

# OREGON STATE HOUSING COUNCIL

July 13, 2012



*Kearney 2, Bend, OR*

*(6 Units; New Construction; Developmentally & Physically Disabled)*

Meeting held at:  
Oregon Housing and Community Services  
725 Summer Street NE, Room 124 A/B  
Salem, OR 97301  
503.986.2005

# OREGON STATE HOUSING COUNCIL

July 13, 2012

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# Oregon State Housing Council

725 Summer St NE Suite B  
Salem, OR 97301-1266  
(503) 986-2005  
(503) 986-2132 FAX  
(503) 986-2100 TTY  
www.oregon.gov/OHCS/OSHC



**Council Members**  
Jeana Woolley, Chair  
Mayra Arredola  
Tammy Baney  
Aubrey L. Dickson  
Michael C. Fieldman  
Zee D. Koza  
Adolph "Val" Valire, Jr.

## STATE HOUSING COUNCIL MEETING

**July 13, 2012**

**9:00 a.m.**

**Meeting Location:**

Oregon Housing and Community Services  
725 Summer Street NE, Room 124 A/B  
Salem, OR 97301  
(503.986.2005)

### AGENDA

- I. **CALL TO ORDER** Jeana Woolley
- II. **INTRODUCTION OF NEW COUNCIL MEMBERS** Margaret Van Vliet
- III. **ROLL CALL** Jeana Woolley
- IV. **APPROVAL OF MINUTES** Jeana Woolley
  - A. Minutes of May 4, 2012 Meeting
- V. **DIRECTOR'S REPORT** Margaret Van Vliet
- VI. **PUBLIC COMMENT** Jeana Woolley
- VII. **NEW BUSINESS**
  - A. Consolidated Funding Cycle
    - 1. *Overview* Margaret Van Vliet
    - 2. *Projects Awarded by OHCS – Informational Only* Margaret Van Vliet
    - 3. *Projects Recommended to State Housing Council* Karen Tolvstad  
Julie Cody
      - a. *Dethman Manor (Hood River, OR)*
      - b. *Greenview Terrace Apartments (Portland, OR)*
      - c. *Kehillah Housing (Portland, OR)*
      - d. *CSI GP.HM. Cornell Rd (Hillsboro, OR)*
      - e. *Farmington Meadows (Hillsboro, OR)*
      - f. *Harkson Court (Forest Grove, OR)*
      - g. *Juniper Gardens Apts. Phase 2 (Forest Grove, OR)*
      - h. *Deskins Commons (Newberg, OR)*
      - i. *Hyak (Seaside, OR)*
      - j. *Firestone Place (Dallas, OR)*
      - k. *The Jetty Apartments (Lincoln City, OR)*

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- l. *Applegate Apartments (Cottage Grove, OR)*
- m. *Camas Ridge Apartments (Roseburg, OR)*
- n. *Eagle Landing (Roseburg, OR)*
- o. *Hyde Park (Ashland, OR)*
- p. *Trail Apartments (Boardman, OR)*

**VIII. PUBLIC COMMENT**

**Jeana Woolley**

**IX. REPORT OF THE CHAIR**

**Jeana Woolley**

**X. FUTURE AGENDA ITEMS**

**Margaret Van Vliet**

- Single Family Bond Program (August)
- Agency Budget process (August)
- Future Funding Processes (August or September)

**OREGON STATE HOUSING COUNCIL**  
**Minutes of Meeting**

Meeting Location:  
Oregon Housing and Community Services  
725 Summer Street NE, Room 124 A/B  
Salem, OR 97301

**9:00 a.m.**  
**May 4, 2012**

**MEMBERS PRESENT**

John Epstein, Chair  
Tammy Baney  
Mike Fieldman  
Adolph "Val" Valfre, Jr.  
Jeana Woolley

**MEMBERS ABSENT**

**GUESTS**

Rob Prasch, Network for Affordable Housing  
Ryan Fisher, NW Public Affairs, LLC  
MaryBeth Beale, Habitat for Humanity  
Tom Cusack, Oregon Housing Blog  
Keith Wooden, Housing Works  
Jeff Puterbaugh, AMH, OHA  
Anna Geller, Geller Silvis & Associates, Inc.  
Martha McLennan, Northwest Housing Alternatives  
Sharon Nielson, The Nielson Group  
Greg Blackmore, City of Bend (via phone)

**STAFF PRESENT**

Margaret S. Van Vliet, Director  
Karen Tolvstad, Policy, Strategy & Community Engagement Division Administrator  
Julie Cody, Program Delivery Division Administrator  
Bruce Buchanan, Regional Advisor to the Department (via phone)  
Debbie Price, Regional Advisor to the Department (via phone)  
Karen Chase, Regional Advisor to the Department  
Karen Clearwater, Regional Advisor to the Department  
Vince Chiotti, Regional Advisor to the Department  
Shelly Cullin, Senior Loan Officer  
Roberto Franco, Single Family Program Manager  
Ben Pray, Policy Advisor and Communications Manager  
Betty Markey, Senior Policy Advisor  
Bill Carpenter, Information Technology Manager  
Heather Pate, Multifamily Finance and Resource Manager  
Jo Rawlins, Recorder

**I. CALL TO ORDER: Chair Epstein calls the May 4, 2012 meeting to order at 9:05 a.m.**

**II. ROLL CALL: Chair Epstein asks for roll call. Present: Mike Fieldman, Adolph "Val" Valfre, Jr., Jeana Woolley and Chair Epstein. Absent: Tammy Baney (arrived at 9:15).**

**III. APPROVAL OF MINUTES**

**A. Chair Epstein asks if there are any corrections to the April 6, 2012 Minutes. There being no corrections, the Motion was read:**

**MOTION: Valfre moves that the Housing Council approve the Minutes of the April 6, 2012 Council meeting.**

**VOTE: In a roll call vote the motion passes. Members Present: Mike Fieldman, Adolph "Val" Valfre, Jr., Jeana Woolley and Chair Epstein. Absent: Tammy Baney.**

1 **IV. DIRECTOR'S REPORT: Margaret Van Vliet, Director, reports the following:**

- 2 ● *OHSI.* More than \$52M has been spent on direct assistance. The MPA-U program is gaining  
3 steam and there is a lot of interest as slots are opened in the Metro area. There has been extra  
4 outreach in rural areas that are not using their designated slots. Some of the first payments on  
5 this program will go out this month. We are starting to see final payments from the first batch  
6 of the MPA program, because those individuals have been on the program and have received  
7 12 months of assistance. Preparation is under way to launch the next Preservation phase. This  
8 is the part of the program that helps pay for those who have arrearages, but are otherwise ready  
9 to assume their full mortgage payments. Work on the pilot projects in Jackson and Deschutes  
10 Counties is continuing. Eight deals under that program have closed, with homeowners  
11 realizing about \$100,000 in principal reduction. More reporting is being done online, so there  
12 is a lot of data available on the OHSI website.
- 13 ● *Multifamily.* Heather Pate and her team are spending many hours doing the first review of the  
14 50 applications that were submitted during the Consolidated Funding Cycle.
- 15 ● *Single Family.* All the funding from previous bond sales has been committed, so the  
16 department is preparing for another bond sale, which should close by the end of May. The  
17 department has access to about \$39M in the new issue bond program, which is the Treasury  
18 subsidized program at the federal level, and it is being structured to provide down payment  
19 assistance. A fuller report will be presented to Council at the June meeting.
- 20 ● *NSP3* is just about at the nine-month benchmark, and some good strides have been made in  
21 investing in foreclosed properties. Some of the program parameters need to be adjusted, and  
22 proposed changes were put out for public comment, with a lot of public comment received.  
23 Based on those comments, the department is going back to rethink how to redistribute those  
funds and perhaps modify the rules. By March of 2013, we need to have expended 50% of the  
\$5M, and we are now at about 36%.
- *National Foreclosure Mitigation Counseling Program.* The department received the sixth  
round of funding of \$430,000 that is funded by HUD. That money will be distributed through  
13 counseling agencies.
- *PBCA Contract.* The department is actively working on the NOFA that is due to HUD by  
June 11. The contract start date will be December 1. We are optimistic, based on the  
modifications HUD has made to the NOFA, that we will be the successful bidder.
- *Community Services.* Staff in the community services division is taking a deep and broad look  
at the various programs delivered by the department, trying to think about them in the context  
of the Governor's 10-Year Plan, and goals around aligning the programs to achieve the Healthy  
People policy visions. A good example is the weatherization programs operated by the agency,  
which are funded by stimulus (ARRA) dollars that will soon be coming to an end, requiring the  
need to realign staff duties due to the loss of some limited duration positions and staff.
- *State Housing Council Recruitments.* The Governor's Office is beginning the vetting process  
for those who applied. There is a particular emphasis on geographic, racial, and ethnic  
diversity. The confirmation process for new appointees will be later this month.

21 **Shelly Cullin**, Senior Loan Officer, announces that she will be retiring from state service the end of  
22 May, and wanted to say thank you and goodbye. She has been with the department for 21 years and a  
23 loan officer for the past 15 years. During those 15 years she has processed 131 loans, and produced  
over 7,900 units for \$456M worth of loans. In the last five years, her passion has been preservation.

1 She will start her new employment on June 1 with a developer that focuses on preservation. Council  
2 thanks her for her many years of service, especially for her work on preservation and credits her with  
3 that program's success.

4 **V. REPORT OF THE CHAIR:** Chair Epstein reports that following last month's Council  
5 meeting, there was a joint meeting with CAPO. One of the things talked about in that meeting was  
6 development of a joint letter from the two councils to the legislature regarding the proceeds from the  
7 banks relating to the foreclosure crisis. Ryan Fisher, who works with CAPO, volunteered to draft a  
8 letter and send it out for review. Van Vliet explains that there were two parallel, but distinct forces  
9 moving in the February legislative session. One was the passage of SB 1552, which requires that  
10 banks enter into mediation before proceeding with foreclosure. It also requires that homeowners,  
11 before asking to get into mediation, get some counseling services from a HUD certified counselor.  
12 The bill did not attach any money to those activities. Banks, servicers and homeowners will pay a  
13 small fee to access the mediation, which will offset some of the costs of the statewide mediation  
14 program. Separate from that was the multi-bank settlement. The amount of money that will come to  
15 Oregon that is unrestricted is \$29M. The legislature asked OHCS and DOJ to come back and tell them  
16 how they would spend some of the settlement money. A letter has been sent to the Legislative Fiscal  
17 Office and the Governor's Office setting out that OHCS and the Department of Justice would propose  
18 to allocate a piece of the \$29M settlement funds for a series of activities related to mediation, and  
19 outreach to homeowners who are struggling, so they can access the settlement and understand how to  
20 access the provisions of SB 1552, and any other assistance. The pre-mediation counseling would be  
21 provided by the expansion of the network of existing housing counselors. Legal assistance will also be  
22 necessary for some of the low-income homebuyers. A package has been put together asking the  
23 legislature to appropriate funds for those activities through the rest of the biennium. The dollars  
requested total \$9M. That leaves other resources out of that settlement and beyond this biennium as a  
question. It is in that context that CAPO and the Housing Council members wanted to make sure the  
rest of the funds stay for housing related, if not foreclosure related, purposes. Discussion followed and  
the following suggestions were given for inclusion in the joint letter:

- A broader tone to expand to affordable housing in general and to advocate for the funds not being pulled to some other activity.
- Acknowledge what is already being done and how there are still gaps that cannot be met.
- A broader spectrum focused on the broad range of needs.
- Frame the problem as it exists, despite everything that has been invested already.
- Focus on maintaining the \$29M in housing related issues.
- Talk about stability of housing and the ability to stay in a home, which lends itself to economic development, keeping jobs, and staying off other services.

19 It was agreed that the letter would be submitted to the subcommittees that will address how the money  
20 will be spent during Legislative Days scheduled for May 21-23. OHCS and DOJ will present a report  
21 on the proposal. Ryan Fisher says the \$9M request that Margaret spoke about is for one year, but he  
22 thinks what people have been looking at is the number of foreclosures and the length of time it will  
23 take to work people through the system, and they feel a three-year plan is best. The requests to the  
legislature on how to stretch the \$29M over a three-year plan will need to be done in stages. He says  
he has a concern about broadening the use of the funds beyond foreclosure-related issues. He believes  
it is a good idea to better frame the existing systems that are in place. This money is more flexible  
than the dollars in the OHSI program and can be used to plug the gaps.

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**VI. GUEST PRESENTATION:**

A. *Oregon's Preservation Initiative.* **Rob Prasch**, Preservation Director, Network for Oregon Affordable Housing, distributed a packet of information and comments that preservation has been a priority for the agency for many years, with five areas of focus: making information available; streamlining the processes; providing acquisition capital; providing technical assistance; and promoting green building practices. **Prasch** states that preservation is good policy because the units provide safe, decent homes for extremely low-income households. They provide security because residents pay 30% of their income. Preservation contains safeguards. Federal grants assist with payments for a 20-year period. Preservation costs average 53% of new construction costs. It is green and saves energy with upgrades and improvements. Buildings are already cited and close to neighborhoods, and there are no permitting, planning or zoning issues. Preservation is good at attracting private investors and lenders. **Woolley** says the real power of preservation is that today we cannot serve that population with new construction. These units are critical to a portfolio that is able to serve a full gamut of affordable housing needs. It is the easiest way for us to serve the very low-income. **Prasch** adds that often these are the only affordable housing offerings in an area. The residents are initially covered with vouchers, but one of the benefits to the residents of a voucher is the mobility of it. Project-based subsidy can also be leveraged versus tenant-based subsidies that cannot. **Epstein** asks if he would be making any further requests to the legislature this biennium. **Prasch** explains that the Housing Alliance will be putting together the agenda for next session. The last time the ask was for \$10M and the approval was for \$5M, with an invitation to come back in February, but that did not happen. Having an acquisition fund available could help fund projects until there are more resources available. **Van Vliet** says the department is not putting in any request as part of its budget or legislative concepts. The advocates have done that, but the department has been asked not to put in a capital request for lottery-backed bonds.

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**VII. NON-CFC PUBLIC COMMENTS:** **Anna Geller**, Geller Silvis and Associates, says she tries to take the point of view of a resident versus the point of view of the industry. It was illuminating to her when she helped residents pack to move to a new location during a rehab in Southern Oregon. They explained to her that preserving the building was essentially denying them a portable voucher. They could have moved to Portland to get away from an abusive husband, the drug culture, etc. It would have been those women's opportunity for housing with choice. **Geller** states that she thinks the Portland portfolio and other big portfolios are tremendously aggressive, but some of the other towns have different needs. If we are really trying to help low-income people and not the industry, that has to be examined. We have to consider how important housing choice is in changing someone's life. We need a good preservation program, but it needs to be done in a thoughtful manner.

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**VIII. COMMUNITY ENGAGEMENT UPDATE:**

A. *Influence on 2013 CFC Planning.* **Karen Tolvstad**, Policy, Strategy & Community Engagement Administrator, gives an update on the recent community engagement outreach the department has done with for profit and nonprofit developers, municipalities, cities and counties. They are hearing a lot of consistency from different individuals. The ultimate consistent piece of advice is to create a less burdensome and less costly process for making awards with greater transparency and clarity on the decision-making process. Specifically, there needs to be greater focus on needs of local communities, in contrast to what we know by creating a data measurement of need. Also, to provide more focus on what the community sees as their needs. A sharper focus on our priorities so that people can have greater certainty. The struggle the agency faces is in taking very well organized and funded priorities and weighing and measuring them against all needs throughout the state. They received comments from other developers about the 50% set aside for preservation. Most people

1 realize that preservation is important in the metro area. Points have been raised about the real risk of  
2 turning a project in a rural area. For 2013, taking all the feedback that has been received, they believe  
3 the best way to go forward is with an RFP-type process. The plan is to have a tax credit RFP about the  
4 same time of year as the current CFC. RFP criteria could be based on policy priorities or geography,  
5 or a combination. Once they have an opportunity to review all of the input received, a  
6 recommendation will be presented to Housing Council for next year's process.

7 **Woolley** asks for an explanation about the difference with an RFP process and what would be  
8 changing from the current CFC process. **Tolvstad** explains that the CFC process is done once a year  
9 and projects all over the state, regardless of geography or type of project, submit an application. The  
10 application process itself, because it includes every funding stream, is a combination of all of those  
11 requirements. Even for a person who is going after a particular funding stream, they must go through  
12 the entire process to apply. However, program requirements are very different if you are applying for  
13 tax credits versus if you are applying for HOME funds. Currently, there could be a high-rise on the  
14 MAX line in Portland, competing with a group home in Hermiston. For the decision-making process,  
15 we recommend grouping projects. It would be a more streamlined application and a decision-making  
16 process. Then the question is with different RFPs, whether you do them at the same time of year, or  
17 spread them out. She said there are many questions to consider and she will come back to Housing  
18 Council with the pros and cons. She thinks it will need to be rolled out in phases. At the next Council  
19 meeting she will talk about an RFP or NOFA for tax credit projects in the spring, which is the first  
20 priority. Council offered the following for consideration:

- 21 • **Fieldman:** There is an advantage to allocating resources all at once because it is all in front of  
22 you at one time. Tax credit projects could easily use up all the available resources and there  
23 would be nothing left, without a good, thoughtful way to allocate.
- **Woolley:** You might have different processes and criteria for different sized projects that are  
going after different funding streams.
- **Epstein:** You are also looking at internal resources. Spreading our resources to pay for those  
doing a one-time analysis versus spread out over the year. There is the issue of allocating it on  
projects and then six months later a worthwhile project comes along and you cannot fund it.
- **Baney:** Consider prioritization of projects from communities. Often there are different  
projects in the same geographic area essentially competing against one another.
- **Valfre:** His concerns are the capacity of the organization and whether or not the department  
can meet expectations of the customers. **Tolvstad** says they anticipate it may be easier to  
spread it out throughout the year. The drawback is reserving funds. What she has done to date  
is the research to identify what the community sees as the needs, problems, and issues, and to  
identify some potential solutions. Now the hard work of evaluating benefits and trade-offs of  
different options begins. **Van Vliet** comments that as they go through what Karen has for the  
current year process, they can also step back and it may inform them about next year.

19 **B. Proposed Criteria for 2012 Final Determinations.** **Karen Tolvstad**, Policy, Strategy &  
20 Community Engagement Administrator, distributes a chart of the Proposed Scoring Process for 2012  
21 CFC, and gives an overview of the three steps: Review by Housing Division Program Staff; Review  
22 by Management and Policy Team; and Final Determination and Recommendations to SHC by OHCS  
23 Executive Team and State Housing Council Members. **Woolley** asks how the depth of community  
support will be measured. **Tolvstad** says in two ways: One, by reviewing the application, including  
support letters and the narrative that the applicants are asked to complete. Second, by the RADs in the  
community that are giving input on the step-two review, and providing highlights of the projects. That  
information will be used in balance with the narratives and our own understanding of affordable  
housing regions in Oregon. **Woolley** asks if there will be any independent way to measure local

1 support on the ground. **Tolvstad** answers that as the department goes forward with redefining the role  
2 of the RADs, away from being involved with individual projects and helping applicants put their  
3 applications together, they will focus their efforts on deeply understanding the needs in the community  
4 and the communities' priorities. There is a published final tiebreaker policy. If they do end up with  
5 ties, that policy will be used to break those ties. **Woolley** points out that the need for the project will  
6 be very important. **Tolvstad** says this is all a learning process for helping them determine how to set  
7 up scoring criteria and decision-making for 2013. **Van Vliet** states that there will be an opportunity  
8 as they go forward to ask what the 10-Year Plan will call on us to do, and if we can get to a place  
9 where we are more prescriptive. **Fieldman** says there could be some unintended consequences of the  
10 process. If in fact the changing of the priorities and the scoring process leads to a result where  
11 everyone is tied, then it does change the emphasis and the focus of the funding to just those final  
12 points. The rating system that we had before did not lead to that many ties. **Tolvstad** says that is why  
13 project feasibility and merit are the number one priority in the final determination step. **Epstein** notes  
14 that currently, if someone is applying just for HOME funds, they have to go through the same cycle.  
15 Another advantage is having program allocations at different times of the year, for which different  
16 criteria would be created. **Fieldman** says that is the part he likes -- different processes for different  
17 types of projects.

18 **IX. PUBLIC COMMENT:** **Martha McLennan**, Executive Director of Northwest Housing  
19 Alternatives, says she has been following this process through the Oregon Opportunity Network, and  
20 they really appreciate being engaged in the process early on and are looking forward to being actively  
21 engaged in the process as the recommendations develop. There are a lot of challenges to scoring and  
22 having an allocation system. There are some things that they are excited to see shifting in emphasis.  
23 One is to be looking at the policy benefits of the project, the policy equation, and the public benefits it  
provides for the costs that it takes. The consistency that was talked about in terms of a public entity,  
warms her heart. The process of weighing and measuring is always going to be a challenge. She  
suggests they may want to think about, instead of having scores, to weigh things or have a yes/no  
answer. To look at things in a relative way. To stack the applications up one against the other and say  
in a particular realm which one did the best and then stack the rest underneath. Aggregate the scores  
from four or five different categories, which would provide greater variation and lessen the number of  
ties.

1 **Sharon Nielson**, from the Nielson Group, says she has been a consultant for over 25 years and has  
2 seen this process evolve over a very long time, and it is exciting to see the way this is being engaged  
3 now. She feels like this is not a rewrite of a process, but it is actually going to change the process. It  
4 absolutely has to. In reality, you will be requiring the sponsors and all of us to go back and structure  
5 and rethink what is really feasible. Not what the application wants, not what we think will score the  
6 best, but really what is actually needed, desired and wanted. She thinks we should take this  
7 opportunity and invite in other systemic partners and to pull funding streams from other places. If a  
8 project is supported by two CDCs that have a great track record, incentivize them to work together.  
9 Relationships need to be as sustainable as the facility itself. She commends the department for taking  
10 this on. It will be painful, but better for Oregon in the long run. **Woolley** asks her how it would be  
11 possible to incentivize cooperation among CDCs. **Nielson** suggests, for an RFP, to perhaps offer extra  
12 consideration to a group that came together. If a project could pull in funding from other areas, that  
13 could be an extra incentive. She believes the industry really needs to wean itself off the developer fee.  
14 CDCs have a mission to do housing. Perhaps they need to begin to look at their housing mission. Give  
15 incentives in terms of points for portfolio collaboration, cash flow in projects that are running well,  
16 repositioning CDCs in communities. Start looking at these projects as a social investment. There is  
17 money that is not being tapped into because of the way the deals have to be structured. **Fieldman** says

1 he agrees with what she has said and he thinks it is the direction to be headed. It seems to happen in  
2 rural areas very naturally. It is good business for organizations to collaborate to survive. In Roseburg,  
they collaborate and review each other's applications. Their goal is to bring housing to their area, not  
3 compete with each other. That way their community benefits. A paradigm shift needs to happen.

4 **X. FUTURE AGENDA ITEMS:**

- 5 a. Budget Process (June)
- 6 b. Single Family Programs Review (June)
- 7 c. RFP / NOFA for Tax Credit Projects

8 **Chair Epstein** adjourns the meeting at 11:37 a.m.

