence Health and Services medical services provides access to health care and support. The property also is walking distance from downtown Newberg and the Yamhill County Transit bus line has a stop directly in front of the property, ensuring access to transportation for employment, appointments, and other needs.

This project is the culmination of years of community effort and engagement to provide comprehensive supports to our residents across the county in desperate need of safe housing to tend to their medical and mental health needs. Without hesitation, our organization supports this project and intends to support CCO and CWC in their efforts when built and operational.

I am in full support of this next step project to help our community provide much needed support to the most vulnerable of us. My hope is that this project will provide a simple model for future efforts to help those in vulnerable positions in life.

Thank you for your consideration of our community's needs.

Sincerely,
Dennis Lewis



Dennis Lewis
Lewis Audio Video

 dennis@lewisav.com

 [503-538-1190](tel:503-538-1190)



503-537-4501
2112 Portland Rd.
Newberg, OR 97132

lewisav.com



OR CCB# 177627 WA L&I# LEWISAV893k3

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Attachment 3.a

**CET Fund Application – Avamere at Newberg
Staff Evaluation**

Note: Avamere is a for-profit facility facilitating Medicare benefits. Medicare is currently not considered an affordable housing program.

ATTACHMENT A
Construction Excise Tax (CET) Fund
FY 2022-23 Competative 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 for a period of at least 60 years following the date of construction (threshold verification)*.	NA Does not meet criteria
2. The project is ready for implementation with documentation to demonstrate financial feasibility.	NA Does not meet criteria
3. 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, review procurement requirements and limitations before obtaining a purchase option.	NA Does not meet criteria
4. 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 Partially meets criteria
5. The proposal demonstrates that the Construction Excise Tax (CET) Funds are the most appropriate funding source for the project. Provide a description of a financing gap that includes funding sources or demonstrates budget constraints that limit the ability to pay or finance projects.	NA Does not meet criteria Not part of a program/project to provide long-term affordability
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 Staff awards 5 points
8. The project provides deeply affordable housing for households earning less than 50% of the median family income.	Up to 10 points Staff awards 10 points
9. The project provides extremely affordable housing for households earning less than 30% of the median family income. Projects could include permanent supportive housing and/or transitional housing for families or individuals who are houseless.	Up to 5 points Staff awards 5 points
10. Project concepts and designs showing close proximity to schools, parks, commercial areas, public transportation, services and jobs, and demonstration of cost-effective sustainability and energy-efficiency measures.	Up to 10 points Mostly NA and without supporting documentation. Staff awards 4 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 NA in that volunteers and local business support is aimed at healthcare. Staff awards 0 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 Staff awards 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 Avamere is not an affordable housing project. Staff awards 0 points
14. The budget and timeline are thorough and realistic (evidence of construction and/ or service costs required with application).	Up to 10 points No supporting documentation. Staff awards 0 points.
Total Potential Points	70 Staff awards 34 total points

Note: Avamere is a for-profit facility facilitating Medicare benefits. Medicare is currently not considered an affordable housing program.

ATTACHMENT A

Construction Excise Tax (CET) Fund FY 2022-23 Competitive 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 for a period of at least 60 years following the date of construction (threshold verification)*.	NA Does not meet criteria
2. The project is ready for implementation with documentation to demonstrate financial feasibility.	NA Does not meet criteria
3. 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, review procurement requirements and limitations before obtaining a purchase option.	NA Does not meet criteria
4. 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 Partially meets criteria
5. The proposal demonstrates that the Construction Excise Tax (CET) Funds are the most appropriate funding source for the project. Provide a description of a financing gap that includes funding sources or demonstrates budget constraints that limit the ability to pay or finance projects.	NA Does not meet criteria Not part of a program/project to provide long-term affordability
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 Staff awards 5 points
8. The project provides deeply affordable housing for households earning less than 50% of the median family income.	Up to 10 points Staff awards 10 points
9. The project provides extremely affordable housing for households earning less than 30% of the median family income. Projects could include permanent supportive housing and/or transitional housing for families or individuals who are houseless.	Up to 5 points Staff awards 5 points
10. Project concepts and designs showing close proximity to schools, parks, commercial areas, public transportation, services and jobs, and demonstration of cost-effective sustainability and energy-efficiency measures.	Up to 10 points Mostly NA and without supporting documentation. Staff awards 4 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 NA in that volunteers and local business support is aimed at healthcare. Staff awards 0 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 Staff awards 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 Avamere is not an affordable housing project. Staff awards 0 points
14. The budget and timeline are thorough and realistic (evidence of construction and/ or service costs required with application).	Up to 10 points No supporting documentation. Staff awards 0 points.
Total Potential Points	70

Staff awards 34 total points

Note: Avamere is a for-profit facility facilitating Medicare benefits. Medicare is currently not considered an affordable housing program.

ATTACHMENT A
Construction Excise Tax (CET) Fund
FY 2022-23 Competative 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 for a period of at least 60 years following the date of construction (threshold verification)*.	NA Does not meet criteria
2. The project is ready for implementation with documentation to demonstrate financial feasibility.	NA Does not meet criteria
3. 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, review procurement requirements and limitations before obtaining a purchase option.	NA Does not meet criteria
4. 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 Partially meets criteria
5. The proposal demonstrates that the Construction Excise Tax (CET) Funds are the most appropriate funding source for the project. Provide a description of a financing gap that includes funding sources or demonstrates budget constraints that limit the ability to pay or finance projects.	NA Does not meet criteria Not part of a program/project to provide long-term affordability
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 Staff awards 5 points
8. The project provides deeply affordable housing for households earning less than 50% of the median family income.	Up to 10 points Staff awards 10 points
9. The project provides extremely affordable housing for households earning less than 30% of the median family income. Projects could include permanent supportive housing and/or transitional housing for families or individuals who are houseless.	Up to 5 points Staff awards 5 points
10. Project concepts and designs showing close proximity to schools, parks, commercial areas, public transportation, services and jobs, and demonstration of cost-effective sustainability and energy-efficiency measures.	Up to 10 points Mostly NA and without supporting documentation. Staff awards 4 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 NA in that volunteers and local business support is aimed at healthcare. Staff awards 0 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 Staff awards 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 Avamere is not an affordable housing project. Staff awards 0 points
14. The budget and timeline are thorough and realistic (evidence of construction and/ or service costs required with application).	Up to 10 points No supporting documentation. Staff awards 0 points.
Total Potential Points	70 Staff awards 34 total points

Attachment 3.b

**CET Fund Application – Avamere at Newberg
Application Materials**



Newberg Construction Excise Tax (CET) Funding Request Application

NOTE: The first round of applications are due April 4, 2024 at 4:30 p.m.
Applications are to be submitted to Leanne Wagener, Assistant Planner by email at leanne.wagener@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: R. Ainsworth	
Organization Name: Avamere at Newberg	<input checked="" type="checkbox"/> For-profit <input type="checkbox"/> Non-profit
Contact Name/Title: Erika Lopez, Business Office Manager	
Mailing Address: 730 Foothills Dr	State/Zip: OR 97132
Phone: 503-554-0767	Email: elopez@avamere.com

PROJECT INFORMATION:

Total project cost:	<u>\$3,365.00</u>
Requested amount of CET funding:	<u>\$3,365.00</u>
Has this project requested or will request funds from the Affordable Housing Trust Fund?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Amount requested: _____
Amount and description of other matching funds being contributed to the project, if applicable: _____	
Has this organization received Newberg CET funds in the past?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Amount received: _____

Project Partners and their Contributions to the Project: _____
Resident continues to pay his current rent on time.

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:**

The problem being solved with this funding is that this resident of Avamere Newberg **would be avoiding** eviction and therefore be without housing and care.

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:

Decription of how this application meets the funding criteria

Attachment A

Minimum threshold Criteria:

1. Resident is on a fixed income and cannot afford any larger payments.
2. The resident currently has housing, project is already implemented.
3. NA
4. There will be no relocation of residents if funding is received.
5. Residents are on a fixed income and their portion of liability is based off income **and** determined by Medicaid.

Scored Application Criteria:

7. Funding from the project allows the resident to retain their existing housing within **the** community of Newberg.
8. Resident is on a fixed income through social security and earns less than 50% of **median** income. With Medicaid, housing is extremely affordable for them.
9. Resident is on a fixed income through social security and earns less than 30% of **median** income. With Medicaid, housing is extremely affordable for them. With their past **due rent** paid, they would be able to retain permanent housing.
10. Avamere at Newberg is within 2 miles of multiple parks and schools.
11. Community works alongside volunteers and other local businesses to provide **top notch** quality care for seniors.
12. The project would aid seniors already receiving services from Medicaid to retain **permanent** housing.
13. Avamere at Newberg is submitting the applications on behalf of our residents (**with their** permission) facing eviction. We have provided quality care and housing within the community for over 20 years.
14. The residents submitting these applications are current residents. The timeline is **about 90** days for their accounts to be caught up before we have to seek other potions for **these** residents.



Newberg Construction Excise Tax (CET) Funding Request Application

NOTE: The first round of applications are due April 4, 2024 at 4:30 p.m.

Applications are to be submitted to Leanne Wagener, Assistant Planner by email at leanne.wagener@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: B. Richmond	
Organization Name: Avamere at Newberg	<input checked="" type="checkbox"/> For-profit <input type="checkbox"/> Non-profit
Contact Name/Title: Erika Lopez, Business Office Manager	
Mailing Address: 730 Foothills Dr	State/Zip: OR 97132
Phone: 503-554-0767	Email: elopez@avamere.com

PROJECT INFORMATION:

Total project cost:	\$6,175.60
Requested amount of CET funding:	\$6,175.60
Has this project requested or will request funds from the Affordable Housing Trust Fund?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Amount requested: _____
Amount and description of other matching funds being contributed to the project, if applicable: _____	
Has this organization received Newberg CET funds in the past?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Amount received: _____

Project Partners and their Contributions to the Project: _____
Resident continues to pay his current rent on time. _____ _____ _____

Estimated project beginning date: _____	Completion date: _____
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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:

The problem being solved with this funding is that this resident of Avamere Newberg would be avoiding eviction and therefore be without housing and care.

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 Competative Selection Criteria, attached (please select)

Briefly describe what is attached:

Decription of how this application meets the funding criteria

Attachment A

Minimum threshold Criteria:

1. Resident is on a fixed income and cannot afford any larger payments.
2. The resident currently has housing, project is already implemented.
3. NA
4. There will be no relocation of residents if funding is received.
5. Residents are on a fixed income and their portion of liability is based off income **and** determined by Medicaid.

Scored Application Criteria:

7. Funding from the project allows the resident to retain their existing housing within the community of Newberg.
8. Resident is on a fixed income through social security and earns less than 50% of **median** income. With Medicaid, housing is extremely affordable for them.
9. Resident is on a fixed income through social security and earns less than 30% of **median** income. With Medicaid, housing is extremely affordable for them. With their past **due rent** paid, they would be able to retain permanent housing.
10. Avamere at Newberg is within 2 miles of multiple parks and schools.
11. Community works alongside volunteers and other local businesses to provide **top notch** quality care for seniors.
12. The project would aid seniors already receiving services from Medicaid to retain **permanent** housing.
13. Avamere at Newberg is submitting the applications on behalf of our residents (**with their** permission) facing eviction. We have provided quality care and housing within the community for over 20 years.
14. The residents submitting these applications are current residents. The timeline **is about 90** days for their accounts to be caught up before we have to seek other potions for **these** residents.



Newberg Construction Excise Tax (CET) Funding Request Application

NOTE: The first round of applications are due April 4, 2024 at 4:30 p.m.
Applications are to be submitted to Leanne Wagener, Assistant Planner by email at leanne.wagener@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: J. Velez	
Organization Name: Avamere at Newberg	<input checked="" type="checkbox"/> For-profit <input type="checkbox"/> Non-profit
Contact Name/Title: Erika Lopez, Business Office Manager	
Mailing Address: 730 Foothills Dr	State/Zip: OR 97132
Phone: 503-554-0767	Email: elopez@avamere.com

PROJECT INFORMATION:

Total project cost:	<u>\$9,634.61</u>
Requested amount of CET funding:	<u>\$9,634.61</u>
Has this project requested or will request funds from the Affordable Housing Trust Fund?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Amount requested: _____
Amount and description of other matching funds being contributed to the project, if applicable: _____	
Has this organization received Newberg CET funds in the past?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Amount received: _____

Project Partners and their Contributions to the Project: _____
Resident has continued to pay his current due rent since October 2023. _____ _____

Estimated project beginning date: _____	Completion date: _____
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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:**

The problem being solved with this funding is that this resident of Avamere Newberg **would be avoiding** eviction and therefore be without housing and care.

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:

Description of how this application meets the funding criteria

Attachment A

Minimum threshold Criteria:

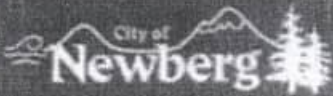
1. Resident is on a fixed income and cannot afford any larger payments.
2. The resident currently has housing, project is already implemented.
3. NA
4. There will be no relocation of residents if funding is received.
5. Residents are on a fixed income and their portion of liability is based off income **and** determined by Medicaid.

Scored Application Criteria:

7. Funding from the project allows the resident to retain their existing housing within **the** community of Newberg.
8. Resident is on a fixed income through social security and earns less than 50% of **median** income. With Medicaid, housing is extremely affordable for them.
9. Resident is on a fixed income through social security and earns less than 30% of **median** income. With Medicaid, housing is extremely affordable for them. With their past **due rent** paid, they would be able to retain permanent housing.
10. Avamere at Newberg is within 2 miles of multiple parks and schools.
11. Community works alongside volunteers and other local businesses to provide **top notch** quality care for seniors.
12. The project would aid seniors already receiving services from Medicaid to retain **permanent** housing.
13. Avamere at Newberg is submitting the applications on behalf of our residents (**with their** permission) facing eviction. We have provided quality care and housing within the community for over 20 years.
14. The residents submitting these applications are current residents. The timeline is **about 90** days for their accounts to be caught up before we have to seek other potions for **these** residents.

Attachment 4.a

**CET Fund Application – Robert Velez on behalf of John Velez
Application Materials**



Newberg Construction Excise Tax (CET) Funding Request Application

NOTE: The first round of applications are due April 4, 2024 at 4:30 p.m.
Applications are to be submitted to Leanne Wagener, Assistant Planner by email at leanne.wagener@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:	JOHN VELEZ		
Organization Name:	AUAMERE - NEWBERG	<input checked="" type="checkbox"/> For-profit	<input type="checkbox"/> Non-profit
Contact Name/Title:	JOHN VELEZ - RESIDENT		
Mailing Address:	P.O. Box 92, NEWBERG	State/Zip:	OR 97132
Phone:	503-490-4059	Email:	WINEPOURED @ GMAIL . COM

PROJECT INFORMATION:

Total project cost:	\$ 11,767.61		
Requested amount of CET funding:	\$ 11,767.61		
Has this project requested or will request funds from the Affordable Housing Trust Fund?	<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes	Amount requested: 11,767.61
Amount and description of other matching funds being contributed to the project, if applicable:	NONE		
Has this organization received Newberg CET funds in the past?	<input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes	Amount received: _____

Project Partners and their Contributions to the Project:	NONE		

Estimated project beginning date:	N/A	Completion date:	
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PLANNING DIVISION
(503) 537-1240
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Please briefly describe the affordable housing problem this project is trying to solve and how it helps in solving that challenge:

John Velez is a resident of Avamere Newberg Assisted Living at 730 Foothills Dr., in Apt. 113.