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**Jeana Woolley, Chair**  
**Oregon State Housing Council**

**DATE**

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**Margaret S. Van Vliet, Director** **DATE**  
**Oregon Housing & Community Services**

OHCS 2012 CFC REGIONAL AND SET ASIDE DISTRIBUTION  
FOR HOUSING COUNCIL

PROJECT NAME	CITY	REGION	SPONSOR	TRUST FUND	HOME	LIHTC	OAHTC	HELP	LIWP	TOTAL COSTS	TYPE	TOTAL UNITS
<b>URBAN/METRO</b>												
<b>Preservation</b>												
<b>Proposed</b>												
Hollyfield Village Apts	Lake Oswego	Metro	Northwest Housing Alternatives Inc	\$200,000	\$0	\$391,276	\$1,580,151	\$0	\$69,230	\$5,711,074	AR	30
Farmington Meadows	Albina	Metro	Guardian Affordable Housing Dev LLC	\$200,000	\$0	\$820,000	\$4,650,000	\$0	\$235,287	\$13,775,585	AR	69
			<b>PROPOSED:</b>	<b>\$400,000</b>	<b>\$0</b>	<b>\$1,211,276</b>	<b>\$6,230,151</b>	<b>\$0</b>	<b>\$304,517</b>	<b>\$19,486,659</b>		<b>99</b>
<b>Not Proposed</b>												
Viking Village II	Salem	Valley	Guardian Affordable Housing Dev LLC	\$200,000	\$0	\$511,366	\$600,000	\$0	\$116,266	\$5,637,312	AR	32
Viking Village I	Salem	Valley	Guardian Affordable Housing Dev LLC	\$200,000	\$0	\$820,000	\$1,010,000	\$0	\$180,276	\$9,085,677	AR	55
Village East Apts	Springfield	Valley	Guardian Affordable Housing Dev LLC	\$200,000	\$0	\$672,484	\$2,412,537	\$0	\$0	\$8,910,537	NCAR	42
			<b>TOTAL:</b>	<b>\$1,000,000</b>	<b>\$0</b>	<b>\$3,215,126</b>	<b>\$10,252,688</b>	<b>\$0</b>	<b>\$601,059</b>	<b>\$43,090,185</b>		<b>228</b>
			<b>AVAILABLE:</b>	<b>\$400,000</b>		<b>\$1,211,276</b>						
			<b>BALANCE:</b>	<b>\$0</b>		<b>\$0</b>						
<b>NC &amp; Non-Pres A/R</b>												
<b>Proposed</b>												
CSLGH Cornell Rd	Hillsboro	Metro	Community Services Inc	\$255,000	\$0	\$0	\$0	\$25,000	\$62,189	\$598,350	NCAR	1
Alma Gardens	Hillsboro	Metro	Northwest Housing Alternatives Inc	\$0	\$0	\$750,000	\$1,200,000	\$0	\$99,858	\$8,899,168	NC	45
Juniper Gardens Apts Ph 2	Forest Grove	Metro	Bienestar	\$500,000	\$0	\$0	\$0	\$0	\$0	\$5,585,286	NC	22
Hartson Court	Forest Grove	Metro	Accessible Living Inc	\$400,000	\$0	\$0	\$0	\$0	\$0	\$839,274	R	20
Lancaster Bridge Apts	Corvallis	Valley	Willamette Neighborhood Housing Svcs	\$0	\$0	\$618,559	\$1,250,345	\$0	\$0	\$8,296,485	AR	50
			<b>PROPOSED:</b>	<b>\$1,155,000</b>	<b>\$0</b>	<b>\$1,368,559</b>	<b>\$2,450,345</b>	<b>\$25,000</b>	<b>\$162,047</b>	<b>\$24,218,563</b>		<b>138</b>
<b>Not Proposed:</b>												
Parkway West	Salem	Valley	Housing Authority of the City of Salem	\$200,000	\$0	\$820,000	\$2,750,000	\$0	\$0	\$12,476,911	AR	78
Barcelona at Beaverton, The	Beaverton	Metro	Community Partners for Affordable Housing	\$50,000	\$0	\$820,000	\$1,200,000	\$0	\$50,000	\$10,274,408	NC	46
Bascom Village Phase I	Eugene	Valley	St Vincent de Paul Society of Lane Co	\$200,000	\$0	\$0	\$900,000	\$0	\$0	\$9,610,492	NC	53
Riverview Terrace Apts	Salem	Valley	Salem-Keizer CDC	\$0	\$0	\$645,000	\$875,000	\$0	\$0	\$7,595,568	NC	40
Orchards at Orenco, The	Hillsboro	Metro	REACH Community Development Inc	\$200,000	\$0	\$820,000	\$2,750,000	\$0	\$125,000	\$13,695,242	NC	57
Sandy Workforce Housing	Sandy	Metro	Northwest Housing Alternatives Inc	\$200,000	\$0	\$819,128	\$3,700,000	\$0	\$88,678	\$12,722,776	NC	56
			<b>TOTAL:</b>	<b>\$2,005,000</b>	<b>\$0</b>	<b>\$6,112,687</b>	<b>\$14,625,345</b>	<b>\$25,000</b>	<b>\$435,725</b>	<b>\$90,593,950</b>		<b>468</b>
			<b>AVAILABLE:</b>	<b>\$1,155,000</b>		<b>\$1,368,559</b>						
			<b>BALANCE:</b>	<b>\$0</b>		<b>\$0</b>						
<b>MULTNOMAH COUNTY</b>												
<b>Preservation</b>												
No applications received												
			<b>REQUESTED:</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>		<b>0</b>
			<b>ADVERTISED:</b>	<b>\$500,000</b>		<b>\$850,000</b>						
<b>NC &amp; Non-Pres A/R</b>												
<b>Proposed</b>												
Kehillah Housing	Portland	Metro	Robison Jewish Home Cedar Sinai Park	\$360,000	\$0	\$0	\$0	\$0	\$0	\$3,363,600	NC	15
Greenview Terrace Apts	Portland	Metro	Rose Community Development Corp	\$500,000	\$0	\$0	\$900,000	\$0	\$159,129	\$4,666,163	AR	31
Beech Street Apts	Portland	Metro	Home Forward	\$0	\$0	\$820,000	\$0	\$0	\$138,048	\$10,010,662	NC	32
			<b>PROPOSED:</b>	<b>\$860,000</b>	<b>\$0</b>	<b>\$820,000</b>	<b>\$900,000</b>	<b>\$0</b>	<b>\$297,177</b>	<b>\$18,040,425</b>		<b>78</b>
<b>Not Proposed:</b>												
Glisan Commons Phase II	Portland	Metro	REACH Community Development Inc	\$200,000	\$0	\$820,000	\$1,902,579	\$0	\$100,000	\$15,908,881	NC	60
Kafoury Court	Portland	Metro	Portland Community Reinvestment Init	\$200,000	\$0	\$600,000	\$914,786	\$0	\$35,000	\$7,910,308	NC	42
			<b>TOTAL:</b>	<b>\$1,260,000</b>	<b>\$0</b>	<b>\$2,240,000</b>	<b>\$3,717,365</b>	<b>\$0</b>	<b>\$432,177</b>	<b>\$41,859,614</b>		<b>180</b>
			<b>AVAILABLE:</b>	<b>\$860,000</b>		<b>\$820,000</b>						
			<b>BALANCE:</b>	<b>\$0</b>		<b>\$0</b>						

OHCS 2012 CFC REGIONAL AND SET ASIDE DISTRIBUTION  
FOR HOUSING COUNCIL

PROJECT NAME	CITY	REGION	SPONSOR	TRUST FUND	HOME	LIHTC	OAHTC	HELP	LWP	TOTAL COSTS	TYPE	TOTAL UNITS
<b>RURAL</b>												
<b>Preservation</b>												
<b>Proposed</b>												
Delfman Manor	Hood River	Metro	Providence Health and Services	\$500,000	\$750,000	\$0	\$415,716	\$0	\$0	\$1,843,216	R	27
Jetty Apts. The	Lincoln City	Valley	Guardian Affordable Housing Dev LLC	\$500,000	\$394,103	\$0	\$0	\$0	\$32,291	\$926,354	AR	34
Trail Apts	Boardman	East	Housing Authority of Umatilla County	\$200,000	\$503,703	\$466,700	\$0	\$0	\$0	\$5,021,922	AR	24
Williamette Pl. II, Meadow Glen	McMinnville	Valley	Shelter Resources Inc	\$0	\$0	\$820,000	\$0	\$0	\$0	\$10,560,763	AR	80
High Valley Estates	Klamath Falls	SW	Northwest Real Estate Capital Corp	\$200,000	\$0	\$326,107	\$775,000	\$0	\$46,626	\$4,243,211	AR	37
Brookside Rose Apts	Phoenix	SW	Chrisman Dev and Mgmt Inc	\$0	\$0	\$820,000	\$1,260,000	\$0	\$0	\$10,744,500	AR	76
<b>Not Proposed:</b>			<b>PROPOSED:</b>	<b>\$1,400,000</b>	<b>\$1,647,806</b>	<b>\$2,432,807</b>	<b>\$2,450,716</b>	<b>\$0</b>	<b>\$78,877</b>	<b>\$33,339,966</b>		<b>278</b>
Siuslaw Dunes	Florence	Valley	Northwest Housing Alternatives Inc	\$200,000	\$0	\$540,291	\$2,275,000	\$0	\$0	\$7,786,909	AR	45
Holiday Gardens	Sutherlin	SW	Holiday LLC	\$199,000	\$0	\$373,687	\$0	\$0	\$0	\$5,683,356	AR	58
			<b>TOTAL:</b>	<b>\$1,799,000</b>	<b>\$1,647,806</b>	<b>\$3,346,785</b>	<b>\$4,725,716</b>	<b>\$0</b>	<b>\$78,877</b>	<b>\$46,810,231</b>		<b>381</b>
			<b>AVAILABLE:</b>	<b>\$1,400,000</b>	<b>\$1,647,806</b>	<b>\$2,432,807</b>						
			<b>BALANCE:</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>						
<b>NC &amp; Non-Pros AR</b>												
<b>Proposed</b>												
Freedom Square & Liberty Pl	White City/Cen	SW	Housing Authority of Jackson Co	\$0	\$0	\$820,000	\$1,600,000	\$0	\$0	\$9,380,000	NC	50
Camas Ridge Apts	Roseburg	SW	United Community Action Network	\$500,000	\$999,431	\$0	\$0	\$120,000	\$22,500	\$1,986,931	NC	10
Firestone Place	Dallas	Valley	Polk Community Development Corp	\$500,000	\$560,860	\$0	\$0	\$0	\$0	\$1,279,915	NC	5
Deskings Commons	Newberg	Metro	Housing Authority of Yamhill Co	\$200,000	\$500,000	\$820,000	\$1,387,613	\$0	\$75,000	\$14,283,431	NC AR	56
Applegate Apts	Cottage Grove	Valley	Mainstream Housing Inc	\$500,000	\$525,000	\$0	\$125,000	\$0	\$0	\$1,355,000	AR	16
Hyde Park	Ashland	SW	ACCESS	\$441,173	\$500,000	\$0	\$0	\$0	\$0	\$1,184,735	NC	6
Eagle Landing	Seaside	NW	Clatsop County Housing Authority	\$500,000	\$0	\$0	\$0	\$0	\$0	\$633,337	AR	9
Freedom House One	Roseburg	SW	NeighborWorks Umpqua	\$0	\$900,000	\$0	\$0	\$0	\$0	\$12,145,000	NC	55
Freedom House Two	Grants Pass	SW	Options for Southern Oregon Inc	\$162,833	\$0	\$0	\$0	\$120,000	\$3,500	\$350,333	NC	1
	Grants Pass	SW	Options for Southern Oregon Inc	\$181,183	\$0	\$0	\$0	\$120,000	\$3,500	\$368,683	NC	1
<b>Not Proposed:</b>			<b>PROPOSED:</b>	<b>\$2,985,189</b>	<b>\$3,985,291</b>	<b>\$1,640,000</b>	<b>\$3,122,613</b>	<b>\$360,000</b>	<b>\$104,500</b>	<b>\$42,957,365</b>		<b>209</b>
Wood Park Terrace	Woodburn	Valley	Marion County Housing Authority	\$0	\$0	\$368,887	\$2,100,000	\$0	\$141,280	\$6,854,249	AR	52
Munsel Lake Village Apts	Florence	Valley	Munsel Lake Village Dev Assoc LLC	\$0	\$0	\$652,000	\$1,170,000	\$0	\$0	\$8,452,869	NC	35
Woodland Square	Albany	Valley	Innovative Housing Inc	\$200,000	\$0	\$820,000	\$930,000	\$0	\$89,156	\$10,601,365	NC	54
Generations One Apts	Medford	SW	Generations One Dev Assoc LLC	\$0	\$0	\$810,000	\$1,170,000	\$0	\$0	\$9,976,636	NC	34
Eastlake Village II	Bend	Central	Housing Works	\$0	\$0	\$615,015	\$1,600,000	\$0	\$55,409	\$7,411,489	NC	40
Ridge Apts. The	Lincoln City	Valley	Guardian Affordable Housing Dev LLC	\$200,000	\$0	\$793,809	\$0	\$0	\$277,142	\$11,554,210	AR	80
Camellia Court Apts	Newberg	Metro	Farmworker Housing Dev Corp	\$489,312	\$0	\$0	\$1,152,000	\$0	\$0	\$1,641,312	AR	24
Alona Place	Junction City	Valley	St Vincent de Paul Society of Lane Co	\$200,000	\$950,000	\$747,500	\$900,000	\$0	\$0	\$8,826,856	NC	40
20th Street	McMinnville	Valley	Oregon Memmonite Residential Services	\$271,795	\$0	\$0	\$0	\$0	\$0	\$273,901	AR	1
Sunset Senior Housing II	Athens	East	Sunset Housing Inc	\$500,000	\$155,475	\$0	\$0	\$0	\$0	\$714,141	NC	4
			<b>TOTAL:</b>	<b>\$4,846,296</b>	<b>\$5,090,766</b>	<b>\$6,447,211</b>	<b>\$12,144,613</b>	<b>\$360,000</b>	<b>\$667,487</b>	<b>\$109,264,413</b>		<b>573</b>
			<b>AVAILABLE:</b>	<b>\$2,985,189</b>	<b>\$3,985,291</b>	<b>\$1,640,000</b>						
			<b>BALANCE:</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>						
			<b>STATEWIDE TOTAL:</b>	<b>\$10,910,296</b>	<b>\$6,738,572</b>	<b>\$21,361,809</b>	<b>\$45,465,727</b>	<b>\$385,000</b>	<b>\$2,215,325</b>	<b>\$331,618,393</b>		<b>1,830</b>
			<b>STATEWIDE AVAILABLE:</b>	<b>\$6,800,189</b>	<b>\$5,633,097</b>	<b>\$7,472,642</b>	<b>\$15,153,825</b>	<b>\$385,000</b>	<b>\$947,118</b>			
			<b>STATEWIDE PROPOSED:</b>	<b>\$6,800,189</b>	<b>\$5,633,097</b>	<b>\$7,472,642</b>	<b>\$15,153,825</b>	<b>\$385,000</b>	<b>\$947,118</b>	<b>\$138,042,978</b>		<b>802</b>
			<b>STATEWIDE BALANCE:</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>			

**OHCS 2012 CFO STATEWIDE  
FOR HOUSING COUNCIL**

PROJECT NAME	CITY	SPONSOR	TRUST FUND	HOME	LIHTC	OAHTC	HELP	LIWP	TOTAL COSTS	COST PER UNIT
Proposed:										
Alma Gardens	Hillsboro	Northwest Housing Alternatives Inc	\$0	\$0	\$750,000	\$1,200,000	\$0	\$99,858	\$8,899,168	\$197,759
Applegate Apts	Cottage Grove	Mainstream Housing Inc	\$500,000	\$525,000	\$0	\$125,000	\$0	\$0	\$1,355,000	\$84,688
Beech Street Apartments	Portland	Home Forward	\$0	\$0	\$820,000	\$0	\$0	\$138,048	\$10,010,662	\$312,833
Brookside Rose Apartments	Phoenix	Chrisman Development and Mgmt Inc	\$0	\$0	\$820,000	\$1,260,000	\$0	\$0	\$10,744,500	\$141,375
Camas Ridge Apartments	Roseburg	United Community Action Network	\$500,000	\$999,431	\$0	\$0	\$120,000	\$22,500	\$1,966,931	\$196,693
CSLGH Cornell Rd	Hillsboro	Community Services Inc	\$255,000	\$0	\$0	\$0	\$25,000	\$62,189	\$598,350	\$598,350
Deskens Commons	Newberg	Housing Authority of Yamhill County	\$200,000	\$500,000	\$820,000	\$1,397,613	\$0	\$75,000	\$14,283,431	\$255,061
Dethman Manor	Hood River	Providence Health and Services	\$500,000	\$750,000	\$0	\$415,716	\$0	\$0	\$1,843,216	\$68,267
Eagle Landing	Roseburg	NeighborWorks Umpqua	\$0	\$900,000	\$0	\$0	\$0	\$0	\$12,145,000	\$220,818
Farrington Meadows	Alaha	Guardian Affordable Housing Dev LLC	\$200,000	\$0	\$820,000	\$4,650,000	\$0	\$235,287	\$13,775,585	\$199,646
Firestone Place	Dallas	Polk Community Development Corp	\$500,000	\$560,860	\$0	\$0	\$0	\$0	\$1,279,915	\$255,983
Freedom House One	Grants Pass	Options for Southern Oregon Inc	\$162,833	\$0	\$0	\$0	\$120,000	\$3,500	\$350,333	\$350,333
Freedom House Two	Grants Pass	Options for Southern Oregon Inc	\$181,183	\$0	\$0	\$0	\$120,000	\$3,500	\$368,683	\$368,683
Freedom Square & Liberty Pt	White City/Central	Housing Authority of Jackson County	\$0	\$0	\$820,000	\$1,600,000	\$0	\$0	\$9,390,000	\$187,800
Greenview Terrace Apts	Portland	Rose Community Development Corp	\$500,000	\$0	\$0	\$900,000	\$0	\$159,129	\$4,666,163	\$150,521
Harkson Court	Forest Grove	Accessible Living Inc	\$400,000	\$0	\$0	\$0	\$0	\$0	\$839,274	\$41,964
High Valley Estates	Klamath Falls	Northwest Real Estate Capital Corp	\$200,000	\$0	\$326,107	\$775,000	\$0	\$46,626	\$4,243,211	\$114,681
Hollyfield Village Apts	Lake Oswego	Northwest Housing Alternatives Inc	\$200,000	\$0	\$391,276	\$1,580,151	\$0	\$69,230	\$5,711,074	\$190,969
Hyak	Seaside	Clatsop County Housing Authority	\$500,000	\$0	\$0	\$0	\$0	\$0	\$633,337	\$70,371
Hyde Park	Ashland	ACCESS	\$441,173	\$500,000	\$0	\$0	\$0	\$0	\$1,184,735	\$197,456
Jetty Apts, The	Lincoln City	Guardian Affordable Housing Dev LLC	\$500,000	\$394,103	\$0	\$0	\$0	\$32,251	\$926,354	\$27,246
Juniper Gardens Apts Ph 2	Forest Grove	Blensstar	\$500,000	\$0	\$0	\$0	\$0	\$0	\$5,585,286	\$253,877
Kehillah Housing	Portland	Robison Jewish Home Cedar Sinai Park	\$360,000	\$0	\$0	\$0	\$0	\$0	\$3,363,600	\$224,240
Lancaster Bridge Apts	Corvallis	Willamette Neighborhood Housing Svcs	\$0	\$0	\$618,559	\$1,250,345	\$0	\$0	\$8,296,485	\$165,930
Trail Apartments	Boardman	Housing Authority of Umatilla County	\$200,000	\$503,703	\$466,700	\$0	\$0	\$0	\$5,021,922	\$209,247
Willamette Pt I, II, Meadow Glen	McMinnville	Shelter Resources Inc	\$0	\$0	\$820,000	\$0	\$0	\$0	\$10,560,763	\$132,010
		<b>Statewide Proposed:</b>	<b>\$6,800,189</b>	<b>\$5,633,097</b>	<b>\$7,472,642</b>	<b>\$15,153,825</b>	<b>\$385,000</b>	<b>\$947,118</b>	<b>\$138,042,978</b>	
<b>Not Proposed:</b>										
20th Street	McMinnville	Oregon Mennonite Residential Services	\$271,795	\$0	\$0	\$0	\$0	\$0	\$273,901	\$273,901
Alona Place	Junction City	St Vincent de Paul Society of Lane Co	\$200,000	\$950,000	\$747,500	\$900,000	\$0	\$0	\$8,826,856	\$220,671
Barcelona at Beaverton, The	Beaverton	Community Partners for Affordable Hsg	\$50,000	\$0	\$820,000	\$1,200,000	\$0	\$50,000	\$10,274,408	\$223,357
Bascom Village Phase I	Eugene	St Vincent de Paul Society of Lane Co	\$200,000	\$0	\$820,000	\$900,000	\$0	\$0	\$9,610,492	\$181,330
Camellia Court Apts	Newberg	Farmworker Housing Development Corp	\$489,312	\$0	\$0	\$1,152,000	\$0	\$0	\$1,641,312	\$68,388
Eastlake Village II	Bend	Housing Works	\$0	\$0	\$615,015	\$1,600,000	\$0	\$55,409	\$7,411,489	\$185,287
Generations One Apartments	Medford	Generations One Dev Assoc LLC	\$0	\$0	\$810,000	\$1,170,000	\$0	\$0	\$9,976,636	\$293,430
Glisan Commons Phase II	Portland	REACH Community Development Inc	\$200,000	\$0	\$820,000	\$1,902,579	\$0	\$100,000	\$15,908,881	\$265,148
Holiday Gardens	Sutherlin	Holiday LLC	\$199,000	\$0	\$373,687	\$0	\$0	\$0	\$5,683,356	\$77,989
Katoury Court	Portland	Portland Community Reinvestment Init	\$200,000	\$0	\$600,000	\$914,786	\$0	\$35,000	\$7,910,308	\$188,341
Munsel Lake Village Apts	Florence	Munsel Lake Village Dev Assoc LLC	\$0	\$0	\$652,000	\$1,170,000	\$0	\$0	\$8,452,869	\$241,511
Orchards at Orengo, The	Hillsboro	REACH Community Development Inc	\$200,000	\$0	\$820,000	\$2,750,000	\$0	\$125,000	\$13,695,242	\$240,267
Parkway West	Salem	Housing Authority of the City of Salem	\$200,000	\$0	\$820,000	\$2,750,000	\$0	\$0	\$12,476,911	\$159,960
Ridge Apts, The	Lincoln City	Guardian Affordable Housing Dev LLC	\$200,000	\$0	\$793,809	\$0	\$0	\$277,142	\$11,554,210	\$144,428
Riverview Terrace Apartments	Salem	Salem-Keizer CDC	\$0	\$0	\$645,000	\$875,000	\$0	\$0	\$7,595,558	\$189,889
Sandy Workforce Housing	Sandy	Northwest Housing Alternatives Inc	\$200,000	\$0	\$819,128	\$3,700,000	\$0	\$98,678	\$12,722,776	\$227,192
Siuslaw Dunes	Florence	Northwest Housing Alternatives Inc	\$500,000	\$155,475	\$540,291	\$2,275,000	\$0	\$0	\$7,786,909	\$173,042
Sunset Senior Housing II	Athens	Sunset Housing Inc	\$200,000	\$0	\$820,000	\$1,010,000	\$0	\$0	\$174,141	\$176,535
Viking Village I	Salem	Guardian Affordable Housing Dev LLC	\$200,000	\$0	\$820,000	\$1,010,000	\$0	\$180,276	\$9,055,677	\$164,649