He is paying \$2,541.00 monthly rent. Of this amount, the State of Oregon pays \$1,830.00 directly to Avamere. He is responsible for the balance of \$711.00 from his small Social Security payment of \$968.00

He contracted Covid-19 during the pandemic and ended up purchasing medical and other supplies and failed to pay this balance. As a result, he is in arrears \$11,767.61. Without this payment he faces eviction with no other place to go.

Since October of 2023 an automatic payment has been in place to assure that the \$711.00 is paid.

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:

STATE OF OREGON DEPARTMENT OF HUMAN SERVICES
PROVIDER PAYMENT SUMMARY FOR
JOHN O VELEZ AS OF 8/03/23

00134

<p>*** PROVIDER INFORMATION ***</p> <p>Type of Facility: ASSISTED LIVING FACILITY</p> <p>Provider Name and Address: AVAMERE LIVING AT NEWBERG 730 FOOTHILLS DR NEWBERG OR 97132-6004</p> <p>Telephone: (503)554-0767 Prov Number: 505092</p>	<p>*** CLIENT INFORMATION ***</p> <p>Client Name and Address: VELEZ, JOHN O PO BOX 92 NEWBERG OR 97132-0000</p> <p>Cost Center: 3617 - MCMINN DIS Case Number: 401598226 Prime Number: DN301A9L</p>																				
<p>*** PROVIDER SUMMARY ***</p> <table style="width:100%; border-collapse: collapse;"> <tr> <td style="width:60%;">Room/Board</td> <td style="text-align: right;">\$711.00</td> </tr> <tr> <td>Service</td> <td style="text-align: right;">\$1,830.00</td> </tr> <tr> <td>Total</td> <td style="text-align: right;">\$2,541.00</td> </tr> <tr> <td>Client Pays</td> <td style="text-align: right;">\$711.00</td> </tr> <tr> <td>State Pays</td> <td style="text-align: right;">\$1,830.00</td> </tr> <tr> <td>Total</td> <td style="text-align: right;">\$2,541.00</td> </tr> </table>	Room/Board	\$711.00	Service	\$1,830.00	Total	\$2,541.00	Client Pays	\$711.00	State Pays	\$1,830.00	Total	\$2,541.00	<p>PROV/BEN:</p> <p>*** CLIENT SUMMARY ***</p> <table style="width:100%; border-collapse: collapse;"> <tr> <td style="width:30%;"></td> <td style="width:30%; text-align: center;">INCOME</td> <td style="width:30%;"></td> <td style="width:10%; text-align: center;">NEED</td> </tr> <tr> <td>TOTAL</td> <td style="text-align: right;">\$0.00</td> <td>TOTAL</td> <td style="text-align: right;">\$0.00</td> </tr> </table>		INCOME		NEED	TOTAL	\$0.00	TOTAL	\$0.00
Room/Board	\$711.00																				
Service	\$1,830.00																				
Total	\$2,541.00																				
Client Pays	\$711.00																				
State Pays	\$1,830.00																				
Total	\$2,541.00																				
	INCOME		NEED																		
TOTAL	\$0.00	TOTAL	\$0.00																		
<p>Services to be provided are described in the SDSD Client Plan or the MHDDSD Plan of Care.</p>																					

RECIPIENT NARRATIVE:

This 512 reflects a 10% increase due to the Enhanced Wage Add On Program authorized by the legislature.

THIS DOCUMENT IS INCORPORATED INTO THE ADULT FOSTER CARE SERVICES CONTRACT

Worker Signature:	Date: 08/03/23	Worker Signature:	Date: 08/03/23
Title: 99	Tele: 472-9441	Title:	Tele:
Provider Signature:		Date:	

Attachment 5.a

**NAHTF Application – Newberg Habitat for Humanity
Staff Evaluation**

ATTACHMENT A

Construction Excise Tax (CET) Fund FY 2022-23 Competitive 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 for a period of at least 60 years following the date of construction (threshold verification)*.	NA Program meets criteria
2. The project is ready for implementation with documentation to demonstrate financial feasibility.	NA Program meets criteria
3. 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, review procurement requirements and limitations before obtaining a purchase option.	NA Program meets criteria
4. 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 Program meets criteria
5. The proposal demonstrates that the Construction Excise Tax (CET) Funds are the most appropriate funding source for the project. Provide a description of a financing gap that includes funding sources or demonstrates budget constraints that limit the ability to pay or finance projects.	NA Program meets criteria
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 Staff awards 10 points
8. The project provides deeply affordable housing for households earning less than 50% of the median family income.	Up to 10 points Staff awards 10 points
9. The project provides extremely affordable housing for households earning less than 30% of the median family income. Projects could include permanent supportive housing and/or transitional housing for families or individuals who are houseless.	Up to 5 points Staff awards 5 points
10. Project concepts and designs showing close proximity to schools, parks, commercial areas, public transportation, services and jobs, and demonstration of cost-effective sustainability and energy-efficiency measures.	Up to 10 points Staff awards 10 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 Staff awards 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 Staff awards 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 Staff awards 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 Staff awards 10 points
Total Potential Points	70

Staff awards 70 total points

Attachment 5.b

**NAHTF Application – Newberg Habitat for Humanity
Application Materials**



Newberg Affordable Housing Trust Fund Funding Request Application

FY 2023-24 Competitive Awards Loan Program

NOTE: The first round of applications are due March 13, 2024 at 4:30 p.m.

Applications are to be submitted to Leanne Wagener by email at leanne.wagener@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: College Street Homes	
Organization Name: Newberg Area Habitat for Humanity	<input type="checkbox"/> For-profit <input checked="" type="checkbox"/> Non-profit
Contact Name/Title: Shannon Selah, Executive Director	
Mailing Address: PO Box 118	State/Zip: Newberg, OR 97132
Phone: 503-537-9938	Email: shannon@newberghabitat.org

PROJECT INFORMATION:

Total project cost: \$416,400
Requested amount of funding: \$28,580 (Time Sensitive Grant Program) <i>Please specify the amount of loans or grants being requested</i>
Amount and description of matching funds being contributed to the project: \$115,000 per home (\$345,000) is supported by Oregon Housing and Community Services Local Innovation and Fast Track Homeownership (LIFT) program. Additional sources contributing to the remaining budget include proceeds from the Newberg Area Habitat for Humanity (NAHFH) ReStore, individual donations, and in-kind donations of materials and labor.

Project Partners and their Contributions to the Project:

To provide financial and homeownership education, NAHFH partners with the Housing Authority of Yamhill County. NAHFH receives support for a variety of funders. Most notably, this project is utilizing funds from Oregon Housing and Community Services' LIFT. Locally, NAHFH is financially supported by Yamhill Community Care and Oregon Realtors HOME Foundation, among others.

Estimated project beginning date: June 2023	Completion date: November 2024
---	--------------------------------

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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:

This project addresses the lack of affordable homes for sale in Newberg, Oregon. To solve the issue, this project will create three new single-family homes to be sold at affordable prices to first-time homebuyers. Another affordable housing problem is an inadequate stock of permanently affordable homeownership. The homes built by this project will be sold using the community land trust model to ensure the homes remain in the affordable housing market in perpetuity. To create lasting homeownership for the first-time homebuyers partnered with Newberg Area Habitat for Humanity (NAHFH), the NAHFH homeownership program includes financial and homeowner education courses prior to the sale of the home. Additionally, NAHFH helps to serve those who are most underrepresented in homeownership. Currently, Fourteen of the nineteen households currently holding Habitat mortgages in Newberg are led by Black, Indigenous, Latinx, and people of color.

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:

Attached is a narrative describing Newberg Area Habitat for Humanity affordable home development project. Additionally, we included the construction budget for a single home — this project will build three homes.

ATTACHMENT A

Newberg Affordable Housing Trust Fund FY 2023-24 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 2023, the Median Family Income for the City of Newberg was \$114,400.**

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 Area Habitat for Humanity College Street Homes

The project provides new affordable housing, or new affordability, through retention or rehabilitation of existing housing, within the city.

This project will build three new single-family homes to be sold at affordable prices to first-time homebuyers. The project is located on N. College Street in Newberg, near many resources and amenities. The two-story homes will each have three bedrooms, an open plan area combining the living, dining and kitchen areas, a washer and dryer, and water heater.

Presently, site work is nearly complete and vertical construction is set to begin this month. Homes in this project have an anticipated completion date of November 2024. Funding will directly support construction costs, including materials and labor. This funding is critical to helping the project on track with the determined timeline.

Once the homes are complete, they will be sold using a community land trust model to ensure permanent affordability. New homebuyers are typically partnered with Habitat for up to a year before the homes are sold. During this time, families and individuals partnered with Newberg Area Habitat for Humanity (NAHFH) for homeownership build their homes alongside staff and volunteers, and participate in pre-mortgage financial and homebuyer education to create lasting homeownership.

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.

NAHFH uses the community land trust model to ensure permanent affordability. At time of sale, the land will be leased to homebuyers for a renewable term of 99 years. Written into the sales agreement is that NAHFH has the right of first refusal if the homeowner sells prior to paying off their first mortgage. If the owner has paid off their mortgage by the time they resell, there is a deed restriction protecting the home from being sold to buyers who earn above 80%. The deed restriction ensures the home remains in the affordable housing market beyond the life of the mortgage.

The project provides deeply affordable housing for households earning less than 30% of the median family income.

NAHFH serves homebuyers who earn between 25 and 60% AMI. NAHFH utilizes supplementary mortgage products to help the homes we sell be more affordable to our buyers. For example, NAHFH partners with Habitat for Humanity of Oregon (Habitat

Oregon) to access down payment assistance. NAHFH applies to Habitat Oregon on behalf of homebuyers to receive down payment assistance of up to \$60,000. NAHFH also utilizes the First Federal Savings and Loan Down Payment Assistance Program for up to \$15,000 per homebuyer. Individual Development Account (IDA) funds are also a source available to NAHFH homebuyers through our partnership with Habitat Oregon. The matched savings can be spent on down payments and closing costs.

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.

Habitat homes are built using high quality materials and state-of-the-art energy-efficient designs that exceed industry standards with the aim of reducing waste and increasing efficiency. Construction efficiency is maintained by selecting materials with low embodied energy, such as recycled and locally produced materials, that reduces cost as well as Habitat's carbon footprint. NAHFH constructs homes to a certification standard greater than Oregon building code, Energy Start Certification at minimum. The homes will be constructed with all electric appliances. Additionally, Landscaping features will predominantly feature plants native to Oregon.

NAHFH also operates a home improvement resale store in Newberg, the ReStore, that collects community donations of home goods and building materials. NAHFH sells the donated goods at a discounted price, helping community members to access home improvement materials at affordable prices. This helps to keep usable goods out of landfills and proceeds help to support home construction.

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.

NAHFH has served Newberg and surrounding communities with affordable homeownership opportunities since 1994. In our 30 years of service, we have developed strong relationships within our community that help us improve our programs and reach more community members. Through targeted outreach and ongoing collaborations with schools, churches, community organizations, and other local partners, NAHFH has established a pipeline of prospective homebuyers seeking housing assistance. Key community partners we utilize to reach our community include Yamhill Community Action Partnership and CASA of Oregon.

To solicit applications, we directly reach out to the following organizations: Chehalem Valley Chamber of Commerce, Housing Authority of Yamhill County, Yamhill Community Action Partnership, the Newberg School District, the Newberg Area Ministerial Association, the Newberg Downtown Coalition, Unidos Bridging Community, and CASA of Oregon. For example, NAHFH partners with the Welcome Center at Newberg School District to reach families of color who might be interested in a Habitat homeowner program. This

relationship has effectively supported English learners and migrant families to access our resources and learn about the benefits of homeownership.

Typically, Homebuyers are partnered with NAHFH for one year prior to purchasing their home. During this time, homebuyers help to build their homes alongside Habitat staff and volunteers, and they participate in homebuyer and financial education courses. These practices help to create lasting homeownership. To provide financial and homeownership education, NAHFH partners with the Housing Authority of Yamhill County.

This project also creates community through volunteer opportunities. NAHFH utilizes volunteers on the construction site, in planning, and for events that benefit the project. NAHFH's Volunteer Program has a reputation of being a safe place for local communities of color and connects community members for a common cause: advancing affordable homeownership.

NAHFH receives support for a variety of funders. Most notably, this project is utilizing funds from Oregon Housing and Community Services' Local Innovation and Fast Track Homeownership Fund. Locally, NAHFH is financially supported by Yamhill Community Care and Oregon Realtors HOME Foundation, among others.

The project utilizes already existing resources in effective and innovative ways. The project shall not duplicate services provided by another organization.

NAHFH is an independent nonprofit organization that is part of the Habitat for Humanity network. There are 24 independent Habitat for Humanity affiliates in the Oregon network, with 20 serving rural communities. No two Habitat affiliate service areas overlap, to not duplicate resources. Habitat affiliates consistently share best practices and resources with the cumulative goal of increasing affordable housing availability for underserved populations. Over the decades of affordable home development in Oregon, financing the development, streamlining the development process, and replicating designs has increased our organization's efficiency.

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.

Since 1995, NAHFH has built, rehabilitated, moved or recycled 30 homes for low-income first-time homebuyers. Since NAHFH began a home repair program in 2010, we have completed 104 repair projects and successfully referred 66 more projects to the appropriate contractor, helping low-income homeowners to continue living in their homes. Families and individuals partnered with NAHFH for homeownership build their homes alongside staff and volunteers, and participate in pre-mortgage financial and homebuyer education to create lasting homeownership.

To ensure competitive pricing and to prevent delays, Habitat works with several contractors and vendors for any given product. Through these parameters, Habitat has had a long history of working with minority and women-owned businesses. As funds and building resources are raised locally, these are small businesses operating in rural areas where Habitat homes are built. We encourage minority owned companies to submit bids through advertising to our culturally responsive partners. This practice is how NAHFH builds relationships with MWESB firms in Newberg and surrounding communities. NAHFH has utilized several COBID-certified firms for work on multiple Home Repair Program projects.

The budget and timeline are thorough and realistic (evidence of construction and/ or service costs required with application).

The project budget is based off NAHFH's extensive experience in planning and estimating the development costs of homes in Newberg. NAHFH owns the College Street project site. The budget for development and construction costs was developed based on actual costs of comparable homes completed and sold in their service area during recent years. Once site work is complete, we estimate that the homes will take eight months to complete. We budgeted for labor and equipment accordingly.