**OHCS 2012 CFG STATEWIDE  
FOR HOUSING COUNCIL**

PROJECT NAME	CITY	SPONSOR	TRUST FUND	HOME	LIHTC	OAHTC	HELP	LIWP	TOTAL COSTS	COST PER UNIT
Viking Village II	Salem	Guardian Affordable Housing Dev LLC	\$200,000	\$0	\$511,366	\$600,000	\$0	\$116,266	\$5,637,312	\$176,166
Village East Apt (Springfield)	Springfield	Guardian Affordable Housing Dev LLC	\$200,000	\$0	\$672,484	\$2,412,537	\$0	\$0	\$8,910,537	\$212,156
Wood Park Terrace	Woodburn	Marion County Housing Authority	\$0	\$0	\$368,887	\$2,100,000	\$0	\$141,280	\$6,854,249	\$131,812
Woodland Square	Albany	Innovative Housing Inc	\$200,000	\$0	\$820,000	\$930,000	\$0	\$89,156	\$10,601,385	\$196,322
		Not Proposed:	\$4,110,107	\$1,105,475	\$13,889,167	\$30,311,902	\$0	\$1,268,207	193,575,415	
		Statewide Requested:	10,910,296	6,738,572	21,361,809	45,465,727	385,000	2,215,325	331,618,393	

**OHCS 2012 CFC STATEWIDE  
FOR HOUSING COUNCIL**

PROJECT NAME	CONST R/ SQFT	TYPE	POPULATION (SVCS)	TOTAL UNITS	PRES	#PBA	TYPE OF PBA	#80%	#70%	#60%	#50%	#40%	#30%	N/A	#SRO	#STU	#1 BR	#2 BR	#3 BR	#4 BR	MGRS	#BEDS	#ACC	#VISIT	#NET
<b>Proposed:</b>																									
Alma Gardens	\$133.99	NC	ELD	45				0	0	0	44	0	0	1	0	0	44	0	0	0	1	0	3	45	45
Applegate Apts	\$36.41	AR	DIS (DD)	16				0	0	0	12	3	3	1	0	0	16	0	0	0	0	0	0	0	0
Beech Street Apartments	\$178.23	NC	ADR	32				0	0	31	0	0	0	0	0	0	0	25	6	0	1	0	3	32	32
Brookside Rose Apartments	\$74.82	AR	ELD DIS (PHY)	76				0	0	0	76	0	0	0	0	0	76	0	0	0	0	0	4	58	0
Camas Ridge Apartments	\$138.45	NC	ADR	10				0	0	0	10	0	0	0	0	0	4	4	2	0	0	0	1	5	10
CSI GH Cornell Rd	\$98.17	NCA R	DIS (DD)	1				0	0	0	0	0	1	0	0	0	0	0	0	0	0	5	1	1	1
Deskings Commons	\$180.22	NCA R	DIS (CMI) FAM	56				0	0	0	56	0	0	0	0	0	11	36	8	0	1	0	3	50	56
Deftman Manor	\$48.39	R	ELD	27				0	0	27	0	0	0	0	0	0	27	0	0	0	0	0	3	27	0
Eagle Landing	\$192.04	NC	HOM	55				0	0	48	6	0	0	1	0	0	44	8	3	0	1	0	10	28	0
Farmington Meadows	\$92.42	AR	FAM	69				0	0	68	0	0	0	1	0	0	8	44	17	0	0	0	4	0	0
Firestone Place	\$184.35	NC	ADR	5				0	0	0	5	0	0	0	0	0	5	0	0	0	0	0	1	0	5
Freedom House One	\$90.30	NC	DV HOM	1				0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1	1	1
Freedom House Two	\$0.00	NC	DV HOM	1				0	0	0	1	0	0	0	0	0	0	0	0	0	0	5	3	5	1
Freedom Square & Liberty Pl	\$143.98	NC	VETS FAM	50				0	0	18	31	0	0	1	0	0	24	21	4	0	0	0	3	29	50
Greenview Terrace Apts	\$98.03	AR	VETS FAM HOM (PHY)	31				0	0	0	24	0	7	0	0	0	20	10	0	0	1	0	2	29	0
Harkson Court	\$13.58	R	ELD	20				0	0	0	19	0	0	1	0	0	2	14	3	0	1	0	20	20	0
High Valley Estates	\$44.66	AR	FAM DIS (PHY)	37				0	0	12	24	0	0	1	0	0	0	12	24	0	1	0	3	0	0
Hollyfield Village Apts	\$59.74	AR	ELD	30				0	0	30	0	0	0	0	0	0	27	2	0	0	1	0	2	0	30
Hyak	\$42.04	AR	HOM	9				0	0	0	4	0	5	0	0	5	4	0	0	0	0	0	1	1	9
Hyde Park	\$143.73	NC	FAM	6				0	0	0	6	0	0	0	0	0	3	1	2	0	0	0	2	4	0
Jetty Apts, The	\$11.54	AR	ELD	34				0	0	33	0	0	0	1	0	0	29	4	0	0	1	0	2	2	34
Juniper Gardens Apts Ph 2	\$152.95	NC	FW	22				0	0	8	13	0	0	0	0	0	0	8	12	2	0	0	2	16	22
Kehillah Housing	\$188.69	NC	DIS (DD) HOM	15				0	0	0	1	0	14	0	0	0	15	0	0	0	0	0	2	15	0
Lancaster Bridge Apts	\$84.70	AR	DIS (DD) DV FAM HOM	50				0	0	0	49	0	0	1	0	0	0	15	31	4	0	0	3	0	0
Trail Apartments	\$132.12	AR	FAM	24				0	0	0	24	0	0	0	0	0	0	24	0	0	0	0	1	24	0
Williamette Pt I, II, Meadow Glen	\$72.16	AR	FAM DIS (PHY) ELD	80				0	0	31	18	29	0	2	0	0	48	21	9	0	2	0	6	0	0
				802				0	0	382	338	42	30	11	0	5	402	254	121	6	11	15	86	392	296
<b>Not Proposed:</b>																									
20th Street	\$56.41	AR	DIS (DD)	1				0	0	0	1	0	0	0	0	0	0	0	0	1	0	0	1	1	0
Alona Place	\$143.35	NC	FAM	40				0	0	0	36	3	0	1	0	0	8	21	11	0	1	0	2	40	0
Barcelona at Beaverton, The	\$162.65	NC	ELD	46				0	0	17	22	0	8	0	0	3	41	2	0	0	0	0	3	47	47
Bascom Village Phase I	\$117.75	NC	DIS (CMI) FAM	53				0	0	0	52	0	0	1	0	0	13	23	15	1	1	0	3	32	0
Camellia Court Apts	\$33.50	AR	FAM	24				0	0	0	24	0	0	0	0	0	0	17	7	0	0	0	0	0	0
Eastlake Village II	\$135.39	NC	FAM	40				0	0	0	40	0	0	0	0	0	8	16	16	0	0	0	20	20	0
Generations One Apartments	\$181.33	NC	FAM HOM	34				0	8	0	26	0	4	0	0	0	10	18	6	0	0	0	4	34	34
Gleason Commons Phase II	\$189.48	NC	ELD	60				0	0	0	56	0	0	0	0	0	60	0	0	0	0	0	3	60	0
Holiday Gardens	\$42.54	AR	DIS (PHY) ELD	58				0	0	58	0	0	0	0	0	0	44	14	0	0	0	0	6	37	0
Katoufy Court	\$166.42	NC	ELDF	42				0	0	17	2	12	11	0	0	11	26	4	0	0	1	0	4	38	0
Munsel Lake Village Apts	\$134.73	NC	FAM	35				0	0	0	35	0	0	0	0	0	8	20	7	0	0	0	28	28	35
Orchards at Orenco, The	\$213.28	NC	FAM	57				0	0	8	49	0	0	0	0	0	41	16	0	0	0	0	3	57	57
Parkway West	\$77.77	AR	FAM	78				0	0	9	69	0	0	0	0	0	0	48	30	0	0	0	4	30	0
Ridge Apts, The	\$70.76	AR	DV FAM	80				0	0	38	42	0	0	0	0	0	0	38	40	0	2	0	4	20	80
Riverview Terrace Apartments	\$131.31	NC	FAM	40				0	0	0	39	0	0	1	0	0	4	35	0	0	1	0	16	16	40
Sandy Workforce Housing	\$150.89	NC	FAM DIS (PHY)	56				0	0	18	38	0	0	0	0	0	8	30	11	6	1	0	4	56	56
Siuslaw Dunes	\$75.81	AR	FAM	45				0	0	44	0	0	0	1	0	0	6	31	8	0	0	0	2	0	0
Sunset Senior Housing II	\$198.48	NC	ELD	4				0	0	0	4	0	0	0	0	0	4	0	0	0	0	0	4	4	0
Viking Village I	\$131.48	AR	FAM	55				0	0	19	35	0	0	1	0	9	26	19	0	0	1	0	3	0	0

**OHSS 2012 CFO STATEWIDE  
FOR HOUSING COUNCIL**

PROJECT NAME	CONST R/ SQFT	TYPE	POPULATION (SVCS)	TOTAL UNITS	PRES	#PBA	TYPE OF PBA	% 80%	% 70%	% 60%	% 50%	% 40%	% 30%	N/A	# SRO	# STU	# 1 BR	# 2 BR	# 3 BR	# 4 BR	MGRS	# BEDS	# ACC	# VISIT	# NET
Viking Village II	\$131.82	A R	FAM	32	x	32	HUD	0	0	8	24	0	0	0	0	0	24	4	4	4	0	0	2	0	0
Village East Apt (Springfield)	\$101.33	NC A R	FAM	42	x	42	HUD	0	0	42	0	0	0	0	0	0	2	35	4	4	0	0	4	4	0
Wood Park Terrace	\$64.19	A R	FAM	52				0	4	4	44	0	0	0	0	0	0	28	23	0	0	0	3	26	52
Woodland Square	\$155.42	NC	FAM	54				0	0	28	23	0	31	0	0	0	9	35	6	3	0	0	3	17	54
				1,028		230		0	12	310	660	16	26	5	0	23	342	454	189	10	8	3	126	567	455
				1,830		532		0	12	692	998	58	56	16	0	28	744	708	310	16	19	18	212	959	751

**CONSOLIDATED FUNDING CYCLE – 2012  
PROPOSED RESERVATIONS**

**Total Applications Received: 50**

**Selected For Funding: 26**

**Program Totals:**

<i>Program</i>	<i>Requested</i>	<i>Advertised</i>	<i>Proposed</i>
TRUST FUND	\$10,910,296	\$5,000,000	\$6,800,189
HOME	\$6,738,572	\$3,700,000	\$5,633,097
LIHTC	\$21,361,809	\$8,000,000	\$7,472,642
OAHTC	\$45,465,727	\$10,000,000	\$15,153,825
HELP	\$385,000	\$240,000	\$385,000
LIWP	\$2,215,325	\$700,000	\$947,118

**Summary Of Proposed:**

Average Leverage:	HDGP (Trust Fund):	\$9.00
	All Grant Programs:	\$6.20
Average Years of Commitment:		60
Total Project Costs:		\$138,042,978
Sponsor Type:	CHDO:	4 Funded Out Of 4
	Local Government:	0 Funded Out Of 0
	Housing Authority:	5 Funded Out Of 8
	Non-Profit:	12 Funded Out Of 24
	For-Profit:	5 Funded Out Of 14
Type of Project:	New Construction:	25
	Acquisition / Rehab:	20
	Rehabilitation only:	2
	Both New Construction & Acq/Rehab:	3

	<i># of Units 61- 80%</i>	<i># of Units 51-60%</i>	<i># of Units 41-50%</i>	<i># of Units 31-40%</i>	<i># of Units Below 30%</i>	<i># Mgr Unit</i>	<i>Total</i>
<i># of Units</i>	0	382	338	42	30	11	802
<i>Performance Goal</i>	--	35%	35%	13%	10%	--	
<i>% of Goal Met</i>	0%	48%	42%	5%	4%	1%	100%

\*302 of the 802 units funded have HUD or RD project-based assistance attached which ensures that the tenant pays just 30% of their income for household expense. Anticipate that the majority of tenants will have incomes at or below 50% MFI, many with incomes at or below 30% MFI.

**Proposed Reservations By Performance Measures Goal – Special Needs:**

	Homeless	Elderly	Farmworker	Disabled, with services for:			Veterans	Victims of Domestic Violence	Total Special Needs	Total Units All Proposed
				CMI	DD	Physically				
# of Units	101	234	22	56	40	125	60	17	702	802
% per Pop.	13%	29%	3%	7%	5%	16%	7%	2%	100%	
									Perf. Goal	50%
									% of Goal Met	88%

**Funding Reservations Distributed By Regional and Set-Aside:**

REGION	HDGP	HOME	LIHTC	OAHTC	HELP	LIWP
Urban / Metro (Preservation Set-Aside)	\$400,000	\$0	\$1,211,276	\$6,230,151	\$0	\$304,517
Urban / Metro (NC & Non-Pres A/R)	\$1,155,000	\$0	\$1,368,559	\$2,450,345	\$25,000	\$162,047
Multnomah County (Preservation Set-Aside)	No applications received					
Multnomah County (NC & Non-Pres A/R)	\$860,000	\$0	\$820,000	\$900,000	\$0	\$297,177
Rural (Preservation Set-Aside)	\$1,400,000	\$1,647,806	\$2,432,807	\$2,450,716	\$0	\$78,877
Rural (NC & Non-Pres A/R)	\$2,985,189	\$3,985,291	\$1,640,000	\$3,122,613	\$360,000	\$104,500



# Oregon

John A. Kitzhaber MD, Governor

## Oregon Housing and Community Services

725 Summer St NE, Suite B

Salem, Oregon 97301-1266

(503) 986-2000 | FAX (503) 986-2020

TTY: (503) 986-2100

[www.ohcs.oregon.gov](http://www.ohcs.oregon.gov)

DATE: July 3, 2012  
TO: Oregon Housing Council  
FROM: Margaret S. Van Vliet, Director

The following projects received 2012 CFC funding reservations that do not require Housing Council approval:

*Alma Gardens (Hillsboro, OR)*

*Beech Street Apartments (Portland, OR)*

*Brookside Village Apartments/Rose Court Apartments(Phoenix, OR)*

*Freedom Square & Liberty Place (White City /Central Point, OR)*

*Freedom House One (Grants Pass, OR)*

*Freedom House Two (Grants Pass, OR)*

*High Valley Estates (Klamath Falls, OR)*

*Hollyfield Village Apartments (Lake Oswego, OR)*

*Lancaster Bridge Apartments (Corvallis, OR)*

*Willamette Place I & II & Meadow Glen Apartments (Tillamook & McMinnville, OR)*

For informational purposes, reports are included for those projects and will be covered in the 2012 CFC overview.



## 2012 CFC HOUSING COUNCIL OVERVIEW

Project Name:	<b>Alma Gardens</b>	No. of Units:	45
Project Address:	6200 NE Campus Court	County:	Washington
Project City/St/Zip:	Hillsboro, OR 97124	US House Dist.:	001
Sponsor Name:	Northwest Housing Alternatives	State Senate Dist.:	015
Consultant:	n/a	State House Dist.:	030
Architect:	Michael Willis Architects	Years of Affordability(60 yr. Min):	60
Contractor:	Walsh Construction	Target Population:	Senior
Property Mgmt.:	TBD		

**Project Description (brief narrative):**

Alma Gardens is a 45-unit senior housing project occupying a .72 acre site at the Orenco Station MAX stop. This location offers tremendous access to a set of services that are incredibly beneficial for the low-income senior population. First and foremost, Alma Gardens was designed and built as a walkable community that will foster not only an active resident population, but will allow residents to live comfortably without the expense of a car. The Environmental Review Checklist details some of the exact distances, but generally a ¼ mile walk to the retail node of the community offers access to a grocery store, coffee shop, a large park and various restaurants and small shops. The site is also directly adjacent to the MAX Station Park and Ride, making easy access to downtown and other areas of the Portland-metro area via TriMet just a few minutes' walk.

NHA's excitement about Alma Gardens is driven by the opportunity to bring our expertise in building senior housing to a great transit oriented development community. The neighborhood is predominantly single-family homes and market rate rental; it is entirely devoid of affordable housing. Alma Gardens will change this dynamic. It will bring 45 units of deeply affordable senior housing to the neighborhood and to Washington County, where such housing is a Priority 1 per the CFC Needs Analysis.

Project Name:	<b>Beech Street Apartments</b>	No. of Units:	32
Project Address:	NE Beech Street, between NE Mallory and Garfield Avenues	County:	Multnomah
Project City/St/Zip:	Portland, OR 97212	US House Dist.:	003
Sponsor Name:	Home Forward	State Senate Dist.:	022
Consultant:	NA	State House Dist.:	043
Architect:	Holst Architecture	Years of Affordability(60 yr. Min):	60
Contractor:	Walsh Construction Company	Target Population:	Family, A & D
Property Mgmt.:	Home Forward		

**Project Description (brief narrative):**

Beech Street Apartments will be 32 units of alcohol and drug-free housing. It will have 25 two-bedroom units, 6 three-bedroom units, and a one-bedroom manager's unit all in a secured building. A separate part of the development will be new for Project Network, an established residential drug and alcohol abuse treatment program for women with children. This will provide a custom-designed, stable home for the program, which is facing a non-negotiable lease termination at its current location. By developing Beech Street Apartments along with the new Project Network program, Home Forward will make available permanent housing that will support the struggle toward recovery for graduates of Project Network and other drug and alcohol treatment programs.

1	Project Name:	<b>Brookside Village Apts. (Bldg. 1)</b>	No. of Units:	40
2	Project Address:	933 N. Rose Street	County:	Jackson
3	Project City/St/Zip:	Phoenix, OR 97535	US House Dist.:	002
4	Sponsor Name:	Chrisman Development & Mgt., Inc.	State Senate Dist.:	003
	Consultant:	Silver Consulting Services	State House Dist.:	005
5	Architect:	Pinnacle Architecture	Years of Affordability(60 yr. Min):	60
6	Contractor:	W.C. Construction	Target Population:	Elderly/Disabled
	Property Mgmt.:	Viridian Management		

7

8	Project Name:	<b>Rose Court Apts. (Bldg. 2)</b>	No. of Units:	36
9	Project Address:	1108 NE Rose Street	County:	Jackson
10	Project City/St/Zip:	Phoenix, OR 97535	US House Dist.:	002
11	Sponsor Name:	Chrisman Development & Mgt., Inc.	State Senate Dist.:	003
	Consultant:	Silver Consulting Services	State House Dist.:	005
12	Architect:	Pinnacle Architecture	Years of Affordability(60 yr. Min):	60
	Contractor:	W.C. Construction	Target Population:	Elderly/Disabled
13	Property Mgmt.:	Viridian Management		

14 **Building One - Project Description :**

15 The subject property is an existing subsidized apartment complex built in 1988 located in an established residential neighborhood in Phoenix, Oregon, about 5 miles south of Medford. Brookside Village is a development for the elderly and disabled. Brookside Village is comprised of a one-story community building, a one-story laundry building, 3 one-story residential buildings and 5 two-story residential buildings. There are 40 one-bedroom units, two of which are designated as handicapped accessible.

17 Major elements of the proposed rehabilitation include site repairs and improvements to enhance appearance, drainage and accessibility; new siding, windows, exterior doors and new steel stairways and railings; new kitchen appliances and hot water heaters, new cabinets and some new flooring.

19 **Building Two Project Description:**

20 The subject property is an existing subsidized apartment complexes built in 1987 located in an established residential neighborhood in Phoenix, Oregon, about 5 miles south of Medford. Rose Court is a development for the elderly and disabled. Rose Court is comprised of a single one-story community building, 3 one-story residential buildings and 4 two-story residential buildings. There are 36 one-bedroom units, two of which are designated as handicapped accessible.

22 Major elements of the proposed rehabilitation include site repairs and improvements to enhance appearance, drainage and accessibility; new siding, windows, exterior doors and new steel stairways and railings; new kitchen appliances and hot water heaters, new cabinets and some new flooring.

23

1	Project Name:	<b>Freedom Square &amp; Liberty Place</b>	No. of Units:	50
2	Project Address:	<b>Freedom Square – Corner of Wilson Way and Avenue “E” White City &amp; Liberty Place - 405 N. Second St. Central Point</b>	County:	Jackson
3				
4	Project City/St/Zip:	White City, OR 97503 & Central Point, OR 97502	US House Dist.:	02
5	Sponsor Name:	Housing Authority of Jackson County	State Senate Dist.:	02
6	Consultant:		State House Dist.:	06
7	Architect:	Dan Horton	Years of Affordability(60 yr. Min):	60
8	Contractor:	Adroit Construction	Target Population:	Workforce Families / Homeless Veterans
9	Property Mgmt.:	Housing Authority of Jackson County		

**Project Description (brief narrative):**

Freedom Square and Liberty Place are proposed new construction in a scattered site project with a total of 50 units of affordable housing - 34 units at Freedom Square in White City and 16 units at Liberty Place in Central Point. This project will create new affordable housing options where they are needed most for the highest priority populations in Jackson County: homeless veterans and 50% AMI workforce households.

**Freedom Square, White City**

For years, the Housing Authority of Jackson County (HAJC) and the Veterans Affairs Southern Oregon Rehabilitation Center and Clinics (VA SORCC, or VA) envisioned a partnership project that would bring affordable housing options for homeless veterans close to the VA SORCC facility in White City where they receive services. Freedom Square will realize that vision with 18 units of mostly one-bedroom apartments dedicated to homeless veterans using Section 8 project-based HUD Veterans Affairs Supportive Housing vouchers (VASH).

Veterans who will reside at Freedom Square are currently either homeless receiving outpatient services from the VA or are living at the VA's transitional living domicile. The VA will coordinate care and deliver case management services from an on-site office located in the community building.

The remaining 16 units will have below market rents targeted to 50% AMI workforce households. HAJC has waiting lists at all of its recent tax credit communities. HAJC does not own or manage any apartments in the White City area. They receive numerous requests each year from applicants seeking decent, affordable housing that would locate them near the many manufacturing and mill jobs in White City.

Twenty-six garden-style apartment flats are divided among four two-story buildings along Wilson Way. All first floor units are ADA adaptable and visitable; two units will be fully accessible. Eight two-bedroom townhomes in two buildings border the West side in addition to a community building, playground, and community garden. Parking for residents is centrally located and screened from the street.

The White City Community Center & Library, public transportation and a beautiful new County Park are less than a ½ mile away. Elementary schools, White Mountain Middle School and Southern Oregon Head Start are less than a ¼ mile from the site. Retail and grocery shopping facilities are within 2 miles. The veterans residing at Freedom Square will benefit from being only one mile away from the VA SORCC where they will receive regular clinical care and support.

**Liberty Place, Central Point**

Liberty Place will serve 50% AMI workforce households. Sixteen garden-style apartment flats will be divided among two 2-story buildings. All first floor units will be ADA adaptable and visitable; one unit will be fully accessible.