CONSTRUCTION BUDGET 2024

ITEM	3-BR/2 BA BUDGET
Appliances	3,200.00
Cabinets	4,500.00
Deck/Porch	2,500.00
Doors	7,000.00
Driveway	1,800.00
Drywall	7,500.00
Electrical	8,500.00
Electricity	800.00
Flooring	8,800.00
Foundation	10,000.00
Framing	15,000.00
Garage	1,800.00
Gutters	900.00
Heating/Ducting	6,500.00
Insulation	6,200.00
Landscape	900.00
Painting	2,200.00
Plumbing	10,900.00
Roof	8,000.00
Roof Truss	6,500.00
Sanitation	1400.00
Siding	5,900.00
Site Prep	7,000.00
Trim	2,900.00
Water/Sewer	3900
Windows	4,200.00

TOTAL: 138,800.00
 \$ per SF 1200 \$ 115.67

Attachment 6

**Resolution No. 2021-3730 A Resolution Amending Policies and Procedures for
Administration of the City of Newberg's Affordable Housing Trust Fund (Membership)
and Repealing Resolution No. 2018-3457**

A RESOLUTION AMENDING POLICIES AND PROCEDURES FOR ADMINISTRATION OF THE CITY OF NEWBERG'S AFFORDABLE HOUSING TRUST FUND (MEMBERSHIP) AND REPEALING RESOLUTION NO. 2018-3457

RECITALS:

1. On May 4, 2009, the Newberg City Council adopted Resolution No. 2009-2843 accepting the Newberg Affordable Housing Action Plan.
2. On February 23, 2011, the Newberg Affordable Housing Action Committee recommended that the Newberg City Council adopt an affordable housing trust fund and adopt policies and procedures for administration of the fund.
3. On March 15, 2012, the Newberg City Council passed Ordinance No. 2012-2749 establishing the Newberg Affordable Housing Trust Fund, to keep our community diverse and healthy by facilitating the production and preservation of affordable housing throughout Newberg.
4. On April 16, 2012, the Newberg City Council adopted Resolution No. 2012-2988 establishing Policies and Procedures for Administration of the Newberg Affordable Housing Trust Fund.
5. On June 15, 2015, the Newberg City Council repealed Resolution No. 2012-2988 and adopted Resolution No. 2015-3202 amending adopted Policies and Procedures for Administration of the Newberg Affordable Housing Trust Fund.
6. On August 17, 2015 the Newberg City Council repealed Resolution No. 2015-3202 and adopted Resolution No. 2015-3211 amending adopted Policies and Procedures for Administration of the Newberg Affordable Housing Trust Fund.
7. On August 15, 2016 the Newberg City Council repealed Resolution No. 2015-3211 and adopted Resolution No. 2016-3306 amending adopted Policies and Procedures for Administration of the Newberg Affordable Housing Trust Fund.
8. On April 16, 2018 the Newberg City Council repealed Resolution No. 2016-3306 and adopted Resolution No. 2018-3457 amending adopted Policies and Procedures for Administration of the Newberg Affordable Housing Trust Fund.
7. On February 18, 2020, the Newberg City Council established a goal of housing affordability such as houselessness, transitional housing, workforce housing. In 2021, the Council formed a Council subcommittee to work on committee system review for improving the process. The subcommittee met on February 10, and February 24, 2021 and directed staff to address the issue of the Affordable Housing Commission's membership.

THE CITY OF NEWBERG RESOLVES AS FOLLOWS:

1. Resolution No 2018-3457 is repealed.
2. Resolution No. 2021-3728 is adopted as follows:

SECTION 1. Purpose

- 1.1 The purpose of the Newberg Affordable Housing Trust Fund (NAHTF) is to support the development, preservation, and rehabilitation of housing that is affordable to the citizens of Newberg with incomes that do not exceed 80% of the area median income. The NAHTF will have a dedicated source of revenue to provide ongoing funding for housing projects or programs that address the housing needs of these Newberg residents. 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.
- 1.2 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.
- 1.3 Understanding the high cost of housing regionally, it is evident that very low, low, and moderate - income households are not being served by the housing market. To address the disparity between the cost of housing and the means of resident household to afford housing, the Newberg Affordable Housing Trust Fund aims to provide direct financial support to projects that retain or increase the supply of needed housing for households earning less than 80% the area median income, which is to be defined through income limits established by the U.S. Department of Housing and Urban Development for Yamhill County, Oregon.
- 1.4 The administrative procedures associated with the Newberg Affordable Housing Trust Fund, including fund administration, determination of eligible applicants, eligible uses and activities, award preferences, eligibility criteria, award process, and selection criteria are hereby established.

SECTION 2. Eligible Applicants

- 2.1 The Newberg Affordable Housing Trust Fund is structured to ensure that many different types of organizations and persons are eligible to receive funds.
- 2.2 Eligible applicants include governmental subdivisions, community development corporations, local housing authorities, community action agencies, community-based or neighborhood-based non-profit housing organizations, other non-profit organizations, for-profit entities and private employers, and private landlords.

SECTION 3. Eligible Uses and Activities

- 3.1** Newberg Affordable Housing Trust Funds shall support the creation or preservation of housing that is affordable to households with incomes that do not exceed 80% of the area median income, as established by the most current U.S. Department of Housing and Urban Development for Yamhill County, Oregon, as determined by the Community Development Director.
- 3.2** Newberg Affordable Housing Trust Funds will be limited to those activities that create, preserve or acquire housing within the Newberg city limits.
- 3.3** Housing developments financed by the NAHTF which receive subsidy, financing, tax credits or other assistance under a State or Federal housing programs, may contain market rate units insofar as permissible under those programs and/or to the extent that they are necessary to support the creation of and/or ongoing sustainability of the affordable housing units in the development. However, Newberg Affordable Housing Trust Funds may not be used to support such market rate units.
- 3.4** Affordable housing units developed utilizing subsidy from the Newberg Affordable Housing Trust Fund shall comply with the income and housing cost limits established by Newberg Municipal Code Section 15.242.030, as amended, and as restricted by a contract prepared by the City of Newberg. The city council reserves the right to make exceptions to the standards established by Newberg Municipal Code Section 15.242.030 for proposed projects it wishes to support and deems further the provision of affordable housing within the community.
- 3.5** The Newberg Affordable Housing Trust Funds can be provided as either a grant or a loan depending on the project or program receiving funding. To retain a significant degree of flexibility, the eligible uses have a broad application including the following:
- 3.5.a Acquisition and construction of new affordable housing.** Eligible acquisition and construction costs include reasonable costs associated with building or land purchase, including but not limited to:
- Purchase price
 - Option costs
 - Financing fees including but not limited to the recording of trust deeds and promissory notes, title searches, and other third party costs related to securing the loan.
 - Appraisal costs
 - Closing costs
 - Inspection fees
 - Title insurance
 - Relocation costs
 - Architectural/engineering fees
 - Permit fees
 - System development charges
 - Construction costs
- 3.5.b Conservation** of energy through the use of “green” technologies provided that the benefits of the energy savings is passed on in the form of reduced costs to the qualified occupants of the affordable housing.

- 3.5.c Land banking** to include the purchase of land to be dedicated toward the development of affordable housing in the near or long-term.
- 3.5.d Predevelopment activities** undertaken by a community development organization in support of the development of affordable housing including planning, architectural services, engineering services, landscape design, legal services, surveys, appraisals, site clearance and demolition, environmental clearance, permit application fees and system development charges. Grant funding for these types of activities may be required to convert to a loan if the project receives full funding. For-profit developers are not eligible to apply for Newberg's Affordable Housing Trust Funds to assist with predevelopment costs.
- 3.5.e Bridge loans** to assist in development of affordable housing (for rental or owner occupancy). Bridge loans are intended to provide funding to permit housing projects to proceed in advance of the availability of permanent project funding. Bridge loan funding is available for acquisition or construction activities.
- 3.5.f Capacity building** for non-profit affordable housing providers in the form of direct grant awards to fund administration of an affordable housing project or program.
- 3.5.g Rehabilitation and emergency repairs** as part of an established program to secure units as affordable or to provide direct benefits to existing very low to moderate income households.

Eligible rehabilitation and emergency repair costs include but are not limited to:

- Architectural/engineering fees
 - Consultations
 - Construction costs
 - Relocation costs
 - Financing fees including but not limited to the recording of trust deeds and promissory notes, title searches, and other third party costs related to securing the loan.
 - Hazardous materials abatement including lead based paint noticing consistent with the Federal Lead Safe Housing Regulations HUD requirements at 24 CFR §35
- 3.5.h Direct benefits** to very low to moderate income households through an established program including down payment assistance, rental assistance, mortgage foreclosure prevention, emergency housing vouchers, homeownership training, renter education, or other programs intended to increase housing opportunities for Newberg's low to moderate income residents.
- 3.5.i Transitional and emergency housing** for homeless individuals and families through an established program to move people toward self-sufficiency.
- 3.5.j Educational programs and services** for potential home owners and renters.
- 3.5.k Other uses as deemed appropriate** by the Newberg City Council as supporting the development or preservation of affordable housing within the City of Newberg.

- 3.5.1. Manufactured home rehabilitation and repair** as part of an established program to secure units as affordable or to provide direct benefits to existing very low to moderate income households.

Eligible rehabilitation and emergency repair costs include but are not limited to:

- Architectural/engineering fees
- Consultations
- Construction costs
- Relocation costs
- Financing fees including but not limited to the recording of trust deeds and promissory notes, title searches, and other third party costs related to securing the loan.
- Hazardous materials abatement including lead based paint noticing consistent with the Federal Lead Safe Housing Regulations HUD requirements at 24 CFR §35

SECTION 4. Program Goals

- 4.1** To help maintain the effectiveness and long-term viability of the NAHTF, preference will be given to the provision of loans over grants. General criteria of project selection are found in Section 8 of this resolution. In no particular order, the following preferences are provided as general guidance for future applicants for Newberg Affordable Housing Trust Funds.
- 4.1.a** Developments that produce new affordable housing units. New affordable housing units shall include housing units constructed where none had existed previously, abandoned or fire-damaged residential units to be returned to residential use, and non-residential or mixed-use projects in non-residentially-zoned property. Any designated new affordable housing units shall be secured as affordable for future use through the recording of an appropriate legal instrument approved by the city attorney.
- 4.1.b** Developments that provide new affordability. New affordability refers to existing housing where a new level of affordability is provided that does not currently exist. This could occur in rental or ownership housing where the number of affordable units is increased, where a portion of existing units will be made affordable to households at income levels substantially lower than the units previously served, or where the term of affordability on the units will be extended for a period of at least twenty-five (25) years.
- 4.1.c** Developments that improve the energy efficiency and safety of existing affordable housing stock while maintaining affordability of the units.
- 4.1.d** Developments of housing utilizing the land trust model to secure property and perpetual affordability.
- 4.1.e** Developments that include joint ventures between multiple non-profit developers and/or for profit developers, working in partnership, to complete an affordable housing project.
- 4.1.f** Developments that include a joint venture between service providers and non-profit affordable housing developers to create projects that contain additional benefits to low

income individuals in the development of the project, or additional services for the resident upon completion.

- 4.1.g Developments that incorporate the use of “green” building materials, use of energy-efficient appliances, low-water use landscaping, and reduced storm water runoff. In addition, developments that incorporate building design and operational factors that minimize energy use and resource consumption as well as avoid indoor health impact.
- 4.1.h Developments that include affordable units for the disabled and the homeless.
- 4.1.i Projects that propose long-term affordability.
- 4.1.j Projects that are sponsored by non-profit organizations.
- 4.1.k Projects that use private funding sources and State funding sources to leverage the least amount of Newberg's Affordable Housing Trust Funds.

SECTION 5. Fund Administration

The Newberg Affordable Housing Trust Fund (NAHTF) originated through the direction of the Newberg City Council.

- 5.1 The City of Newberg acts as fiduciary agent and administrator of the funds. The city reserves the right to contract certain tasks to most effectively and efficiently achieve its administrative duties.
- 5.2 Funds dedicated to the Newberg Affordable Housing Trust Fund shall be exclusively reserved to support the eligible uses activities identified in Section 3, and shall not be used for the general operation of the city.
- 5.3 The City of Newberg shall accept requests for funding from the NAHTF's Time Sensitive Loan Program from eligible applicants at any time in order to accommodate affordable housing project opportunities that are time sensitive. Coordination with other private and government funding application timelines will help ensure that NAHTF funds are best applied to leverage additional resources in support of the housing projects. Project submittals deemed not time-sensitive will not be approved, but the applicant will be encouraged to submit their proposal to the annual request for proposals (RFP) funding process under the NAHTF's Competitive Awards Program. Also, eligible applicants may submit proposals to the NAHTF's Rental Rehabilitation Loan Program at any time.
- 5.4 The City of Newberg shall annually issue a notice of funding available (NOFA) to announce the availability of funds. The City shall also issue a request for proposals (RFP) for affordable housing projects that are not time sensitive.
- 5.5 As a target in any given year, up to 60 percent of the NAHTF will be available for project loans and up to 25 percent will be available for project grants. The remaining 15 percent of the NAHTF will be available for project contingencies through grants and/or loans.
- 5.6 In any given year, at least 50% of the available funds within the NAHTF shall be available for use through the competitive awards program. In any given year, the city council may make an exception

to this standard to take advantage of affordable housing opportunities.

5.7 The City of Newberg shall form an Affordable Housing Commission (AHC) that consists of five members and one Ex Officio non-voting member appointed by the Mayor with the consent of the city council. Membership of the commission should reflect representative broad interests regarding affordable housing in the community. The Mayor or Council designee shall recommend appointment of a student from a local high school or college as a non-voting Ex-Officio member. Members and the Ex-Officio member of the commission shall be appointed by the established procedures of the City Council. Terms will be for three years based on a calendar year, with staggered appointments. The student Ex-Officio terms will be for one year. The term of each member shall continue until their successors are appointed. There will be a limit of two consecutive terms.

The commission shall review applications for Newberg Affordable Housing Trust Funds to determine project eligibility and evaluate the applications based on the selection criteria. The commission shall provide recommendations to the city council who shall make final award decisions. In addition, the commission shall meet annually to prepare the NAHTF's annual NOFA and RFP for consideration of approval by the city council. Otherwise, the commission will meet as necessary during the year. The commission will meet as needed to advise the City on matters concerning housing affordability such as houselessness, transitional housing, workforce housing.

- 5.8** Newberg Affordable Housing Trust Funds will be allocated in a manner consistent with the threshold criteria provided Section 8, and consistent with state and local public contracting law.
- 5.9** Grant monies received into the NAHTF will have five percent of those monies reserved for administration.

SECTION 6. Match Requirements

- 6.1** The Newberg Affordable Housing Trust Fund is intended to support the development of needed housing. In addition, the City of Newberg believes that projects can become stronger and more successful through the partnership of many organizations. Therefore, the following match requirements apply to projects utilizing grants from the NAHTF.
- 6.1.a** The Newberg Affordable Housing Trust Fund grant contribution shall not exceed 50% of the total project or program cost. Required match can be met utilizing government funding, direct contribution from the applicant, private donations, and the contribution of land, materials or labor to the project.
- 6.1.b** In the case that land previously owned by the applicant is considered as required match, the value of the land shall be determined by a city approved certified appraisal completed by the applicant or real market value from the Yamhill County assessor office provided by the applicant, unless otherwise directed in Oregon Revised Statute or Newberg Municipal Code.
- 6.1.c** The valuation of land, and available equity to be considered as matching funds, shall be verified by the city prior to the disbursement of an NAHTF grant when its value is considered as required matching funds.
- 6.1.d** Donated materials and labor, which are proposed as required match through the development

of a project shall have their value estimated at the time of application. The actual value of these contributions is subject to verification by the city at completion of the project.