Liberty Place will be built on a .66 acre of property owned by HAJC and located in the heart of Central Point's Transit Oriented District. To the north is a subdivision of six two-story single family homes built in 2004. The South, East, and West sides of the property are a mix of small one and two-story homes built before 1961 and one and two-story duplexes and four-plex units built in the late 70's.

The site is within walking distance to downtown city services, grocery, retail, and employment centers making it an ideal location for a workforce housing population. Schools for all age levels from preschool to high school are located within 2/3 of a mile. Two public transit bus stops are within three blocks with service to Medford, the region's economic hub.

Freedom Square and Liberty Place are the sister projects in design to Scenic Heights, a 48-unit LIHTC project located only 1/2 mile away in Central Point, Snowberry Brook, a sixty unit LIHTC project located in Ashland, Oregon and Canterbury Hills, a 48-unit LIHTC project located in Medford, Oregon. Scenic Heights, Snowberry Brook and Canterbury Hills all being completed in the last three years have been very well received in the community with their well-designed buildings and curb appeal. Freedom Square and Liberty Place will benefit from the same design, same build team and lessons learned during the construction of prior projects.

8

9 Project Name:	<b>Freedom House One</b>	No. of Units:	1 (5-bdr.group home)
Project Address:	SE Clarey Ave. (# to be assigned)	County:	Josephine
10 Project City/St/Zip:	Grants Pass, Or. 97526	US House Dist.:	2
11 Sponsor Name:	Options for Southern Oregon	State Senate Dist.:	2
12 Consultant:	Richard Ward & Associates	State House Dist.:	3
Architect:	Richard Ward & Associates	Years of Affordability(60 yr. Min):	60
13 Contractor:	Richard Ward & Associates	Target Population:	Homeless women in recovery
14 Property Mgmt.:	Options for Southern Oregon		

15 **Project Description (brief narrative):**

16 The existing Freedom House is a 1951 home and is an alcohol and drug free transitional house in a residential neighborhood in Grants Pass and the only alcohol and drug free transitional housing program in Josephine County that caters exclusively to women who are struggling with addition issues. The program provides transitional drug and alcohol free housing for individuals who are developing the life skills they need to acquire permanent housing. Some of the women may have children. All residents must be active in a recovery program. Many of the women are coming from prison and may be working with DHS Child Protective Services. They will receive services including housing coordination, job search assistance, treatment support and advocacy. Due to the ongoing physical structural issues in the 1951 home, Options for Southern Oregon (Options) is proposing to develop a new house on a separate parcel of the property and will be a five-room residential setting for homeless women in recovery to be called Freedom House One. After residents have moved into the newly constructed Freedom House One, the demolition of the 1951 house will occur.

21

22

23

1	Project Name:	<b>Freedom House Two</b>	No. of Units:	1 (5 bdr.group home)
2	Project Address:	1055 SE Clarey Ave.	County:	Josephine
3	Project City/St/Zip:	Grants Pass, Or. 97526	US House Dist.:	2
4	Sponsor Name:	Options for Southern Oregon	State Senate Dist.:	2
5	Consultant:	Rich Ward Associates	State House Dist.:	3
6	Designer:	Rich Ward Associates	Years of Affordability(60 yr. Min):	
7	Contractor:	Rich Ward Associates	Target Population:	Homeless women in recovery
8	Property Mgmt.:	Options for Southern Oregon		

8 Project Description (brief narrative):

9 The existing Freedom House (built in 1951) is an existing alcohol and drug free transitional house in a residential neighborhood in Grants Pass and is the only alcohol and drug free transitional housing program in Josephine County that caters exclusively to women who are struggling with addition issues. The program provides transitional drug and alcohol free housing for individuals who are developing the life skills they need to acquire permanent housing. Many of the women are coming from prison and may be working with DHS Child Protective Services. They will receive services including housing coordination, job search assistance, treatment support and advocacy. The existing house was built in 1951 and has significant repair and maintenance issues. Options has invested a significant amount of resources towards repairs in the home and has found that the cost to fully renovate the existing home to be prohibitive. Options vision for redevelopment of the two parcel site is to build a new home on the vacant parcel (Freedom House One), move the residents from the existing 1951 home into the newly constructed home, demolish the 1951 home and build a second 5 bedroom home (Freedom House Two) The addition of 5 more bedrooms on the two parcel site will give Options the opportunity to provide additional affordable transitional housing in the community. The redevelopment of Freedom House Two will compliment and augment the program in Freedom House One.

16	Project Name:	<b>High Valley Estates</b>	No. of Units:	37
17	Project Address:	1333 Avalon St.	County:	Klamath
18	Project City/St/Zip:	Klamath Falls, OR 97603	US House Dist.:	2 <sup>nd</sup>
19	Sponsor Name:	Northwest Real Estate Capital Corp.	State Senate Dist.:	28th
20	Consultant:	None	State House Dist.:	56th
21	Architect:	CSHQA, a Professional Association, Architectural and Engineering, P.C.	Years of Affordability(60 yr. Min):	60
22	Contractor:	CSDI Construction, Inc.	Target Population:	Family
23	Property Mgmt.:	Northwest Real Estate Capital Corp.		

**Project Description (brief narrative):**

Rehabilitation of a 37 unit (including one manager unit) multi-family apartment complex with a project-based Section 8 HAP contract. The complex was originally built in 1980 and is in need of repairs due to the amount of original equipment and fixtures still in service. There is only one other project based subsidized project in Klamath Falls. This rehabilitation will ensure that the High Valley complex stays available for the needs of the low income population for decades to come.

Project Name:	<b>Hollyfield Village Apartments</b>	No. of Units:	30
Project Address:	4077 Sunset Drive	County:	Clackamas
Project City/St/Zip:	Lake Oswego, OR 97035	US House Dist.:	05
Sponsor Name:	Northwest Housing Alternatives, Inc.	State Senate Dist.:	09
Consultant:	n/a	State House Dist.:	18
Architect:	eM/Zed Architecture	Years of Affordability(60 yr. Min):	60
Contractor:	Walsh Construction	Target Population:	Elderly
Property Mgmt.:	TBD		

**Project Description (brief narrative):**

The Hollyfield Village Apartments represents one of two affordable housing projects for seniors in Lake Oswego. The project was originally built in 1982 and will reach its 30 year term of affordability in early 2013. If NHA's planned acquisition and recapitalization does not occur at this time, the project will be at risk of converting to market rate apartments or condominiums. An award through the CFC application process will represent crucial financing to preserve and maintain this valuable resource in a community that lacks many affordable options for their senior population.

The project consists of 28 one bedroom apartments and 2 two bedroom apartments in one three-story elevator-served building. The project scope will provide a moderate rehabilitation of the site which will include the following: a new roof to deal with moisture intrusion; new gutters and downspouts; new siding and windows; new exterior paint; replacement of decks; seal coating and re-stripping of the parking lot; exterior lighting upgrades to reduce light pollution; updated bath and hood vent fans in unit interiors, new carpeting and hard surface coverings; updated plumbing fixtures including new bath cabinets, vanities, and faucets; new corridor carpeting and paint; modernization of the onsite manager office; a full elevator modernization and an extensive FFE program to replace outdated furniture and support the modernization of the entire complex.

Project Name:	<b>Lancaster Bridge Apartments</b>	No. of Units:	50
Project Address:	3384 NE Oxford Circle	County:	Benton
Project City/St/Zip:	Corvallis, Oregon 97333	US House Dist.:	4
Sponsor Name:	Willamette Neighborhood Housing Services (WHNS)	State Senate Dist.:	8
Consultant:	Housing Development Center	State House Dist.:	16
Architect:	Bergsund & Delaney	Years of Affordability(60 yr. Min):	60

1 Contractor:	Walsh Construction Company	Target Population:	Very low income families and individuals
2 Property Mgmt.:	The Neel Management Team		
3 Project Description (brief narrative):			
4 Lancaster Bridge provides 50 two, three and four bedroom townhouses and single-level accessible units for working families and individuals in Corvallis, at rents affordable to households making less than 50% of the median family income (MFI) for the area. Its rents are also 20-30% less than local market rents. Fifty-nine percent of households depend on income from wages, and make an annual average income of \$21,367 (31% of MFI). Eighty percent of households are headed by women, and 83 of the 160 residents are children.			
5 Completed in 1996, this LIHTC project is at the Year 15 exit of the original limited partner, preserving the property's reserves and limiting exit costs. While the project continues to provide needed affordable housing, the project has moisture problems that will require full building envelope replacement and new ventilation.			
6 In 2001, WNHS discovered moisture problems in the common walls of one building, located between four units and under the building's roof "valleys". WNHS hired a consultant to recommend mold remediation strategies and ways to prevent future problems. Walls were gutted, framing replaced, and mold remediated in the damaged building, and all 17 buildings were inspected for similar problems. A forensic building analysis found roof valleys in other buildings were also failing, and vinyl siding was improperly installed in some locations. Repairs to the damaged building were expensive and not covered by insurance due to exclusions in the policy, therefore reserves were depleted. WNHS has invested more than \$270,000 of their own resources in an attempt to address these issues. While WNHS has been diligent in their efforts to control the problems, these conditions cannot be addressed without rehabilitation with costs in excess of the project reserves or WNHS's organizational assets.			
7 WNHS has brought together an experienced team of professionals to inspect, analyze, and design a course of action to resolve the building envelope issues. The team brings expertise in construction (including building envelope assessment and mitigation), finance and environmental expertise. Under WHNS leadership, the work scope developed will include rehabilitation to bring Lancaster Bridge to a 30-year rehab standard through a total new investment of approximately \$130,000 per unit, enabling the project to provide its very low income residents with attractive, safe and affordable homes.			

16 Project Name:	<b>Willamette Place I &amp; II Meadow Glen Apartments Scattered Sites</b>	No. of Units:	80 units
17 Project Address:	4210 Marolf Place and 925 NE19 <sup>th</sup> Street	County:	Yamhill & Tillamook
18 Project City/St/Zip:	Tillamook, 97141 & McMinnville, 97128	US House Dist.:	1 <sup>st</sup> & 5 <sup>th</sup>
19 Sponsor Name:	Shelter Resources, Inc.	State Senate Dist.:	12 & 16
20 Consultant:	Kathleen McCusker	State House Dist.:	24 & 32
21 Architect:	Bergsund DeLaney Architecture and Planning	Years of Affordability(60 yr. Min):	60
22 Contractor:	Wm. R. Lovelace Construction, Inc.	Target Population:	Seniors and Family
23 Property Mgmt.:			

Project Description (brief narrative):

1 Acquisition, consolidation and rehabilitation of the Willamette Place I and Willamette Place II Apartments  
with a total of 48 units targeted for seniors who qualify under the USDA Rural Development Program.  
2 Project would be acquired with the Meadow Glen Apartments, a 32 unit family complex located in  
Tillamook, which was originally funded with USDA Rural Development 515 funds.

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**2012 CFC HOUSING COUNCIL REPORT**

Project Name:	Dethman Manor	No. of Units:	27
Project Address:	1205 Montello Ave.	County:	Hood River
Project City/St/Zip:	Hood River, OR 97031	US House Dist.:	2 <sup>nd</sup>
Sponsor Name:	Providence Health & Services	State Senate Dist.:	26
Consultant:	Housing Development Center	State House Dist.:	52
Architect:	GGLO	Years of Affordability(60 yr. Min):	60
Contractor:	LMC Incorporated	Target Population:	Elderly
Property Mgmt.:	Providence Health & Services		

**Project Description (brief narrative):**

Dethman Manor is a subsidized 27 unit senior housing project in Hood River, Oregon, owned by Providence Health & Services. The project was originally built in 1978 and financed with an OHCS mortgage and a 30-year Section 8 contract on all of the units.

The mortgage was fully repaid and the original Section 8 contract expired in 2008. Providence has since renewed the Section 8 contract on an annual basis, but is interested in a long-term renewal, provided it can secure capital funds to renovate the building. Providence has hired the Housing Development Center to assist with a recapitalization and rehabilitation efforts.

**Project and Unit Information: ("X" all boxes which apply)**

<input type="checkbox"/>	New Construction	<input checked="" type="checkbox"/>	Multi-Family Rental Housing	<input checked="" type="checkbox"/>	Elderly/Disabled
<input type="checkbox"/>	Acquisition	<input type="checkbox"/>	Single-Family Housing	<input checked="" type="checkbox"/>	Independent Living
<input checked="" type="checkbox"/>	Rehabilitation	<input type="checkbox"/>	Homeless Shelter	<input type="checkbox"/>	Modular Units
<input type="checkbox"/>	Vacant	<input type="checkbox"/>	Transitional Housing	<input type="checkbox"/>	Congregate/Assisted Living
<input type="checkbox"/>	Occupied	<input type="checkbox"/>	Group Home: _____ (# units)	<input type="checkbox"/>	SRO

If rehabilitation, year built: 1978

<input type="checkbox"/>	Family	<input type="checkbox"/>	Persons with HIV/AIDS	<input type="checkbox"/>	Alcohol/Drug Recovery
<input checked="" type="checkbox"/>	Elderly	<input type="checkbox"/>	Psychiatrically Disabled (CMI)	<input type="checkbox"/>	Ex-Offenders
<input type="checkbox"/>	Physically Disabled	<input type="checkbox"/>	Developmentally Disabled	<input type="checkbox"/>	Homeless
<input type="checkbox"/>	Farmworkers	<input type="checkbox"/>	Permanent Supportive Hsg.	Other: _____	
<input type="checkbox"/>	Transitional housing	<input type="checkbox"/>	Victims of Domestic Violence	Other: _____	

<input type="checkbox"/>	<u>3</u> Number of units accessible to the disabled	<u>27</u> Number of units that will be visitable
<input type="checkbox"/>	Number of transitional housing units	Number of beds, i.e., group home or dormitory
<input type="checkbox"/>	Number of internet connections in	Number of units with high speed internet

1 \_\_\_\_\_ community building \_\_\_\_\_  
 2 \_\_\_\_\_ \_\_\_\_\_

3 **Proposed Sources and Uses**

Uses:	\$ Amount	Sources:	\$ Amount
Acquisition	\$0	HOME	\$ 750,000
Construction/Rehab	\$ 1,124,542	Perm Loan/OAHTCs	\$ 415,716
Development	\$ 430,798	Trust Fund	\$ 500,000
Temporary Relocation	\$ 101,572	Weatherization	
Reserves	\$ 186,303	HELP	
		Tax Credit Equity	
		Deferred Developers Fee	
		Sponsor Contribution	\$ 164,000
		Enterprise Green Pilot	\$ 13,500
		Other:	
		Other:	
<b>Total:</b>	<b>\$ 1,843,216</b>	<b>Total:</b>	<b>\$ 1,843,216</b>

Use	Total Cost	Cost per Unit	Cost per S.F.
Residential	\$ 1,843,216	\$ 68,267	\$ 48.39
Commercial	\$	\$	\$
<b>Total Cost</b>	<b>\$ 1,843,216</b>	<b>\$ 68,267</b>	<b>\$ 48.39</b>

15 **Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):**

Proposed Improvements	Description	Comments
<b>Exterior:</b>		
Siding	Hardi lap siding	Replacing existing vinyl
Windows	Pella fiberglass	Replacing original 34-year old aluminum windows
Doors	New exterior doors	Installing new steel, welded frame metal doors
<b>Interior:</b>		
Heating/cooling	PTHPs	Replacing base board heat and tenant-owned window A/C units.
Safety	Installing fire sprinklers throughout	To improve safety of the residents.
Plumbing	New water saving toilets, faucets and showerheads	Per OHCS green building guidelines

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Lighting	New energy star lighting throughout	
Common areas	New flooring and upgrades to community room and office	Replace common kitchen cabinets and appliances, replace sliding doors with new fiberglass French doors, reconfigure office to allow better sight of entrance.
Therman	Increase attic insulation	
<b>General:</b>		
Site	Correct grading and landscaping	Direct water away from the building and trim/replace overgrown plant material

Yes (x)    No (x)    N/A (x)

For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or exceeds OHCS's 30-year sustainability requirement.

      

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**Relocation Plan (if applicable):**

The rehab scope was developed to have as little impact on the residents as possible, while still addressing capital needs. Since this is a Section 8 project, there will be no permanent relocation because all residents are income qualified. We do expect varying levels of temporary displacement while the work is being completed, which is more fully described below. Any temporary relocation will comply with URA guidelines. Management has issued General Information Notices to all tenants, and will continue to keep the residents apprised of efforts to obtain funding and renovate the project through required notifications.

Since most of the work is on the building exterior, with a limited interior scope, the tenants will be given the option to relocate offsite, remain in their unit, spend the day in the community room, or participate in offsite activities arranged by management. Any tenant that wishes to be temporarily relocated offsite for all or part of the work will be accommodated and we have budgeted accordingly. Whether a tenant moves offsite or remains onsite for the duration of the work, Providence and HDC will coordinate movers to ensure personal belongings are secure and out of the way. The relocation budget also includes this cost.

For tenants that choose to remain onsite during the work, Providence and HDC will coordinate activities and meals in the community room. Since these tenants will spend working hours in the community rooms and return to their units in the evening, the contractor has been given specific instructions to make sure units are safe if there is work in progress at the end of the day.

**Proposed Rents:**

Unit Size(s)	# of Units	% Area Median Income	Proposed Rent
1-Bedroom	27	30%-50% (Preference for 30%)	\$ 728 (Contract Sect 8 rent)
2-Bedroom			\$
3-Bedroom			\$
-Bedroom (Mgrs.)			\$

**2 Proposed Annual Operating Budget:**

1	Gross Potential Income (inc. other income)	\$ 216,410
3	Vacancy: 5%	(\$10,821)
4	Effective Gross Income	\$ 205,590
	Operating Expenses	(\$162,607)
5	Net Operating Income	\$ 42,983
6	Debt Service/Loan Amt.	
	Rate: 2.75%	
7	Term: 15 years	
	Annual Payment:	\$ 23,013
8	Total Debt Service	\$ 23,013
9	Annual Cash Flow	\$ 19,970
10	DCR	1.87*

\*beginning DCR is high because it declines over time. DCR in year 15 is 1.10, refinance is expected.

11 **Market Demographics: (Provide bullet points under each area)**

2	Economy:	<ul style="list-style-type: none"> <li>• Stable with moderate population growth.</li> </ul>
3	Job Growth:	<ul style="list-style-type: none"> <li>• Some job growth in the service industry and small technology companies.</li> </ul>
4	Supply:	<ul style="list-style-type: none"> <li>• Limited subsidized housing available for residents earning less than 30% of area median income.</li> <li>• Vacancy rates are low throughout the market, suggesting pent up demand.</li> </ul>
5	Demand:	<ul style="list-style-type: none"> <li>• Historical operations suggest consistent demand for units at Dethman.</li> <li>• The project has had little vacancy in the 34 years it has been operating.</li> <li>• Management maintains a waiting list that includes individuals from the community and as far away as Portland.</li> </ul>

8	Sponsor Experience:	<ul style="list-style-type: none"> <li>• Providence has owned and operated subsidized senior housing for over 27 years.</li> <li>• In addition to Dethman, its portfolio consists of 12 Section 202 projects in Oregon, Washington and California, and one mixed finance LIHTC/202 project under construction in White Center, WA.</li> <li>• Providence also operates many assisted living facilities in markets where it has a hospital presence.</li> </ul>
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22	Proposed Resident Services:	<ul style="list-style-type: none"> <li>• Resident services at Dethman Manor currently, and will continue to focus on four key areas: a) resident health b) social activities c) recreational activities d) educational activities.</li> </ul>
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<p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p>	<ul style="list-style-type: none"> <li>• When a resident first moves into Dethman Manor, their needs may be for social and recreational activities. As they age in place, they may develop greater health care needs.</li> <li>• The average age is currently 67 years old at Dethman.</li> <li>• Some of the residents are very active and participate in mostly social, educational and preventative care programs. The goal of services to these residents is to enhance quality of life, to facilitate community within the building and to make sure residents are taking the necessary steps to maintain independence as long as possible.</li> <li>• Many other residents at Dethman are frail and have declining health. Services offered to these residents tend to be centered around medical care, regular screenings, and meal delivery. Goals include reducing the number of emergency room visits, and making sure residents have regular contact with family, friends</li> </ul>
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<p>9 OHCS Funds Reserved:</p>	<p>\$500,000 HDGP, \$750,000 HOME, \$415,716 OAHTC</p>
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<p>10 Recommended Motion:</p> <p>11</p>	<p>To approve an HDGP grant in an amount up to \$500,000 and a HOME grant in an amount up to \$750,000 to Providence Health and Services for the rehabilitation of the Dethman Manor located in Hood River, Oregon. Award is contingent on meeting all program requirements and conditions of award.</p>
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 2 Farmworkers  X  Permanent Supportive Hsg. Other: \_\_\_\_\_  
 3 Transitional housing \_\_\_\_\_ Victims of Domestic Violence Other: \_\_\_\_\_  
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 5 2 Number of units accessible to the disabled  29  Number of units that will be visitable  
 6 Number of transitional housing units \_\_\_\_\_ Number of beds, i.e., group home or dormitory  
 7 Number of internet connections in community building \_\_\_\_\_ Number of units with high speed internet

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**Proposed Sources and Uses**

7 Uses:	\$ Amount	Sources:	\$ Amount
8 Acquisition	\$1,608,000	Trust Fund	\$ 500,000
9 Construction/Rehab	\$2,262,025	Weatherization	\$ 159,129
10 Development	\$ 796,138	Deferred Developers Fee	\$ 122,000
11		Other: PHB HOME	\$2,815,034
12		Other: PHB -- Lead	\$ 170,000
13 Total:	\$4,666,163	Other: NOAH	\$ 900,000
		Total:	\$4,666,163

14 Use	Total Cost	Cost per Unit	Cost per S.F.
15 Residential	\$4,666,163	\$150,521	\$202.21
Commercial	\$	\$	\$
Total Cost	\$4,666,163	\$150,521	\$202.21

16 **Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):**

17 Proposed Improvements	Description	Comments
18 <b>Exterior:</b>		
19 Roof	Full replacement	Current roof over 20 years old. New will be 40 year
20 Siding	Full replacement	Full rain-screen, Hardi lap siding
21 Windows/doors	Full replacement	High energy efficient
22 Walkways	Selective Replacement	ADA access and safety improvements
23 Other	Landscape	Grading, small retaining walls, security improvements
<b>Interior:</b>		
24 Electrical	Fixtures and outlets	Bring up to code and Energy Star fixtures
25 Fixtures	Toilets and sinks	Energy efficient models

1	Floorcoverings	Laminate in living, carpet in bedrooms	Long-life and low VOC.
	Cabinetry	Replace all old	Remove old particle board and replace with solid box formaldehyde free
	Insulation	Attic, crawl and walls	Increase to meet/exceed code
	ADA	2 fully ADA units	Two units and common areas ADA accessible.
	<b>General:</b>		
	Safety	Improved lighting, stair and railings to code	Replace old exterior stairs and bring all railings up to code.
	Community	Covered picnic area and raised bed garden spaces	Create a community space in courtyard and install raised bed gardens

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Yes (x)    No (x)    N/A (x)

For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or exceeds OHCS's 30-year sustainability requirement.