6.1.e Award recipients shall provide verifiable accounting for donated labor and materials, when such was necessary to satisfy the NAHTF match requirements.

6.1.f If a recipient of an NAHTF grant has been deemed by the city to have failed to have fulfilled all the necessary grant award match requirements, the city may require a full or partial repayment of any NAHTF grants awarded to a project.

6.2 Approved loans provided by the NAHTF may cover up to 80% of a project's costs. Required match can be met utilizing government funding, direct contribution from the applicant, private donations, and the contribution of land, materials or labor to the project.

SECTION 7. Allocation of Funds

The Newberg Affordable Housing Trust Fund is structured to allow flexibility for the city and housing providers. The establishment of four distinct and separate award processes is intended to provide for both consistency and flexibility of the NAHTF program. Annually, the city shall issue a notice of funding availability (NOFA), announcing the availability of funds in the following year and the types of programs. The city shall issue the NOFA for the year through publication in the Newberg Graphic and on the city's website. The NOFA shall be issued on or near July 1st of the year.

First, there is the competitive awards program. Annually, the city will issue a request for proposals for affordable housing projects of a non-time sensitive nature. Proposals awarded funding through the RFP process shall be done through a competitive basis. Loans and/or grants may be awarded through this program.

Second, there is the time sensitive program. Through this program, applicants requesting funding from the NAHTF may submit requests at any time in the year to accommodate affordable housing project opportunities that are time sensitive. Coordination with other private and government funding application timelines will help ensure that NAHTF funds are best applied to leverage additional resources in support of the housing projects. Loans and/or grants may be awarded through this program.

Third, there is the rehabilitation program. This program is intended to assist private property owners with rental rehabilitation projects or homeowners with rehabilitation projects. Applications for this program may be submitted at any time and need not be considered under the competitive awards program. Applicants seeking funding assistance must be willing to enter into a contractual agreement with the city that will ensure the future affordability of the project units for a specific period of time. Only loans will be awarded through this program.

Fourth, there is the manufactured home rehabilitation and repair grant program. This program is intended to grant NAHTF monies to local non-profit organizations so they can rehabilitate and repair dwellings and make them safe and decent for rental or ownership by low or very low income families. Applications for this program may be submitted at any time and need not be considered under the competitive awards program. Applicants seeking funding assistance must be willing to enter into a grant agreement with the city.

The distribution of any and all NAHTF funds through competitive or non-competitive awards, as described in Sections 7.1 through 7.3, will be in accordance with state and local public contracting laws.

7.1 Competitive Awards Program

The City of Newberg has a limited amount of Newberg Affordable Housing Trust Funds to use each year in comparison to the scope of the housing needs within the community. As a result, it is essential that the funds are used to meet the city's priorities in an efficient and cost-effective manner. To this end, a competitive award process uses a set of award criteria to evaluate proposals received through a request for proposals (RFP) process in terms of how they address the specific priorities outlined in the annual RFP.

The steps for making the competitive grant awards or loans are outlined below.

- 7.1.a** The City of Newberg may issue an RFP Request for proposals on an annual basis depending on availability of funds, providing applicants with a minimum of 45 days to respond to the request. The RFP shall be issued on or near July 1st of the year.
- 7.1.b** City staff shall assess the project proposals to determine if the eligibility criteria are met and shall develop a recommendation to provide to the Newberg Affordable Housing Commission and the city council.
- 7.1.c** The Newberg Affordable Housing Commission will provide applicants the opportunity to make a presentation on their project proposal and provide community members the opportunity to comment by holding a public meeting.
- 7.1.d** The Newberg Affordable Housing Commission will develop an award recommendation to the city council using the NAHTF criteria to determine which projects best meet the city's spending priorities. Each application will be rated on a numeric scale as established in the annual RFP for each criterion of selection (Section 8).
- 7.1.e** The Newberg city council shall make a final decision on the award of Newberg Affordable Housing Trust Funds.
- 7.1.f** The City of Newberg shall prepare an agreement between the city and the award recipient. The agreement shall outline the conditions of award and shall be executed prior to the disbursement of any Newberg Affordable Housing Trust Funds.
- 7.1.g** An award granted to an applicant may be rescinded by the city if the applicant does not initiate the activities identified in response to the RFP in advance of the City's issuance of another RFP.

7.2 Time Sensitive Loan or Grant Program

The City of Newberg recognizes that the nature of affordable housing development is often opportunity driven and time sensitive. Through this program, applications may be submitted at any time during a given year. When applications are received, the city shall review them to determine if the applications meet the city's threshold criteria. If the criteria are met, then the funds may be awarded to, or reserved for, the applicant. Funds available through this process are awarded on a first come, first served basis.

- 7.2.a** Project Eligibility. Projects are eligible to utilize funds for activities listed in Section 3.
- 7.2.b** Project Security. Applicant must demonstrate and commit sufficient collateral to ensure the security of the loan. Security shall be demonstrated based upon an 80% loan to value ratio based upon the most current County Assessor records, unless otherwise recommended by the NAHC and approved by the City Council. Loans shall be secured via recording of a Trust Deed and Promissory Note against the property.
- 7.2.c** Loan Terms.
- (1) Loan amounts will be determined by the proposed project need and amount available within the NAHTF.
 - (2) The standard interest rate is two percent (2%) below the prime rate.
 - (3) The standard term of the loan is two years.
 - (4) The applicant shall pay a loan processing fee equal to one percent (1%) of the loan or \$100.00, whichever is greater.
 - (5) Standard loan terms may be modified by approval of the City Council.
 - (6) The applicant shall enter into an agreement guaranteeing the dwellings will only be occupied by families or individuals meeting the income guidelines.
 - (7) The applicant will be required to pay for all financing fees including but not limited to recording of trust deeds and promissory notes, title searches, and other third party costs related to securing the loan.
- 7.2.d** Process.
- (1) The city manager shall appoint a loan officer to process loan applications.
 - (2) The loan officer will prepare application specifications.
 - (3) The loan officer will review applications for eligibility, and qualify applicants as either standard or preferred applicants. The loan officer may establish a priority for awarding of qualified loans.
 - (4) Prior to awarding any loan, the application will be forwarded to the Newberg Affordable Housing Commission for consideration of recommendation for approval by the Newberg city council.
 - (5) The loan officer shall prepare the necessary documents and agreements to execute and provide for repayment of the loan.

7.3 Rehabilitation Loan Program

7.3.a Purpose

The purpose of the rehabilitation loan program is to loan NAHTF monies to local landlords or homeowners so they can rehabilitate dwellings and make them safe and decent for rental or ownership by low or very low income families.

7.3.b Eligibility

- (1) The dwelling must be within the Newberg city limits.
- (2) The dwelling must be rented to low or very low income families or individuals, or owned by low to very low income families according to income guidelines established by the Affordable Housing Commission. Preference will be given to units

to be rented to very low income families or individuals.

- (3) Repairs shall improve the overall livability of the dwelling by addressing health and safety issues and by making the home more energy efficient and affordable. Priority is placed on the repairs needed to make the home safe and to prevent further deterioration and escalated costs if left unattended. Typical examples of these projects include new roofs, new windows, new electrical wiring, heating system repair/replacement, and utility repairs.
- (4) The applicant shall demonstrate sufficient equity in the property and sufficient ability to repay the loan.
- (5) The applicant shall demonstrate that the rehabilitation could not be accomplished using conventional loan programs.
- (6) Preference shall be given to landlords who live in Newberg or the Newberg area, and who own 10 or fewer rental units, and who own the property outright or have substantial equity in the property.

7.3.c Project Security. Applicant must demonstrate and commit sufficient collateral to ensure the security of the loan. Security shall be demonstrated based upon an 80% loan to value ratio based upon the most current County Assessor records, unless otherwise recommended by the NAHC and approved by the City Council. Loans shall be secured via recording of a Trust Deed and Promissory Note against the property.

7.3.d. Loan Terms

- (1) Loans are available in amounts ranging between \$5,000.00 and \$15,000.00. This amount may be increased up to \$25,000.00 if the need for repairs is justified, if the Newberg Affordable Housing Commission recommends the City Council increase the loan amount, and if adequate equity is established.
- (2) The standard interest rate is two percent (2%) below the prime rate.
- (3) The standard term of the loan is five (5) years.
- (4) The applicant shall pay a loan processing fee equal to one percent (1 %) of the loan or \$100.00, whichever is greater.
- (5) Standard loan terms may be modified by approval of the city council.
- (6) The applicant shall enter into an agreement guaranteeing the dwellings will only be occupied by families or individuals meeting the income guidelines for the loan term.
- (7) The applicant will be required to pay for all financing fees including but not limited to recording of trust deeds and promissory notes, title searches, and other third party costs related to securing the loan.

7.3.e Process

- (1) The city manager shall appoint a loan officer to process loan applications.
- (2) The loan officer will prepare application specifications. The loan officer will receive applications by a date specified in the notice of funding availability. The loan officer will accept applications after that date if funding remains available, and may establish a waiting list for applications in future funding cycles.
- (3) The loan officer will review applications for eligibility, and qualify applicants as either standard or preferred applicants. The loan officer may establish a priority for awarding of qualified loans.
- (4) Prior to awarding any loan, the application will be forwarded to the Affordable Housing Commission for consideration of recommendation for approval by the

Newberg city council.

- (5) The loan officer shall prepare the necessary documents and agreements to execute and provide for repayment of the loan.
- (6) The applicant shall complete all repairs within one year of loan award.

7.4 Manufactured Home Rehabilitation and Repair Grant Program

7.4.a Purpose

The purpose of the manufactured home rehabilitation and repair grant program is to grant NAHTF monies to individuals or local non-profit organizations so they can rehabilitate and repair dwellings and make them safe and decent for rental or ownership to low or very low income families.

7.4.b Eligibility

- (1) The dwelling must be within the Newberg city limits.
- (2) The dwelling must be rented to low or very low income families or individuals, or owned by low to very low income families according to income guidelines established by the Affordable Housing Commission. Preference will be given to units to very low income families or individuals.
- (3) Repairs shall improve the overall livability of the dwelling by addressing health and safety issues and by making the home more energy efficient and affordable. Priority is placed on the repairs needed to make the home safe and to prevent further deterioration and escalated costs if left unattended. Typical examples of these projects include new roofs, new windows, new electrical wiring, heating system repair/replacement, and utility repairs.
- (4) The applicant shall demonstrate sufficient matching funds according to guidelines established by the Affordable Housing Commission.
- (5) The applicant shall demonstrate that the rehabilitation and repair could not be accomplished using conventional loan programs.

7.4.c Project Match. Applicant must demonstrate and commit sufficient matching funds to secure the grant. Matching funds shall be based on a minimum one-third of the project costs, unless otherwise recommended by the NAHC and approved by the City Council. The maximum NAHTF grant amount is 50% of the project cost.

7.4.d. Grant Terms

- (1) Grants are available in amounts ranging between \$200.00 and \$1,000.00.
- (2) Grants may be for multiple projects under the manufactured home rehabilitation and repair program. Grants are available up to \$10,000.00 for multiple projects. This amount may be increased up to \$12,000.00 if the need for repairs is justified, if the Newberg Affordable Housing Commission recommends the City Council increase the grant amount, and if adequate matching funds are established.
- (3) The applicant shall enter into an agreement guaranteeing the manufactured homes will only be occupied by families or individuals meeting the income guidelines for the grant for five years.

7.4.e. Process

- (1) City staff shall assess the project proposals to determine if the eligibility criteria are met and shall develop a recommendation to provide to the Newberg Affordable Housing Commission and the city council.
- (2) The Newberg Affordable Housing Commission will provide applicants the opportunity to make a presentation on their project proposal and provide community members the opportunity to comment by holding a public meeting.
- (3) The Newberg Affordable Housing Commission will develop an award recommendation to the city council using the NAHTF eligibility criteria to determine which projects best meet the city's spending priorities. Each application will be rated on a numeric scale as established in criterion of selection (Section 8).
- (4) The Newberg city council shall make a final decision on the award of Newberg Affordable Housing Trust Funds.
- (5) The City of Newberg shall prepare an agreement between the city and the grant award recipient. The agreement shall outline the conditions of award and shall be executed prior to the disbursement of any Newberg Affordable Housing Trust Funds.
- (6) An award granted to an applicant may be rescinded by the city if the applicant does not initiate the activities identified in grant request.
- (7) The applicant shall complete all rehabilitation and repairs within one year of grant award.

SECTION 8. NAHTF Competitive Grant or Loan Award Threshold and Selection Criteria

- 8.1** The project is considered an eligible use or activity under Section 3, and benefits households earning less than 80% the area median income (threshold verification).
- 8.2** 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).
- 8.3** Newberg Affordable Housing Trust Funds shall be limited to the minimum amount necessary to complete the project. The lower the percentage of NAHTF funds requested, relative to the full project costs, the higher ranking the project shall be given.
- 8.4** The project addresses the unmet housing needs as identified in the Housing Element of the Newberg Comprehensive Plan.
- 8.5** The lower the income level that is targeted for the benefitting households, the higher the ranking the project shall be given.
- 8.6** The project provides new affordable housing, or new affordability, through retention or rehabilitation of existing housing, within the city. The greater the number of units provided, the higher the ranking the project shall be given.
- 8.7** 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.
- 8.8** The project addresses energy conservation through the integration of green building technologies in new construction, or achieves greater energy efficiency through rehabilitation of existing housing.


- 8.9 The project maximizes partnerships in the community (volunteers, in-kind contributions, cash contributions, multiple organization involved, etc).
- 8.10 The project utilizes already existing resources in effective and innovative ways. The project shall not duplicate service provided by another organization.
- 8.11 The agency submitting the proposal has the capacity to carry out the project and has had demonstrated successes completing projects of similar scope.
- 8.12 The budget and timeline are thorough and realistic.
- 8.13 The project is ready for implementation.
- 8.14 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.
- 8.15 The 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.
- 8.16 The proposal demonstrates that Newberg Affordable Housing Trust Funds are the most appropriate funding source, and necessary, for the project.
- 8.17 Additional selection criteria may be developed and included in the annual RFP to best direct Newberg Affordable Housing Trust Funds toward an identified priority need. Numeric rankings for each of the selection criteria shall be incorporated into the annual RFP.

SECTION 9. Fund Revenue

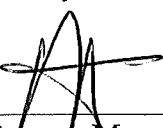
- 9.1 The city manager is directed to create a new budget department code within the existing Fund 14 for monies within the NAHTF. Monies within the budget under line 14-4120-602000, Housing Authority Loans, shall be placed in this new department code.
- 9.2 All new revenue brought into the NAHTF shall be done so with the approval of the city council.

➤ **EFFECTIVE DATE** of this resolution is the day after the adoption date, which is: April 6, 2021.

ADOPTED by the City Council of the City of Newberg, Oregon, this 5th day of April, 2021.


Sue Ryan, City Recorder

ATTEST by the Mayor this 8th day of April, 2021.


Rick Rogers, Mayor