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**Relocation Plan (if applicable):**

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Portland Housing Bureau HOME funds will be used in the project, so URA or 104 (d) guidelines will be used in determining relocations benefits and process for all residents. A Relocation Specialist will be hired. Oversight will be by ROSE CDC Asset Manager.

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Tenant interviews will be conducted to determine the current situation and needs of each household. Based on these interviews, an individualized relocation plan will be developed and discussed with each household. All displaced residents will be entitled to receive timely, clear and accurate notices, and advisory services.

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Permanently relocated residents will be entitled to either (1) the reasonable cost to cover the services of a moving company to pack (if necessary) and move their belongings; or (2) a cash payment as stipulated by URA schedule. These residents will also be entitled to rent differential payments equaling the difference between their existing gross rent and the gross rent of a documented comparable unit. The formula for calculation replacement housing payments will be based on assistance for a 42 month period, paid in installments.

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Temporarily relocated residents will be entitled to either (1) the reasonable cost to cover the services of a moving company to pack (if necessary), temporarily store, and move their belongings; or (2) a cash payment as stipulated by URA schedule. Temporarily relocated residents will also receive a per diem reimbursement for the cost of food and other incidentals while displaced.

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**Proposed Rents:**

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Unit Size(s)	# of Units	% Area Median Income	Proposed Rent
1-Bedroom	4	30	\$ 319
1-Bedroom	9	45	\$ 523
1-Bedroom	7	50	\$ 585
2-Bedroom	3	30	\$ 378

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2-Bedroom	4	45	\$ 630
2-Bedroom	4	50	\$ 700

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**Proposed Annual Operating Budget:**

Gross Potential Income	\$ 207,584
Vacancy: 5%	(\$10,379)
Effective Gross Income	\$ 197,205
Operating Expenses	(138,035)
Net Operating Income	\$ 59,170
Debt Service/Loan Amt.	\$ 900,000
Rate: 2.5%	
Term: 20 years	
Annual Payment:	\$ 48,451
Total Debt Service	\$ 48,451
Annual Cash Flow	\$ 10,719
DCR	1.22

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**Market Demographics: (Provide bullet points under each area)**

Economy:	<ul style="list-style-type: none"> <li>Extremely tight rental housing market</li> <li>Portland has second lowest vacancy rate in nation (for large cities)</li> </ul>
Job Growth:	<ul style="list-style-type: none"> <li>High unemployment.</li> <li>Slow recovery from recession</li> </ul>
Supply:	<ul style="list-style-type: none"> <li>Limited options</li> <li>Much of existing outer southeast stock is in poor to very poor condition</li> </ul>
Demand:	<ul style="list-style-type: none"> <li>More than 3,000 households in Lents Urban Renewal Area earn less than \$30,000 annually</li> <li>Shortage of affordable units in primary market area expected to grow to 2000 by 2014</li> <li>Majority of neighborhood households consist of one or two persons</li> </ul>

Sponsor Experience:	<ul style="list-style-type: none"> <li>ROSE has 20 years' of experience in developing and operating affordable rental housing</li> <li>ROSE has specialized in the acquisition/rehabilitation of 1970s garden-style apartments</li> </ul>
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Proposed Resident Services:	<ul style="list-style-type: none"> <li>ROSE offers extensive core residential services including information and referral, eviction prevention, after-school and family programs</li> </ul>
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	<ul style="list-style-type: none"><li>• Permanent supportive housing for veterans (Veterans Administration), at-risk families (Impact Northwest) and homeless (JOIN)</li><li>• Multi-cultural ROSE staff speaks Spanish, Chinese, Russian and Vietnamese</li></ul>
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# OHCS Funds Reserved:	HDGP \$500,000; OAHTC \$900,000; LIWP \$159,129
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Recommended Motion:	To approve a HDGP grant in an amount up to \$500,000 to ROSE Community Development for the acquisition/rehabilitation of Greenview Terrace Apartments located in Portland, Oregon. Award is contingent on meeting all program requirements and conditions of award.
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**2012 CFC HOUSING COUNCIL REPORT**

Project Name:	Kehillah Housing	No. of Units:	15
Project Address:	6125 SW Boundary Street	County:	Multnomah County
Project City/St/Zip:	Portland, OR 97221	US House Dist.:	1
Sponsor Name:	Robison Jewish Home dba Cedar Sinai Park	State Senate Dist.:	18
Consultant:	Housing Development Center	State House Dist.:	36
Architect:	Bruce Sternberg	Years of Affordability(60 yr. Min):	60
Contractor:	R&H Construction	Target Population:	Adults with Developmental Disabilities
Property Mgmt.:	Self-Managed		

**Project Description (brief narrative):**

Cedar Sinai Park (CSP) seeks \$360,000 from the Housing Development Grant Program to complete the financing package for Kehillah Housing, a new 15 unit affordable housing project in SW Portland. Kehillah Housing will provide a rare independent living opportunity for adults with developmental disabilities. This will include those with Downs Syndrome, mental retardation, autism and other pervasive developmental disabilities. Through an agreement with the Portland Housing Bureau, two of the units will be set aside as permanent supportive housing for individuals who are homeless or at risk of homelessness.

Kehillah Housing has secured 90% of the financing needed for its completion, including \$1.9 million from the HUD Section 811 Program. CSP has raised more than 25% of project financing through a capital campaign alone. These donations will provide for a building richer in resident amenities than is typically possible in a HUD-funded development. The building has a large community space and common kitchen, a large outdoor patio, and generous internal circulation with indoor seating areas to encourage socializing and combat isolation. All of the private donations raised to date are fully funded. With the funding requested from OHCS, Kehillah Housing will be 100% funded. A grant commitment by OHCS will ensure the project's speedy completion and provide affordable housing to this high priority population.

Kehillah Housing will be targeted primarily to single adults who earn about 16% of median family income (MFI). Most residents will rely upon Supplemental Security Income (SSI) as their sole source of income, currently \$8,386 per year in Multnomah County. Kehillah Housing will offer these very low-income residents an array of services that support their ability to live independently in the community. Rental subsidies will be provided by HUD through a Project Rental Assistance Contract, ensuring residents will pay no more than 30% of income towards rent and utilities.

Kehillah Housing's supportive services and life skills training will promote the residents' ability to keep and maintain their housing, while fostering opportunities for independence. Services are intended to address the areas in which adults with developmental disabilities need the most assistance. Resident services will be provided through brokerage agencies under contract to the Oregon Department of Human Services. Multnomah County will screen residents for service eligibility valued between \$11,000 to \$14,000 per person per year.

Kehillah Housing has been designed to support and facilitate resident growth. Kehillah Housing will be a

new, two-story building with independent living apartments, each with a full bath and kitchen. Kehillah Housing is visitable throughout. Two living units and all common areas will be fully accessible. Common sitting areas and a community room with a kitchen will provide space for parties, family/friend gatherings,, meetings and classes. Outdoor amenities include a community garden, patio and barbeque. Residents will have access to the Cedar Sinai Park campus, which includes extensive green space and mature trees.

Project and Unit Information: ("X" all boxes which apply)

<input checked="" type="checkbox"/>	New Construction	<input checked="" type="checkbox"/>	Multi-Family Rental Housing	<input checked="" type="checkbox"/>	Elderly/Disabled
<input type="checkbox"/>	Acquisition	<input type="checkbox"/>	Single-Family Housing	<input checked="" type="checkbox"/>	Independent Living
<input type="checkbox"/>	Rehabilitation	<input type="checkbox"/>	Homeless Shelter	<input type="checkbox"/>	Modular Units
<input type="checkbox"/>	Vacant	<input type="checkbox"/>	Transitional Housing	<input type="checkbox"/>	Congregate/Assisted Living
<input type="checkbox"/>	Occupied	<input type="checkbox"/>	Group Home: _____ (# units)	<input type="checkbox"/>	SRO

If rehabilitation, year built: \_\_\_\_\_

<input type="checkbox"/>	Family	<input type="checkbox"/>	Persons with HIV/AIDS	<input type="checkbox"/>	Alcohol/Drug Recovery
<input type="checkbox"/>	Elderly	<input type="checkbox"/>	Psychiatrically Disabled (CMI)	<input type="checkbox"/>	Ex-Offenders
<input type="checkbox"/>	Physically Disabled	<input checked="" type="checkbox"/>	Developmentally Disabled	<input type="checkbox"/>	Homeless
<input type="checkbox"/>	Farmworkers	<input type="checkbox"/>	Permanent Supportive Hsg.	Other:	DD and Homeless or At-Risk of Homelessness
<input type="checkbox"/>	Transitional housing	<input type="checkbox"/>	Victims of Domestic Violence	Other:	_____

<input type="checkbox"/>	<u>2</u> Number of units accessible to the disabled	<input type="checkbox"/>	<u>15</u> Number of units that will be visitable
<input type="checkbox"/>	Number of transitional housing units	<input type="checkbox"/>	Number of beds, i.e., group home or dormitory
<input type="checkbox"/>	Number of internet connections in community building	<input type="checkbox"/>	Number of units with high speed internet

Proposed Sources and Uses

Uses:	\$ Amount	Sources:	\$ Amount
Acquisition	\$ 1	HOME	
Construction/Rehab	\$ 2,588,074	Perm Loan/OAHTCs	
Development	\$ 775,525	Trust Fund	\$ 360,000
		Weatherization	
		HELP	
		Tax Credit Equity	
		Deferred Developers Fee	
		Other: HUD 811	\$ 1,878,600

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<b>Total:</b>	<b>\$ 3,363,600</b>

Other: City of Portland CDBG	\$ 275,000
Other: Private Donations	\$ 850,000
Other:	
<b>Total:</b>	<b>\$ 3,363,600</b>

Use	Total Cost	Cost per Unit	Cost per S.F.
Residential	\$ 3,363,600	\$ 224,240	\$ 248
Commercial	\$	\$	\$
<b>Total Cost</b>	<b>\$ 3,363,600</b>	<b>\$ 224,240</b>	<b>\$ 248</b>

**Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):**

Proposed Improvements	Description	Comments
<b>Exterior:</b>		
Siding	Cementitious siding	The exterior siding will be a combination of lap siding and panel with battens.
Windows	Extruded vinyl	Sound attenuated windows will be installed on the façade facing the Beaverton Hillsdale Highway.
Roof	Asphalt composition roof	The roof will feature skylight openings to 2 <sup>nd</sup> floor common areas.
<b>Interior:</b>		
Appliances	Range, range hood, refrigerator and dishwasher	Energy Star appliances where applicable.
Flooring	Vinyl, carpet	Vinyl plank flooring in baths and living areas, carpet in bedrooms.
<b>General:</b>		
Site	Courtyard plaza, outdoor patio and gardens, bike parking	Outdoor patio will offer amenities including landscaped areas, garden beds, rainwater bioswales and seating areas.
Sustainability	Indoor air quality, durability	Indoor air quality will be a major focus of sustainability efforts. The team will also focus on durable building materials such as cementitious siding, vinyl plank flooring and quality windows.

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Yes (x)    No (x)    N/A (x)

For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or exceeds OHCS's 30-year sustainability requirement.

      

Relocation Plan (if applicable):

N/A

**Proposed Rents:**

Unit Size(s)	# of Units	% Area Median Income	Proposed Rent
1-Bedroom	14	50%	30% of resident income less utility allowance
2-Bedroom			\$
3-Bedroom			\$
1-Bedroom (Mgrs.)	1	Not applicable	\$ 623 net rent

**Proposed Annual Operating Budget:**

Gross Potential Income	\$ 73,129
Vacancy: 3% (per HUD requirements)	(\$2,194)
Effective Gross Income	\$ 70,935
Operating Expenses	(\$70,205)
Net Operating Income	\$ 730 (Cash flow to owner is restricted by HUD)
Debt Service/Loan Amt.	
Rate: 0.00%	
Term:    years	
Annual Payment:	\$
Total Debt Service	\$
Annual Cash Flow	\$ 730
DCR	N/A

Market Demographics: (Provide bullet points under each area)

Economy:	<ul style="list-style-type: none"> <li>The economy consists of many retail, service and manufacturing businesses. The property is located within the City of Portland, which is a significant economic market.</li> </ul>
Job Growth:	<ul style="list-style-type: none"> <li>Various studies have projected annual job growth in the metro area at around 10% over the next ten years. Given that Portland is the largest metro area in the state, job growth is expected to be comparable or exceed expectations at the state level.</li> </ul>

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<p>2 Supply:</p> <p>3</p> <p>4</p> <p>5</p>	<ul style="list-style-type: none"> <li>• Kehillah Housing is the only development of its kind, existing or proposed, in Multnomah County. The project most similar to Kehillah Housing within the Portland Metropolitan Area is the independent living project Pioneer Abodes, located 12.5 miles from the project site, and managed by Portland Habilitation Center. While Pioneer Abodes offers nine units of independent living, no support services are provided on-site, and outside services must be coordinated independently. Pioneer Abodes is fully occupied and has a 200-person wait list that was recently purged to 26, with an average wait time of 3-5 years.</li> </ul>
<p>6 Demand:</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p> <p>11</p> <p>12</p>	<ul style="list-style-type: none"> <li>• According to Multnomah County Developmental Disabilities Services (DDS), there are 1,466 adults currently enrolled with brokerages providing services to developmentally disabled adults through the County system as of March, 2012. DDS staff also indicated subsidized housing and supportive services would likely be of interested to an estimated 50% of the 165 persons currently living in "Support Services." This brings the total pool of potential applicants for Kehillah Housing to 1,548 adults in Multnomah County. Multnomah County DDS estimated that 15% percent of this pool would likely choose to live independently, if options were affordable and available. Based upon other data provided by the County, it is estimated that 82% of adults with developmental disabilities in the DDS brokerage would be income qualified to live at Kehillah Housing. This would put the total number of adults with developmental disabilities who were income-qualified and interested in becoming a single-person household very conservatively at 190 people.</li> </ul>

<p>13 Sponsor Experience:</p> <p>14</p> <p>15</p> <p>16</p> <p>17</p> <p>18</p> <p>19</p> <p>20</p>	<p>Established in 1920 as Robison Jewish Home, Cedar Sinai Park is a 501(c)3 tax-exempt public benefit organization. It has a 90-year history and unqualified reputation for providing high-quality residential and community-based care to elders and adults with special needs, allowing them to live with comfort, independence and dignity. Cedar Sinai Park (CSP) delivers a broad-based continuum of care tailored to individuals' unique needs. Services consist of affordable housing for seniors and people with disabilities, assisted living, independent living, skilled nursing care, residential care, and adult day services. CSP's geographic service area includes the Greater Portland-Metro area. CSP has also collaborated with Jewish Family &amp; Child Service to establish Sinai Family Home Services, a not-for-profit in-home care agency.</p> <p>Cedar Sinai Park has developed or preserved, owns and manages over 460 units of housing. In additional, CSP owns and operates supportive housing facilities for seniors and people with disabilities, assisted living, skilled nursing care, residential care, and adult day service facilities. Over half of CSP's housing units are part of a HUD Project-Based Section 8 funded program and serve older adults and people with disabilities.</p>
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<p>21 Proposed Resident Services:</p> <p>22</p> <p>23</p>	<p>The following are some of the individualized services that residents may receive:</p> <ul style="list-style-type: none"> <li>• <b>Independent Living:</b> Support services will be available to assist residents in developing or maintaining skills that promote independent living.</li> <li>• <b>Nutrition:</b> Meals will be available through Cedar Sinai Park, and residents</li> </ul>
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	<p>will be assisted in developing nutritious menus and shopping plans.</p> <ul style="list-style-type: none"><li>• <b>Hygiene and Personal Appearance:</b> Daily support will be available to assist residents in developing or maintaining personal hygiene.</li><li>• <b>Community Inclusion:</b> Residents will have opportunities to participate in integrated activities which facilitate independence, promote community inclusion, and support a meaningful contribution to society.</li><li>• <b>Medication Management:</b> Services will be made available to provide residents with medication management assistance.</li><li>• <b>Behavioral Support:</b> Behavioral supports offer training and consultation in self-control, self-calming, behavior change, anger management, relationships, sensory stimulation, and social responsiveness.</li><li>• <b>Employment Support:</b> Residents will obtain support in finding employment and/or volunteer opportunities based on their individual strengths and goals.</li><li>• <b>Socialization:</b> Residents will have access to many services that support the development or maintenance of self-awareness and self-control, social responsiveness, and interpersonal skills.</li></ul>
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OHCS Funds Reserved	\$360,000
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Recommended Motion:	To approve a HDGP grant in an amount up to \$360,000 to the Robison Jewish Home dba Cedar Sinai Park for the new construction of Kehillah Housing located in Portland, Oregon. Award is contingent on meeting all program requirements and conditions of award.
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**2012 CFC HOUSING COUNCIL REPORT**

Project Name:	CSI GP.HM. CORNELL RD.	No. of Units:	One
Project Address:	1385 N.E. Cornell Rd	County:	Washington
Project City/St/Zip:	Hillsboro, OR. 97124	US House Dist.:	01
Sponsor Name:	Community Services, Inc. (CSI)	State Senate Dist.:	15
Consultant:	NA	State House Dist.:	26
Architect:	Bruce Kenny, AIA. SE	Years of Affordability(60 yr. Min):	60
Contractor:	Jose Contreras	Target Population:	Developmentally
Property Mgmt.:	NA	Disabled – Prader Willi Syndrome	

**Project Description (brief narrative):**  
 This project includes acquisition of a house on 0.45 acres in suburban Hillsboro, for which CDBG funding is awarded. The current house will be demolished to the floor joists/foundation and rebuilt to integrate it with a 2,200 Sq. foot addition that will result in a 3,875 sq. ft. house including five bedrooms, all of which will be ADA compliant in order to serve five behaviorally and medically challenged persons whose developmental disability is caused by a genetic dysfunction called Prader Willi Syndrome. Residents will require 24/7 staff services.

**Project and Unit Information: ("X" all boxes which apply)**

- |                                                      |                                                                    |                                                     |
|------------------------------------------------------|--------------------------------------------------------------------|-----------------------------------------------------|
| <input checked="" type="checkbox"/> New Construction | <input type="checkbox"/> Multi-Family Rental Housing               | <input type="checkbox"/> Elderly/Disabled           |
| <input checked="" type="checkbox"/> Acquisition      | <input type="checkbox"/> Single-Family Housing                     | <input type="checkbox"/> Independent Living         |
| <input checked="" type="checkbox"/> Rehabilitation   | <input type="checkbox"/> Homeless Shelter                          | <input type="checkbox"/> Modular Units              |
| <input checked="" type="checkbox"/> Vacant           | <input type="checkbox"/> Transitional Housing                      | <input type="checkbox"/> Congregate/Assisted Living |
| <input type="checkbox"/> Occupied                    | <input checked="" type="checkbox"/> Group Home: <u>1</u> (# units) | <input type="checkbox"/> SRO                        |

If rehabilitation, year built: 1945

- |                                                         |                                                                    |                                                |
|---------------------------------------------------------|--------------------------------------------------------------------|------------------------------------------------|
| <input type="checkbox"/> Family                         | <input type="checkbox"/> Persons with HIV/AIDS                     | <input type="checkbox"/> Alcohol/Drug Recovery |
| <input type="checkbox"/> Elderly                        | <input checked="" type="checkbox"/> Psychiatrically Disabled (CMI) | <input type="checkbox"/> Ex-Offenders          |
| <input checked="" type="checkbox"/> Physically Disabled | <input checked="" type="checkbox"/> Developmentally Disabled       | <input type="checkbox"/> Homeless              |
| <input type="checkbox"/> Farmworkers                    | <input type="checkbox"/> Permanent Supportive Hsg.                 | Other: _____                                   |
| <input type="checkbox"/> Transitional housing           | <input type="checkbox"/> Victims of Domestic Violence              | Other: _____                                   |

1 Number of units accessible to the disabled 1 Number of units that will be visitable  
5 Number of transitional housing units 5 Number of beds, i.e., group home or dormitory

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2 1 Number of internet connections in community building

1 Number of units with high speed internet

3 **Proposed Sources and Uses**

4 Uses:	\$ Amount	Sources:	\$ Amount
Acquisition	\$180,000	Trust Fund	\$255,000
5 Construction/Rehab	\$380,400	Weatherization	\$ 62,189
6 Development	\$ 37,950	HELP	\$ 25,000
		Other: Sponsor-gift time	\$ 4,500 staff time
		Other: Sponsor-cash	\$ 99,161
		Other: CDBG WA County	\$150,000
		Other: Rebuild Together	\$ 2,500
9 Total:	\$598,350	Total:	\$598,350

10 Use	Total Cost	Cost per Unit	Cost per S.F.
Residential	\$598,350	\$598,350	\$154.41
11 Commercial	\$0	\$0	\$0
12 Total Cost	\$598,350	\$598,350	\$154.41

13 **Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):**

14 Proposed Improvements	Description	Comments
15 <b>Exterior:</b>		
Reinforce Foundation	Add Found.+ Post & Piers	Cost to salvage more than to rebuild
16 Replace 4 inch walls	Exterior Bearing +Insulate	New walls all insulation 6 inch load bearing for new roof
17 Demo Stick Frame Roof	Restructure - prebuilt	Current roof is irregular & not compatible w/ new addition
18 Remove 1945 Windows	Replace w/ > 3.0 U value	Salvage windows is not energy effective
19 Utility Supply lines	Excavate & replace	Bring Electric, water, sewer, HVAC to code
<b>Interior:</b>		
20 Demo all existing walls	New design for ADA use	Joists and foundation of existing remain
21 Create efficient logistics	Design for client support	Design maintains warmth & home-like ambiance
Demo all utilities	Replace w energy efficient	All utilities are insufficient and old
22 Client need design driven	Accessibility to clients	Wheel chair ramps to exterior doors + Wheel chair shower

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2 Add Fire Sprinkler + Smoke	Bring to code for SR-3	Safety of clients drives new infrastructure needs
3 <b>General:</b>		
4 Parking for staff vehicles	Loading area for clients	This site needs off-street parking for eight vehicles
5 Spatially a good fit for area	Separation from neighbors	This large suburban lot is an excellent fit for Project

Yes (x) No (x) N/A (x)

6 For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or exceeds OHCS's 30-year sustainability requirement.

X

7 Relocation Plan (if applicable):
8 House is vacant

9 **Proposed Rents:**

10 Unit Size(s)	# of Units	% Area Median Income	Proposed Rent
11 SSA Rules Govern			
12 SSI only can be used	1-5 Bedroom group home	< 30 % of poverty	SSI=\$202/mo./person

12 **Proposed Annual Operating Budget:**

13 Gross Potential Income	\$ 373,546 year one
14 Vacancy: 0.5% (0.05) State pays vacancy fund	(1,868 )
15 Effective Gross Income	\$371,678
16 Operating Expenses	\$368,253
17 Net Operating Income	\$3,425
18 Debt Service/Loan Amt.	NA
19 Rate:	
20 Term:	
21 Annual Payment:	
22 Total Debt Service	
23 Annual Cash Flow	
DCR	NA

21 **Market Demographics: (Provide bullet points under each area)**

22 Economy:	<ul style="list-style-type: none"> <li>• Developmental Disability income is federal / state ear-marked tax money</li> </ul>
23 Job Growth:	<ul style="list-style-type: none"> <li>• State adjustment to tax base revenue impacts Medicaid-based match formula</li> </ul>

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Supply:	<ul style="list-style-type: none"><li>• Supply of ADA, fire-sprinkled group homes does not meet the need.</li><li>• OHCS data from 2010 shows 8,148 developmentally disabled clients in the Region 1 DD area: Current (03/2012) data reported by county = 7,885 case management eligible DD citizens of whom 1,217 live in Group Homes, 1,265 live in adult foster care + 239 in supported living, leaving 5,164 DD adults and children either living in family homes or in other settings. Many of these will need to move into more intensive housing arrangements.</li></ul>
Demand:	<ul style="list-style-type: none"><li>• See above data regarding Supply/Demand relationship</li></ul>
Sponsor Experience:	<ul style="list-style-type: none"><li>• Community Services, Inc. has done five previous CDBG+OHCS-funded DD group home projects in the last 12 years. They now operate 18 DD group homes + vocational services and has operated such projects since November 1988.</li><li>• The Community Services CEO has 30+ years of experience building and managing non-profit hospitals and medical centers.</li><li>• If the requested Trust Fund is awarded to this project, they will proceed immediately including filing for building permits by July 1, 2012, completing the acquisition procedures / closing by August 1<sup>st</sup>, going out for construction bids in July &amp; sign contract in August 2012 to commence work then.</li></ul>

Proposed Resident Services:	This project, as with the existing 18 group homes now operated, will provide 24/7 awake staff for comprehensive care services for five DD residents. Services include care for all activities of daily living, social, medical, financial, transportation. Basically, all activities needed to ensure health, safety and welfare of residents.
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OHCS Funds Reserved:	HDGP \$255,000; HELP \$25,000; LIWP \$62,189
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Recommended Motion:	To approve a HDGP grant in an amount up to \$255,000, a HELP grant in an amount up to \$25,000, and a LIWP grant in an amount up to \$62,189 to Community Services, Inc. for the acquisition/rehabilitation and new construction of the CSI GP HM Cornell Rd located in Hillsboro, Oregon. Award is contingent on meeting all program requirements and conditions of award.
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**2012 CFC HOUSING COUNCIL REPORT**

Project Name:	Farmington Meadows Apartments	No. of Units:	69
Project Address:	4566 SW 160 <sup>th</sup> Avenue	County:	Washington
Project City/St/Zip:	Aloha, OR 97007	US House Dist.:	1
Sponsor Name:	Guardian Development LLC	State Senate Dist.:	14
Consultant:		State House Dist.:	28
Architect:	Carleton Hart Architecture	Years of Affordability(60 yr. Min):	60
Contractor:	LMC Construction	Target Population:	Low income families
Property Mgmt.:	Guardian Management LLC		

**Project Description (brief narrative):**

Farmington Meadows was originally built in 1982, and has 100% project-based Section 8 subsidies that are expiring in November 2012. Subsidies are at risk of loss if Guardian is not able to obtain funding to Preserve this property. The 69-unit project, built on 4.24 acres in Aloha, is home to low-income seniors and families, and includes 1-, 2- and 3-bedroom units in seven buildings. The current owner would like to sell the property due to over-leveraged debt and significant rehab (deferred maintenance) needs. Guardian proposes to Preserve this property in order to retain much needed affordable housing in Washington County, and to keep the project affordable for another 60 years. The proposed rehab includes a full building envelope replacement, reconstruction of exterior stair entry structures, site work for improved drainage, HVAC upgrades and almost full interior replacements.

**Project and Unit Information: ("X" all boxes which apply)**

<input type="checkbox"/>	New Construction	<input checked="" type="checkbox"/>	Multi-Family Rental Housing	<input type="checkbox"/>	Elderly/Disabled
<input checked="" type="checkbox"/>	Acquisition	<input type="checkbox"/>	Single-Family Housing	<input type="checkbox"/>	Independent Living
<input checked="" type="checkbox"/>	Rehabilitation	<input type="checkbox"/>	Homeless Shelter	<input type="checkbox"/>	Modular Units
<input type="checkbox"/>	Vacant	<input type="checkbox"/>	Transitional Housing	<input type="checkbox"/>	Congregate/Assisted Living
<input checked="" type="checkbox"/>	Occupied	<input type="checkbox"/>	Group Home: _____ (# units)	<input type="checkbox"/>	SRO
If rehabilitation, year built: _____		1982			
<input checked="" type="checkbox"/>	Family	<input type="checkbox"/>	Persons with HIV/AIDS	<input type="checkbox"/>	Alcohol/Drug Recovery
<input type="checkbox"/>	Elderly	<input type="checkbox"/>	Psychiatrically Disabled (CMI)	<input type="checkbox"/>	Ex-Offenders
<input type="checkbox"/>	Physically Disabled	<input type="checkbox"/>	Developmentally Disabled	<input type="checkbox"/>	Homeless
<input type="checkbox"/>	Farmworkers	<input type="checkbox"/>	Permanent Supportive Hsg.	Other: _____	
<input type="checkbox"/>	Transitional housing	<input type="checkbox"/>	Victims of Domestic Violence	Other: _____	

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2 4 Number of units accessible to the disabled n/a Number of units that will be visitable (rehab exempt from visitability rule)

3 \_\_\_\_\_ Number of transitional housing units \_\_\_\_\_ Number of beds, i.e., group home or dormitory

4 1 Number of internet connections in community building \_\_\_\_\_ Number of units with high speed internet

**Proposed Sources and Uses**

Uses:	\$ Amount	Sources:	\$ Amount
Acquisition	5,520,000	HOME	
Construction/Rehab	5,118,745	Perm Loan/OAHTCs	4,650,000
Development	3,136,840	Trust Fund	200,000
		Weatherization	235,287
		HELP	
		Tax Credit Equity	7,379,262
		Deferred Developers Fee	663,325
		Other: Seller Loan	444,286
		Other: Cashflow	203,152
		Other:	
		Other:	
<b>Total:</b>	<b>13,775,585</b>	<b>Total:</b>	<b>13,775,585</b>

Use	Total Cost	Cost per Unit	Cost per S.F.
Residential	\$13,775,585	\$199,646	\$258
Commercial	\$	\$	\$
<b>Total Cost</b>	<b>\$13,775,585</b>	<b>\$199,646</b>	<b>\$258</b>

Proposed Improvements	Description	Comments
<b>Exterior:</b>		
Siding	Full replacement	Replace with Hardi cementitious w/ rainscreen
Roof	Full replacement	Replace with architectural shingles; extend overhang.
Windows and Doors	Full replacement	Replace with all new efficient vinyl windows and sliders, and prehung fiberglass entry doors.
Insulation: walls and attic	Full replacement	Replace all wall insulation with blown-in fiberglass; replace attic insulation with blown-in.
Exterior stairs and walkways	Replacement	Full replacement of exterior stair structure; replacement of exterior upper walkway concrete topping.

1	<b>Interior:</b>		
2	Finishes and furnishings	Full Replacement	Full interior paint; full replacement of unit flooring; full cabinets and countertops replacement.
3			
4	Plumbing and fixtures	Replacement	Full replacement of kitchen sinks and faucets, bathroom sinks and faucets, toilets; partial replacement of tubs, showers and water heaters.
5	Ventilation	Whole-house	Continuous, dedicated bath fans in every unit, and fresh air intake vents; replace crawlspace ventilation fans and ductwork.
6	Appliances	Full Replacement	Full replacement of ranges, dishwashers, refrigerators and range hoods.
7			
8	Electrical	Full Replacement	Full replacement of all existing baseboard heaters with cadets; all interior light fixtures with Energy Star; porch lighting fixtures with Energy Star, building mounted exterior lights.
9	<b>General:</b>		
10			
11	Site Work	Improvements	Selective parking lot repairs; significant storm water improvements; retaining wall drainage and waterproofing; re-grading for improved drainage; replacement of damaged retaining walls; tree and shrub removal; improved landscape and irrigation.
12			
13	Concrete	Improvements	Replace curbs and unit patios where damaged; replace deck footings where needed; replace masonry retaining walls; flatwork repairs for damaged sidewalks and site ADA.

Yes (x)    No (x)    N/A (x)

15 For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or exceeds OHCS's 30-year sustainability requirement.

      

16 **Relocation Plan (if applicable):**

17 Farmington Meadows is comprised of seven buildings, with 9-13 units each. The construction schedule allots 21 days for the interior rehabilitation of each unit. Residents will receive written notification 90 days prior to the beginning of construction. Contractor, Management and Ownership will hold a meeting before construction starts, in order to answer questions and address any concerns from the residents. The meeting will also provide a basic walk through of the construction and relocation process. Since many residents at Farmington Meadows speak Korean as their primary language, Guardian will provide translation services for the relocation meeting and follow-up consultations with residents who need language assistance.

21 **Relocation Plan** (please see included relocation spreadsheet in Part 9- Financial Feasibility)

22 **Lodging** – During construction residents will be housed in the Homestead Suites Extended Stay Facilities, located in Beaverton, less than two miles away from Farmington Meadows Apartments. The accommodations include the following amenities: weekly cleaning service, cable television, pet friendly

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rooms, kitchenettes equipped with; mini refrigerator, microwave oven, stovetop, toaster, coffee maker, cooking utensils, dishes and cutlery.  
The daily rate of \$68.29 and \$79.67 includes a 10.5% hospitality tax and a 3% increase of the total cost to account for the rate of inflation.

*Total Lodging Cost: 69 units for 21 nights each:\$103,014*

**Storage** - The relocation plan calls for PODS to be delivered to the site for the resident's belongings, and then stored off-site during construction since the parking lot does not lend itself to convenient installment of the PODS. The PODS rentals are \$190/month to be stored offsite, and the pick-up/drop-off fees total \$160/unit; in total the PODS will cost \$435 per unit.

*Total Storage Cost: 69 units 112 days: \$30,040*

**Movers/Packers** – Resident's units will be packed and moved by the local moving professionals. The moving estimate was based on the square footages of each unit type (1bdm - \$650 / 2bdm - \$850 / 3-bdrm - \$1050). The moving per unit cost includes: packing materials, man hours and the moving truck, and comes to \$876/unit in total. A packing allowance of \$200/unit is provided in case residents need assistance packing up their belongings for the move.

*Total Moving/Packing Cost: 69 units: \$74,250*

**Food Allowance** – As the lodging facilities are equipped with a kitchen, providing a food allowance is not mandatory, however Owner and Management acknowledge the inconvenience that the relocation may cause the residents and would like to provide a food allowance of \$50.00 a week for adults and \$25.00 a week for children.

*Total Food Allowance: \$17,624*

**Incidentals** – Handicapped assistance, dumpster rental, unknown incidentals: \$5,000.

**Translating** – Allowance for translation services, 75 hours X \$20/hr. \$1,500.

**Experience** - *Between 2010 and 2011, LMC and Guardian Management successfully coordinated the following relocation projects which came in under budget and on time:*

*Stewart Terrace – 42 units – relocation length per unit 6 to 13 days*

*Indian Creek Court – 48 units – relocation length per unit 5 to 13 days*

*Uptown Tower Apartments (Uniform Relocation Act Guidelines applicable) – 72 units – relocation length per unit 4 to 5 days*

*The Village – 23 units – relocation length per unit 3 to 5 days*

**Proposed Rents:**

Unit Size(s)	# of Units	% Area Median Income	Proposed Rent
1-Bedroom	8	53	\$660
2-Bedroom	44	51	\$760
3-Bedroom	16	53	\$910
3 -Bedroom (Mgrs.)	1	N/A	\$N/A

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**Proposed Annual Operating Budget:**

2	Gross Potential Income	\$646,643
3	Vacancy: 5%	(32,332)
	Effective Gross Income	\$614,311
4	Operating Expenses	(323,704)
5	Net Operating Income	\$290,607
	Debt Service/Loan Amt.	
6	Rate: 3.25%	
7	Term: 30 years	
	Annual Payment:	\$242,845
8		\$242,845 (primary debt)
9	Total Debt Service	\$345,345 (total debt service, including deferred developer fee and cash flow loans)
10	Annual Cash Flow	\$47,372 (after primary debt, available to service deferred developer fee and cash flow loans)
11	DCR	1.20 primary - 0.82 total

12 Market Demographics: (Provide bullet points under each area)

13	Economy:	- The Portland CBSA saw moderate growth in all major economic and demographic indicators from 2004 through 2007. However, beginning in 2008 the economic and demographic indicators began to decline due to the national and local recession. Although the State of Oregon Employment Department (OED) has stated that the recession is over, the region is currently experiencing only modest improvements in employed levels and unemployment rates. Year-to-date statistics provide evidence of an improving economy, albeit with an unemployment rate well above the previous recession induced levels of 2002 and 2003.
17	Job Growth:	- Currently, the seasonally adjusted unemployment rate for 2011 remains high for the region at 9.1%; however, monthly unemployment levels in 2011 were lower than each of their corresponding months in 2009 and 2010. The following provides a historical context to fully understand the magnitude of the recent employment decline and its implications for residential construction.
20	Supply:	There are a few affordable rent projects in the initial planning stages in the subject's CMA (competitive market area); however, they have not been approved yet and still need to secure funding. Additionally, there are luxury apartment and mixed-use market rent apartment projects either in the planning stages or under construction in the CMA, but these are not expected to compete with the subject due to their superior quality/condition and higher rent levels. Therefore, the subject should continue to experience low vacancy and maintain a lengthy waiting

<p>2</p> <p>3</p> <p>4</p> <p>5</p>	<p>list for units.</p> <ul style="list-style-type: none"> <li>- There are limited housing options for people in need of similar affordable housing as evidenced by the survey conducted for this report. All of the market participants surveyed for this report felt there is a shortage of affordable housing for the subject's target market. A large provider of affordable housing in the area is the Washington County Department of Housing Services, who recorded extreme demand for housing in the area with a wait list of over 6,000 families (four to six years).</li> </ul>
<p>6 Demand:</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p> <p>11</p>	<ul style="list-style-type: none"> <li>- The subject's apartment market is currently operating below average market vacancy rates (below 5%) for both "market" and "restricted" rent apartment projects similar to the subject. These low vacancy levels indicate a supply shortage of both "market" and "restricted" rent projects similar to the subject.</li> <li>- The subject has been well received in the market and project appeal and accessibility is expected to improve further upon the completion of the renovations; therefore, continued demand for the subject's units is expected.</li> <li>- Numerous affordable housing projects surveyed for this report had a waiting list. The waiting lists generally ranged from 1 to 3 years for similar low-income housing. The subject currently has a waiting list ranging from 1 to 2.5 years depending on the unit type.</li> </ul>

<p>12 Sponsor Experience:</p> <p>13</p> <p>14</p> <p>15</p> <p>16</p> <p>17</p> <p>18</p> <p>19</p> <p>20</p>	<ul style="list-style-type: none"> <li>- Founded in 1971 with headquarters in Portland, Guardian is a leading real estate management, investment and affordable housing development firm. Guardian's diverse real estate experience offers funders, partners and investors a valuable combination of market expertise, in-house development capacity, and a proven track record of project delivery and success.</li> <li>- Currently, Guardian's management portfolio consists of more than 140 properties (12,000 multifamily units); of these over 70 are affordable, rent-restricted properties through HUD, USDA Rural Development, LIHTCs, other public financing, or a combination thereof.</li> <li>- The company owns over half of its management portfolio, including 30 affordable housing properties, demonstrating a commitment to affordable housing preservation, and a capacity for long-term ownership and asset management.</li> <li>- Since 2005, Guardian has successfully acquired and preserved almost 2,000 "Preservation Units" (which include some form of federal rent assistance) for our own portfolio and as a consultant to other non-profit partners.</li> </ul>
<p>21 Proposed Resident Services:</p> <p>22</p> <p>23</p>	<ul style="list-style-type: none"> <li>- See Part 6-Resident Services for details.</li> <li>- Farmington Meadows Apartments is a fairly large property of 69 units, with a low-income population mix of about two-thirds seniors (ages 60-92) and one-third young families (most with children under age eight). Resources for residents at Farmington have historically been more challenging to obtain, since for most of the seniors living here English is a second</li> </ul>

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	<p>language, with Korean being their primary language spoken at home. Having a community of ESL seniors mixed with young families with children creates an opportunity to bridge the language barrier gap (English-Korean), and would enable us to provide the additional services needed to accommodate all occupants of the apartment community.</p> <ul style="list-style-type: none"><li>- Guardian's on-site Community Manager knows the residents well at Farmington, and has spoken in length with many of them regarding their needs for services and support activities. Services and/or resources that will be offered to our senior residents will include: English language assistance, transportation assistance, meals-on-wheels, and various forms of social entertainment. Resources geared toward young families with children will include: educational awareness about nutrition, exercise and recreation for children and families, general education, and a variety of activities offered within the surrounding area including utility and emergency assistance, child care assistance, food assistance, and job training. All residents can benefit from additional services available such as transportation provided by Ride Connection, educational seminars offered by the Portland Housing Center (e.g. for financial planning assistance), and Homework Helpers (assistance offered by the local city library).</li></ul>
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<b>OHCS Funds Reserved:</b>	HDGP \$200,000; LIHTC \$820,000; OAHTC \$4,650,000; Weatherization \$235,287
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<b>Recommended Motion:</b>	To approve a an HDGP grant in an amount up to \$200,000 and a Weatherization grant in an amount up to \$235,287 to Guardian Development, LLC for the acquisition and rehabilitation of Farmington Meadows Apartments located in the City of Aloha, Washington County, Oregon. Award is contingent on meeting all program requirements and conditions of this award.
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**2012 CFC HOUSING COUNCIL REPORT**

Project Name:	Harkson Court	No. of Units:	20
Project Address:	2900 22 <sup>nd</sup> Avenue	County:	Washington
Project City/St/Zip:	Forest Grove, OR 97116	US House Dist.:	01
Sponsor Name:	Accessible Living, Inc.	State Senate Dist.:	15
Consultant:	Dave Bachman	State House Dist.:	29
Architect:	N/A	Years of Affordability(60 yr. Min):	60
Contractor:	Portland RE Solutions	Target Population:	Low-income Seniors
Property Mgmt.:	Cascade Management		& people with disabilities

**Project Description (brief narrative):**  
 Harkson Court is a 20 unit affordable housing project designed to meet the specific needs of people with physical disabilities who desire to live independently. Harkson Court has 2 one bedroom, 14 two bedroom and 4 three bedroom apartments designed to accommodate live-in caregivers, if needed. The project was funded with 1992 Series D Elderly and Disabled Private Activity Bonds and Washington County Home funds. The project is currently in need of renovation including new siding, roof and windows.

**Project and Unit Information: ("X" all boxes which apply)**

- |                                                    |                                                                 |                                                        |
|----------------------------------------------------|-----------------------------------------------------------------|--------------------------------------------------------|
| <input type="checkbox"/> New Construction          | <input checked="" type="checkbox"/> Multi-Family Rental Housing | <input checked="" type="checkbox"/> Elderly/Disabled   |
| <input type="checkbox"/> Acquisition               | <input type="checkbox"/> Single-Family Housing                  | <input checked="" type="checkbox"/> Independent Living |
| <input checked="" type="checkbox"/> Rehabilitation | <input type="checkbox"/> Homeless Shelter                       | <input type="checkbox"/> Modular Units                 |
| <input type="checkbox"/> Vacant                    | <input type="checkbox"/> Transitional Housing                   | <input type="checkbox"/> Congregate/Assisted Living    |
| <input checked="" type="checkbox"/> Occupied       | <input type="checkbox"/> Group Home: _____ (# units)            | <input type="checkbox"/> SRO                           |

If rehabilitation, year built: 1994

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|---------------------------------------------------------|---------------------------------------------------------|------------------------------------------------|
| <input type="checkbox"/> Family                         | <input type="checkbox"/> Persons with HIV/AIDS          | <input type="checkbox"/> Alcohol/Drug Recovery |
| <input checked="" type="checkbox"/> Elderly             | <input type="checkbox"/> Psychiatrically Disabled (CMI) | <input type="checkbox"/> Ex-Offenders          |
| <input checked="" type="checkbox"/> Physically Disabled | <input type="checkbox"/> Developmentally Disabled       | <input type="checkbox"/> Homeless              |
| <input type="checkbox"/> Farmworkers                    | <input type="checkbox"/> Permanent Supportive Hsg.      | Other: _____                                   |
| <input type="checkbox"/> Transitional housing           | <input type="checkbox"/> Victims of Domestic Violence   | Other: _____                                   |

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20 Number of units accessible to the disabled

Number of units that will be visitable

Number of transitional housing units

Number of beds, i.e., group home or dormitory

3 Number of internet connections in community building

Number of units with high speed internet

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5 Proposed Sources and Uses			
6 Uses:	\$ Amount	Sources:	\$ Amount
7 Acquisition		WA Co. HOME (Deferred Pmt.)	\$ 400,000
8 Construction/Rehab	\$ 272,299	Perm Loan/OAHTCs	
9 Development	\$ 44,960	Trust Fund	\$ 400,000
10 HOME (Deferred Payment)	\$ 400,000	Weatherization	
11 Contingency, Fees	\$ 41,225	HELP	
12 Deposit to Reserves	\$ 80,790	Tax Credit Equity	
		Deferred Developers Fee	
		Other: Project Cash	\$ 39,274
14 Total:		Total:	

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16 Use	Total Cost	Cost per Unit	Cost per S.F.
17 Residential	\$ 839,274	\$ 41,963.70	\$ 42.28
Commercial	\$	\$	\$
18 Total Cost	\$ 839,274	\$ 41,963.70	\$ 42.28

19 Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):

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21 Proposed Improvements	Description	Comments
22 Exterior:	Siding	Replace LP siding deteriorated

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2		Roofing	Complete tear off and replace all five buildings roofing, flashing and tar paper
3		Gutters	Replace all
4		Down spouts	Replace all
5		Windows	Replace all
6		painting	Paint new siding and trim
7	<b>Interior:</b>	Water heaters	Replace and bring up to code
8		Electric ranges	Replace and with energy appliances
9		Refrigerators	Replace and with energy appliances
10		Dish washers	Replace and with energy appliances
11		Vinyl	Replace all bathroom vinyl
12		toilets	Replace with low-flow toilets
	<b>General:</b>	New outdoor lighting	Improved security and resident safety

Yes (x)    No (x)    N/A (x)

13 For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or  
 14 exceeds OHCS's 30-year sustainability requirement.           

15 Relocation Plan (if applicable):  
 16 N/A

**Proposed Rents:**

17	Unit Size(s)	# of Units	% Area Median Income	Proposed Rent
18	1-Bedroom	2	50	\$ 600.00
19	2-Bedroom	14	50	\$ 673.00-700.00
20	3-Bedroom	3	50	\$ 800.00
	3 -Bedroom (Mgrs.)	1	0	\$ 575.00

**Proposed Annual Operating Budget:**

21	Gross Potential Income	\$ 169,658
22	Vacancy: 5%	(\$8,483)
23	Effective Gross Income	\$ 161,175
	Operating Expenses	(\$100,266)

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Net Operating Income	\$ 60,909
Debt Service/Loan Amt.	\$ 388,000
Rate: 5.22%	
Term: 13 years (remaining)	
Annual Payment:	\$ 40,989
Total Debt Service (Incl. HOME Loan Wa. County)	\$ 52,989
Annual Cash Flow	\$ 7,920
DCR (Total)	1.15

Market Demographics: (Provide bullet points under each area)

Economy:	Stabilized and improving, job growth and construction permits have accelerated from 2009 to 2011. Continued and steady improvement is expected.
Job Growth:	Washington County reports 3.5% job growth in 2011.
Supply:	Harkson Court is the only Senior/Special Needs project in Forest Grove.
Demand:	Demand for senior and special needs housing exceeds the supply in Washington County and especially in Forest Grove.

Sponsor Experience:	Significant Housing Experience on Sponsor's Board and by Karen Voiss, Executive Director.
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Proposed Resident Services:	Accessible Living, Inc. provides aging in place and supportive services to residents at Harkson Court.
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OHCS Funds Reserved:	\$400,000 HDGP
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Recommended Motion:	To approve an HDGP grant in an amount up to \$400,000 to Accessible Living, Inc. for the rehabilitation of Harkson Court located in Forest Grove, Oregon. Award is contingent on meeting all program requirements and conditions of award.
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### 2012 CFC HOUSING COUNCIL REPORT

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Project Name:	Juniper Gardens Phase II Apartments	No. of Units:	22
Project Address:	2718 Juniper Street	County:	Washington
Project City/St/Zip:	Forest Grove OR 97116	US House Dist.:	1
Sponsor Name:	Bienestar, Inc	State Senate Dist.:	15
Consultant:	CASA of Oregon	State House Dist.:	29
Architect:	Scott Edwards Architecture	Years of Affordability(60 yr. Min):	60
Contractor:	LMC Construction	Target Population:	Farmworker Family
Property Mgmt.:	Cascade Management		

Project Description (brief narrative):

Juniper Gardens Phase II will be 22 units of new construction housing for farmworkers and their families. Forest Grove is surrounded by large farms and nurseries, making housing for year round farmworkers necessary. The project has all of its other funding sources reserved or obligated (\$3,000,000 from USDA RD, \$250,000 through Washington County HOME, and \$1,735,286 in FWHTC's), and the Rental Assistance Subsidy from USDA RD has been obligated for 100% of the tenant units in this project. Juniper Gardens Phase II has been designed with sustainability and the specific resident population in mind. It is preceded by Phase I (24 units of farmworker housing), which received OHCS resources and is currently under construction. The market study, completed in July 2011, indicates a demand for 173 farmworker units in Washington County by 2013, and this project will help alleviate that need. Bienestar, with 30 years experience in owning and operating farmworker housing, will provide a comprehensive array of resident service programs for children, teens, and adults. The site was purchased by Bienestar in 2010, and will feature a community building with laundry, meeting space, and a computer lab, as well as play areas, landscaped courtyards, and a community garden.

Project and Unit Information: ("X" all boxes which apply)

<input checked="" type="checkbox"/>	New Construction	<input checked="" type="checkbox"/>	Multi-Family Rental Housing	<input type="checkbox"/>	Elderly/Disabled
<input type="checkbox"/>	Acquisition	<input type="checkbox"/>	Single-Family Housing	<input type="checkbox"/>	Independent Living
<input type="checkbox"/>	Rehabilitation	<input type="checkbox"/>	Homeless Shelter	<input type="checkbox"/>	Modular Units
<input type="checkbox"/>	Vacant	<input type="checkbox"/>	Transitional Housing	<input type="checkbox"/>	Congregate/Assisted Living
<input type="checkbox"/>	Occupied	<input type="checkbox"/>	Group Home: _____ (# units)	<input type="checkbox"/>	SRO
<input type="checkbox"/>	rehabilitation, year built: _____				
<input checked="" type="checkbox"/>	Family	<input type="checkbox"/>	Persons with HIV/AIDS	<input type="checkbox"/>	Alcohol/Drug Recovery
<input type="checkbox"/>	Elderly	<input type="checkbox"/>	Psychiatrically Disabled (CMI)	<input type="checkbox"/>	Ex-Offenders
<input type="checkbox"/>	Physically Disabled	<input type="checkbox"/>	Developmentally Disabled	<input type="checkbox"/>	Homeless
<input checked="" type="checkbox"/>	Farmworkers	<input type="checkbox"/>	Permanent Supportive Hsg.	Other: _____	
<input type="checkbox"/>	Transitional housing	<input type="checkbox"/>	Victims of Domestic Violence	Other: _____	

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3 2 Number of units accessible to the disabled 16 Number of units that will be visitable  
4          Number of transitional housing units          Number of beds, i.e., group home or dormitory  
5          Number of internet connections in community building 22 Number of units with high speed internet

5 **Proposed Sources and Uses**

Uses:	\$ Amount	Sources:	\$ Amount
Acquisition	\$ 0	HOME	
Construction/Rehab	\$ 4,044,863	Perm Loan/OAHTCs	
Development	\$ 1,540,423	HDGP/Trust Fund	\$ 500,000
		Weatherization	
		HELP	
		Tax Credit Equity	
		Deferred Developers Fee	
		ORR Loan	\$ 100,000
		USDA RD 514/516	\$ 3,000,000
		Washington Co. HOME	\$ 250,000
		FWHTC Equity	\$ 1,735,286
<b>Total:</b>	<b>\$5,585,286</b>	<b>Total:</b>	<b>\$5,585,286</b>

Use	Total Cost	Cost per Unit	Cost per S.F.
Residential	\$ 5,585,286	\$ 253,877	\$ 211.20
Commercial	\$	\$	\$
<b>Total Cost</b>	<b>\$ 5,585,286</b>	<b>\$ 253,877</b>	<b>\$ 211.20</b>

18 **Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):**

Proposed Improvements	Description	Comments
<b>Exterior:</b>		
Multi-Family Residential	4 Wood Frame Bldgs.	22 units in 2 garden style townhome buildings and 2 stacked flat buildings. Building orientation for natural day lighting and cross ventilation
Community Building	Addition to Phase I Laundry Room	Add 2195 sq. ft. of community meeting and resident services space, communal kitchen and bathroom, computer lab



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<b>TOTAL:</b>	22 units		

3 **Proposed Annual Operating Budget:**

Gross Potential Income	\$ 208,880
Vacancy: 5%	( 10,444 )
Effective Gross Income	\$ 198,436
Operating Expenses	(115,759)
Net Operating Income	\$ 82,677
Total Loan Amt. (\$1,500,000 + \$250,000 + \$100,000)	\$ 1,850,000
Rate:	1%
Term:	33 years/30 years/10 years
Annual Total Debt Payment:	\$ 73,547
Total Debt Service	\$ 73,547
Annual Cash Flow	\$ 9,130
Primary Loan DCR / Total Debt DCR	1.55 / 1.12

12 **Market Demographics: (Provide bullet points under each area)**

Economy:	<ul style="list-style-type: none"> <li>• Agricultural Area</li> <li>• Many large farms and nurseries in close proximity, as well as vineyards, ranches and other types of businesses that employ farmworkers</li> <li>• Forest Grove is in central proximity to employers and services, including those specific to farmworkers</li> </ul>
Job Growth:	<ul style="list-style-type: none"> <li>• Steady</li> <li>• Washington County and elsewhere in the state has a strong potential for rebound as the national economy improves</li> <li>• Year round work in nursery stock, Christmas trees, and vineyards consistently demonstrate strong growth in Washington County</li> </ul>
Supply:	<ul style="list-style-type: none"> <li>• Farmworkers are among the lowest income earners in Oregon, and existing rental housing costs are often not affordable</li> <li>• Existing stock of rental housing in Forest Grove is aging and lacks subsidies</li> <li>• Language and cultural barriers deter farmworker families from seeking or receiving traditional rental housing</li> </ul>
Sponsor Experience:	<ul style="list-style-type: none"> <li>• Bienestar's Executive Director has 24 years experience</li> <li>• Bienestar has been working with affordable housing for 30 years</li> <li>• Sponsor has received numerous awards and recognitions for their outstanding and culturally appropriate resident services</li> <li>• Sponsor has hired experienced Farmworker Housing Development</li> </ul>

1		Consultant
2	Proposed Resident Services:	Youth IDA Program GED Preparation Computer Classes Financial Literacy Course IDA Program Emergency Cash Assistance Job Club Nutrition Classes Summer Lunch and Fun Kids Computer Club Sustainable Microfarming Community Gardens Homework Club EITC Explorador Camp Science Club Financial Fitness for Life ESL Classes Citizenship Classes Family Support Group Born to Learn Education Navigation
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15	OHCS Funds Reserved:	HDGP \$500,000; ORR \$100,000
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16	Recommended Motion:	To approve an HDGP grant in an amount up to \$500,000 and an Oregon Rural Rehabilitation loan up to loan commitment amount of \$100,000 to Bienestar for the new construction of Juniper Gardens Apartments Phase II in Forest Grove, Oregon. Award is contingent on meeting all program requirements and conditions of award.
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### 2012 CFC HOUSING COUNCIL REPORT

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Project Name:	Deskins Commons	No. of Units:	56
Project Address:	1103 N. Meridian Street	County:	Yamhill
Project City/St/Zip:	Newberg, OR 97132	US House Dist.:	1
Sponsor Name:	Housing Authority of Yamhill County	State Senate Dist.:	13
Consultant:	Housing Development Center	State House Dist.:	25
Architect:	IDEA Architecture	Years of Affordability(60 yr. Min):	60
Contractor:	Bremik Construction	Target Population:	Workforce and Chronically Mentally Ill
Property Mgmt.:	Housing Authority of Yamhill County		

9 Project Description (brief narrative):

10 This proposal seeks financing for the development of Deskins Commons, a 56-unit affordable workforce housing project that will set aside eight units of housing for persons with chronic mental illness (CMI). The project will be located on a large, very unique site within one-half mile of downtown Newberg, and will be built around an existing historic home and native white oak trees. The Todd House, listed on the City of Newberg's local historic register, will be renovated for adaptive reuse as a gathering place for residents, living space for the resident manager, and offices for property management and resident services.

13 The shortage of affordable rental units in the Newberg area was substantiated by a March 2012 market analysis by Colliers International. According to this report, there is an unmet demand for 300 affordable housing units in the local area, expected to increase to 380 units by 2015. The Colliers report found that Deskins Commons is the only new multifamily development, whether "market" or "affordable," currently proposed in Newberg. The Housing Authority of Yamhill County (HAYC), the project sponsor, is well aware of this demand. HAYC currently maintains a closed waiting list with more than 1,500 people seeking Section 8 housing vouchers and has extensive waiting lists at several of its other affordable developments in the area.

17 Deskins Commons will provide much-needed housing for this population, including 11 one-bedroom, 37 two-bedroom and 8 three-bedroom apartments. With the exception of the resident manager's unit, rents for all units will be restricted to 50% of median family income (MFI). Forty units will allow residency to households earning up to 60% MFI, while the rest will be restricted to those earning 50% MFI or less. The lower rent restriction paired with a higher income restriction will ensure strong demand from, and housing affordability to, a broad segment of the local workforce. Deeper affordability will be provided to households earning less than 50% of median income through Project Based Section 8 subsidies that will be attached to 12 units. These subsidies will make living at Deskins Commons affordable to CMI residents referred by Yamhill County Mental Health, most of whom earn less than 30% of median income.

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Project and Unit Information: ("X" all boxes which apply)

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<input checked="" type="checkbox"/>	New Construction	<input checked="" type="checkbox"/>	Multi-Family Rental Housing	<input type="checkbox"/>	Elderly/Disabled
<input checked="" type="checkbox"/>	Acquisition	<input type="checkbox"/>	Single-Family Housing	<input type="checkbox"/>	Independent Living
<input checked="" type="checkbox"/>	Rehabilitation	<input type="checkbox"/>	Homeless Shelter	<input type="checkbox"/>	Modular Units
<input checked="" type="checkbox"/>	Vacant	<input type="checkbox"/>	Transitional Housing	<input type="checkbox"/>	Congregate/Assisted Living
<input type="checkbox"/>	Occupied	<input type="checkbox"/>	Group Home: _____ (# units)	<input type="checkbox"/>	SRO

If rehabilitation, year built: ca. 1900

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<input checked="" type="checkbox"/>	Family	<input type="checkbox"/>	Persons with HIV/AIDS	<input type="checkbox"/>	Alcohol/Drug Recovery
<input type="checkbox"/>	Elderly	<input checked="" type="checkbox"/>	Psychiatrically Disabled (CMI)	<input type="checkbox"/>	Ex-Offenders
<input type="checkbox"/>	Physically Disabled	<input type="checkbox"/>	Developmentally Disabled	<input type="checkbox"/>	Homeless
<input type="checkbox"/>	Farmworkers	<input type="checkbox"/>	Permanent Supportive Hsg.	Other:	_____
<input type="checkbox"/>	Transitional housing	<input type="checkbox"/>	Victims of Domestic Violence	Other:	_____

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<input type="checkbox"/>	3	Number of units accessible to the disabled	<input type="checkbox"/>	50	Number of units that will be visitable
<input type="checkbox"/>		Number of transitional housing units	<input type="checkbox"/>		Number of beds, i.e., group home or dormitory
<input type="checkbox"/>	5	Number of internet connections in community building	<input type="checkbox"/>	56	Number of units with high speed internet

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Proposed Sources and Uses

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Uses:	\$ Amount	Sources:	\$ Amount
Acquisition	\$ 902,650	HOME	\$ 500,000
Construction/Rehab	\$ 9,912,027	Perm Loan/OAHTCs	\$ 2,351,975
Development	\$ 3,468,754	Trust Fund	\$ 200,000
		Weatherization	\$ 75,000
		Tax Credit Equity	\$ 7,872,000
		Deferred Developers Fee	\$ 250,000
		Other: Owner Equity	\$ 2,960,287
		Other: School Excise Tax Fee Waiver	\$ 55,100
		Other: Property tax exemption	\$ 19,069
<b>Total:</b>	<b>\$ 14,283,431</b>	<b>Total:</b>	<b>\$ 14,283,431</b>

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Use	Total Cost	Cost per Unit	Cost per S.F.
Residential	\$ 14,283,431	\$ 255,061	\$ 259.69
Commercial	\$	\$	\$
Total Cost	\$ 14,283,431	\$ 255,061	\$ 259.69

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5 Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):

NEW CONSTRUCTION		
Proposed Improvements	Description	Comments
<b>Exterior:</b>		
Roofing	TPO roofing over rigid insulation, composite singles & green roof	TPO at Building #2. All other buildings composite shingle. Green roofs over TPO at portions of Buildings 2,5 & 8.
Foundations	Reinforced concrete footings, stem walls and slab on grade.	
Wood Framing	2X6 exterior with 2X4 interior walls. Manufactured roof trusses with engineered wood truss joists at floors. Plywood sheathing panels at exterior walls, roofs, subfloors and shear walls.	
Exterior Cladding	Hardiboard Siding	
Windows – Community Areas and Typical	Vinyl sliders and casement windows	Community Areas will feature storefront windows.
<b>Interior:</b>		
Residential units	11 – 1BR/1BA 36 – 2BR/1BA 8 – 3BR/2BA	All units have range, dishwasher, refrigerator/freezer and washer/dryer hookups. Carpet in BRs only. Vinyl flooring in kitchens, living, and baths
Elevators	Building #2 is three story, 34 units with elevator, remaining buildings are one and two story walk-ups with 2, 3 and 4 units each	
Community Space	2,100 SF	A community area with full kitchen, a common laundry room and a children’s play room is included in Building #2.
<b>General:</b>		
Site Improvements	Walkways, preserved green spaces, play structure	Buildings will be carefully sited among an historic structure and existing white oak trees to preserve views and green space, and to provide space for families to exercise and recreate.

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2 HISTORIC REHABILITATION		
3 Proposed Improvements	4 Description	5 Comments
6 <b>Exterior:</b>		
7 North Building Addition	Demolish and restore original porch	The addition was not part of the original structure.
8 Windows	Refurbish wood windows	
9 Roofing System	Repair roof structure, Remove and replace shingles	Building structure will be upgraded to resist lateral loads.
10 Exterior Walls	Remove siding, insulation, wood lap siding, felt, trim, sills, windows and doors	Complete replacement of the exterior cladding system employing rain screen technologies. Vinyl will be removed and replaced with materials in keeping with the original appearance.
11 Basement/Crawl Space	Install vents, vapor barriers, Provide minimum code clearance	
12 <b>Interior:</b>		
13 Floors	Repair sub-floors, Install new finishes, Refinish some wood floors	
14 Interior Walls	Remove, replace, or repair finishes	
15 Kitchen (in manager's unit)	New cabinets, countertops & appliances	
16 Bathrooms	Remodel and upgrade with new fixtures	

15 For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or exceeds OHCS's 30-year sustainability requirement.

Yes (x)    No (x)    N/A (x)

      

17 Relocation Plan (if applicable):

18 NOT APPLICABLE

19 **Proposed Rents:**

20 Unit Size(s)	# of Units	% Area Median Income	Proposed Rent
21 1-Bedroom	11	50% rents, 50% & 60% incomes	\$585 - \$598
22 2-Bedroom	36	50% rents, 50% & 60% incomes	\$680 - \$715
23 3-Bedroom	8	50% rents, 50% & 60% incomes	\$785 - \$821
24 2 -Bedroom (Mgrs.)	1	Not restricted	\$680

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2 **Proposed Annual Operating Budget:**

3	Gross Potential Income	\$ 462,440
4	Vacancy: 7%	(\$32,371)
5	Effective Gross Income	\$ 430,069
6	Operating Expenses	(\$241,175)
7	Net Operating Income	\$ 188,894
8	Debt Service/Loan Amt.	\$ 2,351,975
9	Rate:	7.75% without OAHTC, 3.25% with OAHTC, 4.89% Blended
10	Term:	20 years
11	Annual Payment:	\$1 51,115
12	Total Debt Service	\$ 177,396
13	Annual Cash Flow	\$ 11,498
14	DCR	1.06

15 **Market Demographics: (Provide bullet points under each area)**

16	Economy:	<ul style="list-style-type: none"> <li>• Principal economic activities in Yamhill County include agriculture, food processing, education, and wood products manufacturing.</li> <li>• Growth in high tech and other manufacturing industries has helped to offset the declines in the region's traditional resource industries.</li> <li>• Similar to the rest of the state, the county experienced poor economic conditions in 2009-2010 with modest improvements to the market in 2011.</li> <li>• There have been continued market/economic improvements in 2012, especially in the multi-family housing market. There have been some signs of improvement in the major economic and demographic indicators and annual statistics for 2011.</li> <li>• Even though economic growth is restrained in many industries, the region is projected to see increases in population, households, and housing units through 2015.</li> </ul>
17	Job Growth:	<ul style="list-style-type: none"> <li>• Overall long-term job growth projections are positive, recognizing that the employed level was significantly depressed in 2010.</li> <li>• Some industries are not regaining their pre-recession employment. Year-to-date statistics provide evidence of an improving economy, albeit with an unemployment rate still above the previous recession induced levels of 2002 and 2003.</li> </ul>
18	Supply:	<ul style="list-style-type: none"> <li>• There is a shortage of affordable housing units in the Newberg area as indicated by a survey of local management companies and other affordable housing units.</li> <li>• The Housing Authority of Yamhill County (HAYC) is the main provider of affordable housing in the area. It owns and manages 528 affordable housing units in the County.</li> </ul>

<p>1</p> <p>2 Demand:</p> <p>3</p> <p>4</p> <p>5</p>	<ul style="list-style-type: none"> <li>• A market depth analysis indicates market conditions are strong and there is demand for rent restricted units at or below 60% of MFI.</li> <li>• There is current demand for 300 additional units in the CMA for the subject property's income levels. By 2015, demand for additional units will increase to 380 units in the CMA (for the subject property's income levels).</li> <li>• HAYC issues 1,343 Section 8 vouchers and currently has a closed waiting list of over 1,500 people for rent subsidies. It also maintains extensive waiting lists at numerous affordable housing projects.</li> </ul>
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<p>6 Sponsor Experience:</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p> <p>11</p> <p>12</p> <p>13</p> <p>14</p> <p>15</p>	<ul style="list-style-type: none"> <li>• HAYC has been developing and owning affordable housing projects since the early 1980s when it began developing HUD Low Rent Public Housing. In the past 20 years HAYC has developed over 500 units in 16 projects, through new construction and acquisition/rehab. HAYC's projects range in size from a group home to an 88-unit apartment complex.</li> <li>• HAYC has built up its own internal development capability, with one full-time employee assisted by other management staff as needed. The Development Director and all management staff assisting him have at least 10 years of experience.</li> <li>• HAYC has extensive experience developing and owning both workforce and special needs housing, the populations to be served at the proposed project. It owns four workforce housing projects totaling 243 units and 5 projects dedicated to special needs clients.</li> <li>• HAYC has a close working relationship with Yamhill County Health &amp; Human Services (YCHHS). The two organizations have worked together for 20 years to identify housing requirements for special needs populations, get them constructed and ensure their successful operation. The two agencies bring complementary skills, with HAYC focusing on development, construction and property management, and YCHHS providing the primary resident services assistance.</li> </ul>
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<p>16 Proposed Resident Services:</p> <p>17</p> <p>18</p> <p>19</p> <p>20</p> <p>21</p> <p>22</p> <p>23</p>	<ul style="list-style-type: none"> <li>• Deskins Commons will provide workforce housing for families and include at least eight units set aside for people with chronic mental illness. Resident services will cater to the needs of both of these populations.</li> <li>• <b>Special Needs Population:</b> The expected residents of the special needs units will tend to be single, often on SSI, and in need of wraparound supports, to be able to successfully live on their own. Services will be provided through Yamhill County Health and Human Services in the following areas:             <ul style="list-style-type: none"> <li>• Medication management</li> <li>• Skill training on independent living skills</li> <li>• Conflict resolution skills</li> <li>• Symptom management</li> <li>• Supported employment</li> <li>• Emotional supports</li> <li>• Making transportation arrangements</li> </ul> </li> </ul>
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	<ul style="list-style-type: none"><li>• <b>Workforce Population:</b> Resident Services for working families at Deskins Commons will include:<ul style="list-style-type: none"><li>• Child and Youth Development</li><li>• Community Building Services</li><li>• Economic self- sufficiency</li><li>• Health/Access to Health Insurance</li><li>• Property safety/Successful Tenancies</li><li>• Job training skills/Secondary education</li><li>• Transportation services</li></ul></li> <li>• <b>Workforce Housing Service Agreements:</b> HAYC has obtained Memorandum of Understandings for specific services described above, signed by 13 separate social service providers in the area, including:<ul style="list-style-type: none"><li>• Chehalem Youth &amp; Family</li><li>• Department of Human Services (DHS) Self Sufficiency Programs</li><li>• Housing Authority of Yamhill County</li><li>• Lutheran Community Services</li><li>• Virginia Garcia Memorial Health Center</li><li>• Yamhill Community Action Partnership (YCAP)</li><li>• Yamhill County Abacus Program</li><li>• Yamhill County Chemical Dependency Program</li><li>• Yamhill County Commission on Children &amp; Families</li><li>• Yamhill County Family and Youth Program</li><li>• Yamhill County Mental Health Program</li><li>• Yamhill County Public Health Program</li><li>• Yamhill County Transit Area</li></ul></li></ul>
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OHCS Funds Reserved:	LIHTC \$820,000; HOME \$500,000; Trust Fund \$200,000; Low-Income Weatherization \$75,000; OAHTC \$1,397,613
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Recommended Motion:	To approve a HOME grant in an amount up to \$500,000 to the Housing Authority of Yamhill County for both the new construction and partial rehabilitation of Deskins Commons located in Newberg, OR. Award is contingent on meeting all program requirements and conditions of award.
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## 2012 CFC HOUSING COUNCIL REPORT

Project Name:	Hyak	No. of Units:	9
Project Address:	1861 S Edgewood	County:	Clatsop
Project City/St/Zip:	Seaside, OR 97103	US House Dist.:	001
Sponsor Name:	Clatsop County Housing Authority	State Senate Dist.:	032
Consultant:	Kirk Fausett	State House Dist.:	016
Architect:	none	Years of Affordability(60 yr. Min):	60
Contractor:	None	Target Population:	Homeless
Property Mgmt.:	Clatsop County HA		

**Project Description (brief narrative):**

This project is designed to house the homeless in Clatsop County. Residents will begin their stay in the upper dormitory style living for 90-120 days. They will then transition to independent living in the lower level one bedroom units. Clatsop County Housing Authority will own and provide over sight to the program. Helping Hands, an experienced and well respected re-entry service provider, will administer the program on a day-to-day basis.

**Project and Unit Information: ("X" all boxes which apply)**

<input type="checkbox"/> New Construction	<input type="checkbox"/> Multi-Family Rental Housing	<input type="checkbox"/> Elderly/Disabled
<input checked="" type="checkbox"/> Acquisition	<input type="checkbox"/> Single-Family Housing	<input type="checkbox"/> Independent Living
<input checked="" type="checkbox"/> Rehabilitation	<input checked="" type="checkbox"/> Homeless Shelter	<input type="checkbox"/> Modular Units
<input checked="" type="checkbox"/> Vacant	<input checked="" type="checkbox"/> Transitional Housing	<input type="checkbox"/> Congregate/Assisted Living
<input type="checkbox"/> Occupied	<input type="checkbox"/> Group Home: _____ (# units)	<input type="checkbox"/> SRO
If rehabilitation, year built: <u>1945</u>		
<input type="checkbox"/> Family	<input type="checkbox"/> Persons with HIV/AIDS	<input checked="" type="checkbox"/> Alcohol/Drug Recovery
<input type="checkbox"/> Elderly	<input type="checkbox"/> Psychiatrically Disabled (CMI)	<input checked="" type="checkbox"/> Ex-Offenders
<input checked="" type="checkbox"/> Physically Disabled	<input type="checkbox"/> Developmentally Disabled	<input checked="" type="checkbox"/> Homeless
<input type="checkbox"/> Farm workers	<input type="checkbox"/> Permanent Supportive Hsg.	Other: <u>Veterans</u>
<input checked="" type="checkbox"/> Transitional housing	<input checked="" type="checkbox"/> Victims of Domestic Violence	Other: _____

1 Number of units accessible to the disabled      1 Number of units that will be visitable

4 Number of transitional housing units              5 Number of beds, i.e., group home or dormitory

1 \_\_\_\_\_  
 2 0 Number of internet connections in  
 community building

9 Number of units with high speed internet

3 **Proposed Sources and Uses**

4 Uses:	\$ Amount	Sources:	\$ Amount
Acquisition	\$ 295,950	HOME	0
5 Construction/Rehab	\$ 330,387	Perm Loan/OAHTCs	0
6 Development	\$ 7,000	Trust Fund	\$ 500,000
		Weatherization	
		HELP	
		Tax Credit Equity	0
		Deferred Developers Fee	
		Other: TLC loan	\$ 100,000
		Other: CCHA cash	\$ 4,970
		Other: property tax exemption	\$ 4,083
		Other: labor donation	\$ 20,000
12 Total:		Total:	\$ 604,970

13 Use	Total Cost	Cost per Unit	Cost per S.F.
14 Residential	\$ 633,337	\$ 70,371	\$ 154
Commercial	\$ 0	\$ 0	\$ 0
15 Total Cost	\$ 633,337	\$70,371	\$ 154

16 **Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):**

17 Proposed Improvements	Description	Comments
18 <b>Exterior:</b>		
19 Roof	No useful life	Will replace
20 Gutter/drains	No useful life	Will replace and install water garden for gutter drainage
windows	Single pane;	Install energy efficient vinyl clad
21 Vapor barrier	None	Will install
22 <b>Interior:</b>		
23 Plumbing	Galvanized pipe/old fixtures Gas hot water heater	Will install hot water heaters in all units; install all new plumbing, fixtures;

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2 Heating	Baseboard heaters; 1970's shared forced air gas furnace	Install new cadets in all units; remove gas furnace
3 Floor coverings	Original wood/vinyl	Install carpeting; vinyl throughout.
4 Kitchen /bath fixtures	Some new/some in poor repair	Install new where needed; install new showers; low flow WC;
5 Insulation	none	Install Attic insulation/vapor barrier
6 Electrical	Post/wire electrical; old fixtures	Install new service panel wiring to code; install new light fixtures inside and outside
Countertops	Poor repair	Replace all
7 Painting	Poor condition	Repaint with low VOC paint
8 Appliances	vintage 1970's	Replace all with energy star
9 <b>General:</b>		
ADA unit	None	Rehab one unit to meet ADA including outside ramp to unit.

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Yes (x)    No (x)    N/A (x)

11 For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or exceeds OHCS's 30-year sustainability requirement.

      

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13 Relocation Plan (if applicable):
The building is currently not occupied. NA

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**Proposed Rents:**

15 Unit Size(s)	# of Units	% Area Median Income	Proposed Rent
16 1-Bedroom	4	50%	\$ 459 net / \$531 gross
2-Bedroom			\$
17 3-Bedroom			\$
-Bedroom (Mgrs.)			\$
18 0-bedroom	5	30%	\$ 240 net / \$274 gross

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**Proposed Annual Operating Budget:**

20 Gross Potential Income	\$ 36,432
Vacancy: 5%	(1,822)
21 Effective Gross Income	\$ 34,610
Operating Expenses	(20,620)
22 Net Operating Income	\$ 13,990
23 Debt Service/Loan Amt.	\$ 100,000

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Rate: 0.00%	3%
Term: years	10 years
Annual Payment:	\$ 11,587
Total Debt Service	\$ 11,587
Annual Cash Flow	\$ 2,403
DCR	1.21

Market Demographics: (Provide bullet points under each area)

Economy:	<ul style="list-style-type: none"> <li>Major retail giants are locating in the county; Staples; Wal-Mart (site prep for opening); Petco; Jo-Ann's Fabrics; big % of sporting goods; Home Depot. The hospitality and cannery work remains seasonal but strong. Numerous establishments are opening in Seaside within the last month: Ace Hardware, All-rents; Beachcombers, NW and Bridgetown coffee</li> </ul>
Job Growth:	<ul style="list-style-type: none"> <li>Retail jobs are increasing; hospitality jobs remain steady; wood and fishing industry remain steady.</li> </ul>
Supply:	<ul style="list-style-type: none"> <li>Limited space for homeless persons.</li> </ul>
Demand:	<ul style="list-style-type: none"> <li>Demand continues to increase; point-in-time shelter count for 2012 increased 38% over the previous year; a 93% increase over the last four years.</li> </ul>

Sponsor Experience:	<ul style="list-style-type: none"> <li>CCHA owns and manages a Housing Plus project for homeless families; a HOME project; and Project-based Sec 8 senior and disabled housing; and several non-program properties</li> </ul>
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Proposed Resident Services:	<ul style="list-style-type: none"> <li>Parenting; life skills; nutrition (cooking, safe food handling), credit/money management; support groups; mentoring; volunteer opportunities; job training, behavioral modification, drug/alcohol counseling, education, physical health concerns</li> </ul>
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OHCS Funds Reserved:	\$ 500,000 HDGP
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Recommended Motion:	To approve an HDGP grant in an amount up to \$500,000 to the Clatsop County Housing Authority for the rehabilitation of Hyak located in Seaside, Oregon. Award is contingent on meeting all program requirements and conditions of award.
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**2012 CFC HOUSING COUNCIL REPORT**

Project Name:	Firestone Place	No. of Units:	5
Project Address:	435 East Ellendale Avenue	County:	Polk
Project City/St/Zip:	Dallas, Oregon, 97338	US House Dist.:	005
Sponsor Name:	Polk Community Development Corporation	State Senate Dist.:	012
Consultant:	Geller Silvis & Associates, Inc.	State House Dist.:	023
Architect:	Rex Price Architecture LLC	Years of Affordability(60 yr. Min):	60
Contractor:	Grand/Benedicts, Inc.	Target Population:	Single Parents in Alcohol and Drug Recovery
Property Mgmt.:	Polk Community Development Corporation		

**Project Description (brief narrative):**

Firestone Place is a five unit supportive, transitional housing development for single parents who are serious about their recovery and potential reunification with their children. Firestone Place will provide a sober living environment, a supportive community of other recovering addicts, and an opportunity to be reunited with their children in their own home. The site is readily buildable, and is within walking distance to vital service, retail and employment locations, including the local DHS office, Chemeketa Community College, Walmart and the like. As most of these residents do not drive, this feature of the location is ideal.

In 2010, OHCS made a strategic investment in Polk County to address the glaring void in the continuum of treatment and recovery by funding the five unit development, Jen's Place, the first ever transitional drug and alcohol free housing in Polk County for single parents in recovery and their children. This remarkable model was the outcome of an inter-agency collaboration including Polk County Commissioners, Polk County Drug Court, the local District Attorney's office, Community Corrections, DHS Child Welfare, local law enforcement officials, and Polk County Mental Health, along with housing provider and Sponsor, Polk CDC. Jen's Place has been an unqualified success. The five single parents now have custody of their children, are working hard on their recovery, and are advancing their education, parenting skills, and employability, including enrollment at the local Community College. The collaborating agencies are pleased with the improvement in the lives of the affected parents and their children as well as with the reduction in cost impacts in both the corrections and foster care systems. Firestone Place, which will be immediately adjacent to Jen's Place, will provide another 5 transitional units, with an identical model of services and recovery supervision.

Today, there remains a community need for more than 50 units of drug and alcohol free housing in Polk County. Firestone Place will bridge less than 10% of this gap. The recovering parents are typically recommended for residency by their case managers from the collaborative work of service providers, corrections and DHS. These providers will follow the residents through an intensive ongoing recovery plan during their occupancy at Firestone Place. Polk CDC will also provide additional services. Although most of the residents begin with only TANF income, the local Housing Authority has made transitional housing a "local preference" for Section 8 Housing Choice Vouchers and this assistance supports the rents planned, as it does for Jen's Place.

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 2 OCHS has identified alcohol and drug free housing as a Priority 1 for Polk County. The City Manager for  
 the City of Dallas has submitted a letter attesting to the fact that the City "fully supports" this development.  
 3 Polk CDC is contributing a portion of the land to the development. The project has also been awarded an  
 Alcohol and Drug Free Housing Development award of \$200,000 from the Oregon Health Authority.

4 Project and Unit Information: ("X" all boxes which apply)

5  New Construction       Multi-Family Rental Housing       Elderly/Disabled  
 Acquisition       Single-Family Housing       Independent Living  
 6  Rehabilitation       Homeless Shelter       Modular Units  
 Vacant       Transitional Housing       Congregate/Assisted Living  
 Occupied       Group Home: \_\_\_\_\_ (# units)       SRO

8 If rehabilitation, year  
 built: \_\_\_\_\_

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 10  Family       Persons with HIV/AIDS       Alcohol/Drug Recovery  
 Elderly       Psychiatrically Disabled (CMI)       Ex-Offenders  
 11  Physically Disabled       Developmentally Disabled       Homeless  
 Farmworkers       Permanent Supportive Hsg.      Other: \_\_\_\_\_  
 Transitional housing       Victims of Domestic Violence      Other: \_\_\_\_\_

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 14  1 Number of units accessible to the disabled      \_\_\_\_\_ Number of units that will be visitable  
 5 Number of transitional housing units      \_\_\_\_\_ Number of beds, i.e., group home or dormitory  
 15  Number of internet connections in  
 2 community building (Resident Activities Rm.)       5 Number of units with high speed internet

16 **Proposed Sources and Uses**

17	Uses:	\$ Amount	Sources:	\$ Amount
18	Acquisition	\$ 63,517	HOME	\$ 560,860
	Construction/Rehab	\$ 962,511	Perm Loan/OAHTCs	
19	Development	\$ 253,887	Trust Fund	\$500,000
20			Weatherization	
21			HELP	
22			Tax Credit Equity	
			Deferred Developers Fee	
23			Other: Alcohol and Drug Free Housing	\$ 200,000

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		Funds	
		Other: Sponsor/Land Contribution	\$ 19,055
		Other:	
		Other:	
<b>Total:</b>	<b>\$ 1,279,915</b>	<b>Total:</b>	<b>\$ 1,279,915</b>

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Use	Total Cost	Cost per Unit	Cost per S.F.
Residential	\$ 1,279,915	\$ 255,983	\$ 245.15
Commercial	\$	\$	\$
<b>Total Cost</b>	<b>\$ 1,279,915</b>	<b>\$ 255,983</b>	<b>\$ 245.15</b>

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**Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):**

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Proposed Improvements	Description	Comments
<b>Exterior:</b>	Hardi-Plank	Painted, composite board lap siding
	Vinyl Window Assemblies	Vented Sliders
	Fiberglass French Doors	Integral Blinds
	Concrete Slab Entries/patios	Brushed Non-Slip Finish
	40 yr Asphalt Roof Shingles	Architectural Style and Color
	Rough Sawn Plywood Soffits	Painted
<b>Interior:</b>	Carpet	Green Recycled Content
	Interior Drywall and Paint	Low VOC Paint
	Wood Base Trim	Painted
	Wood Window Sill Trim	Painted
	Vinyl Sheet Flooring	Rounded Vinyl Transition strips
	Raised Panel Doors	Painted
	Wood Handrails at Stairs	Painted
<b>General:</b>	Ceiling Fan/lights	At Living Rooms
	Mini Blinds at all Windows	
	Full Size Refrigerators	

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Yes (x)    No (x)    N/A (x)

For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or exceeds OHCS's 30-year sustainability requirement.

      

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Relocation Plan (if applicable):
N/A

3 **Proposed Rents:**

Unit Size(s)	# of Units	% Area Median Income	Proposed Rent
1-Bedroom			\$
2-Bedroom	5	50%	\$559 Net Rent

6 **Proposed Annual Operating Budget:**

Gross Potential Income	\$ 33,540
Vacancy: 5%	\$ (1,677)
Effective Gross Income	\$ 31,863
Operating Expenses	\$ (23,005)
Net Operating Income	\$ 8,858
Debt Service/Loan Amt.	No debt
Rate: 0.00%	
Term: years	
Annual Payment:	\$
Total Debt Service	\$
Annual Cash Flow	\$
DCR	n/a

15 **Market Demographics: (Provide bullet points under each area)**

Economy:	<ul style="list-style-type: none"> <li>According to the <u>Statesman Journal</u>, on 03/27/12, Polk County has an unemployment rate of 9.1%</li> <li>The major industries of Polk County are agriculture, forest products, manufacturing, and education.</li> </ul>
Job Growth:	<ul style="list-style-type: none"> <li>In the last five years, Polk County lost Weyerhaeuser, a major employer that provided jobs to approximately 200 people. Additionally Tyco Electronics and a variety of small retail businesses have closed. Recently, Wal-Mart received approval to expand and this is very near the subject site. Additionally a grocery store located in downtown Dallas is under new ownership and has been successful.</li> </ul>
Supply:	<ul style="list-style-type: none"> <li>Polk CDC's Jen's Place, with five units of drug and alcohol free transitional housing for single parents and their children (completed in 2010), is the only housing of its kind in all of Polk County and maintains 100% occupancy.</li> <li>There is no other such housing planned in Polk County.</li> </ul>
Demand:	<ul style="list-style-type: none"> <li>There are more than 50 Polk County Drug Court and DHS referrals in the</li> </ul>

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	<p>target population waiting for affordable, drug and alcohol free housing to become available.</p> <ul style="list-style-type: none"><li>• This population is primarily parents who have been incarcerated for a drug-related offense and whose children are now in DHS custody. The population has been increasing locally at an approximate rate of 3% per year in recent years. More than 65% of these households are below 50% of area median income. Among this group most, upon initial occupancy, have only TANF income support. Recovery success is crucial to avoidance of permanent termination of their parental rights.</li><li>• The average household size for the target population is three people – a single parent and two children. These families need two bedroom units with in-unit washers/dryers and outdoor playground. The families also need housing that is walking distance to grocery stores, restaurants, and near bus transit.</li></ul>
<p>Sponsor Experience:</p>	<ul style="list-style-type: none"><li>• Firestone Place’s development is proposed by Polk Community Development Corporation, a highly respected nonprofit organization with CHDO status. It has more than 24 years’ experience in providing affordable housing complemented by a large array of resident services, including Financial Education, Summer Food programs, Homework Clubs, and first time home buyer classes. The organization has a stable, experienced Board of Directors and good financial condition. As a developer, Polk CDC is known for bringing its housing developments in on time and on budget. As an Owner, Polk CDC is in compliance with OHCS programs and standards.</li><li>• Polk CDC has developed 147 units of high quality affordable housing at 15 sites including Rickreall Creek (36 units), Woodbridge Meadow (40 units), Park West (19 units), Hillside Villa (6 units), EAST Place (5 units), Jen’s Place (5 units), El Glen Apartments (12 units), Log Cabin Place (6 units), 4 group homes comprised of 35 beds, and several single family lease-to-own homes and duplexes.</li></ul>
<p>Proposed Resident Services:</p>	<ul style="list-style-type: none"><li>• Case management will be provided by Polk County Mental Health &amp; Addictions, DHS-Child Welfare, Polk County Drug Court, and Polk County Community Corrections.</li><li>• One resident household will serve as the Resident Recovery Mentor, encouraging residents to follow their recovery plans and refer referrals to residents. The Resident Recovery Mentor will also be trained to recognize any signs of relapse or special needs in the residents.</li><li>• Parenting classes, family counseling, and child counseling will be offered by Polk County Mental Health &amp; Addiction.</li><li>• Polk CDC’s established resident services programs include financial education classes, life skill training, one on one counseling for credit repair and building, organized social activities, Homework Club for Kids,</li></ul>

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	and Summer Free Lunch and Activity.
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3 OHCS Funds Reserved:	HOME \$560,860; HDGP \$500,000
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4 Recommended Motion: 5	To approve a HOME grant in an amount up to \$560,860 and an HDGP grant in an amount up to \$500,000 to Polk Community Development Corporation for the new construction of Firestone Place in Dallas, Oregon. Award is contingent on meeting all program requirements and conditions of award
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**2012 CFC HOUSING COUNCIL REPORT**

Project Name:	The Jetty Apartments	No. of Units:	34
Project Address:	426 SE Jetty Ave	County:	Lincoln
Project City/St/Zip:	Lincoln City 97367	US House Dist.:	5
Co-Sponsor Names:	Community Development Corporation of Lincoln County and Guardian Real Estate Services	State Senate Dist.:	5
Consultant:	Gabriele Development Services	State House Dist.:	10
Architect:	Carlton Hart Architects	Years of Affordability(60 yr. Min):	60
Contractor:	LMC	Target Population:	Senior and Disabled making 50% MFI or less
Property Mgmt.:	Guardian Real Estate Services		

**Project Description (brief narrative):**  
 Transfer ownership of the existing RD Senior and Disabled project to a nonprofit Community Housing Development Organization (CHDO) – the Community Development Corporation of Lincoln County (LCDC) – and the for profit Guardian Development, LLC (Guardian) as co-sponsors. Complete a minor rehab to improve thermal and moisture protection and increase energy efficiency of the 17-year old building that is in good condition. The project will continue to provide RD rental assistance to seniors and those with disabilities and will extend the current affordability period an additional 27 years to 2072.

**Project and Unit Information: ("X" all boxes which apply)**

<input type="checkbox"/>	New Construction	<input checked="" type="checkbox"/>	Multi-Family Rental Housing	<input checked="" type="checkbox"/>	Elderly/Disabled
<input checked="" type="checkbox"/>	Acquisition	<input type="checkbox"/>	Single-Family Housing	<input type="checkbox"/>	Independent Living
<input checked="" type="checkbox"/>	Rehabilitation	<input type="checkbox"/>	Homeless Shelter	<input type="checkbox"/>	Modular Units
<input type="checkbox"/>	Vacant	<input type="checkbox"/>	Transitional Housing	<input type="checkbox"/>	Congregate/Assisted Living
<input checked="" type="checkbox"/>	Occupied	<input type="checkbox"/>	Group Home: _____ (# units)	<input type="checkbox"/>	SRO
If rehabilitation, year built: <u>1995</u>					

<input type="checkbox"/>	Family	<input type="checkbox"/>	Persons with HIV/AIDS	<input type="checkbox"/>	Alcohol/Drug Recovery
<input checked="" type="checkbox"/>	Elderly	<input type="checkbox"/>	Psychiatrically Disabled (CMI)	<input type="checkbox"/>	Ex-Offenders
<input checked="" type="checkbox"/>	Physically Disabled	<input type="checkbox"/>	Developmentally Disabled	<input type="checkbox"/>	Homeless
<input type="checkbox"/>	Farmworkers	<input type="checkbox"/>	Permanent Supportive Hsg.	Other: _____	
<input type="checkbox"/>	Transitional housing	<input type="checkbox"/>	Victims of Domestic Violence	Other: _____	

<u>2</u>	Number of units accessible to the disabled	<u>2</u>	Number of units that will be visitable
<u>23</u>	Number of transitional housing units	_____	Number of beds, i.e., group home or dormitory

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2 Number of internet connections in  
community building

All  
34\* Number of units with high speed internet

3

4 **Proposed Sources and Uses**

Uses:	\$ Amount	Sources:	\$ Amount
5 Acquisition	310,000	HOME	394,103
6 Construction/Rehab	356,149	Perm Loan/OAHTCs	
7 Development	260,205	Trust Fund	500,000
		Weatherization	32,251
		HELP	
		Tax Credit Equity	
		Deferred Developers Fee	
		Other:	
12 Total:	926,354	Total:	926,354

13

Use	Total Cost	Cost per Unit	Cost per S.F.
14 Residential	\$926,354	\$27,246	\$30.01
15 Commercial	\$	\$	\$
Total Cost	\$926,354	\$27,246	\$30.01

16

**Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):**

17

Proposed Improvements	Description	Comments
18 Exterior:		
19 Site work	Parking lots	Repave, seal, restripe, install signage and additional landscaping
20 Thermal and moisture protection of building envelop	Change flashing and railing details at upper decks Replace upper deck unit doors and selective windows Replace main entry doors	
23 Safety	Replace and add exterior lighting	

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Interior:		
Units	Clean and repair bathroom exhaust fans Install roll-in showers in accessible units	
Unit lighting	Install new Energy Star lighting fixtures inside units and on unit patios	
Common areas	Replace emergency exit signs	

7

Yes (x)    No (x)    N/A (x)

8 For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or exceeds OHCS's 30-year sustainability requirement.

      

9 Relocation Plan (if applicable):

10 Rehab work is modest and mostly will occur outside in parking lots and on the exterior building envelop. Work inside the units will be to replace lighting fixtures. There are five units that require work inside the kitchen or bathroom which will take less than half a day. Tenants of these units will have access to the community kitchen and bathrooms while the work is being done. No tenants will need to leave their units overnight. A budget of \$75 per unit to pay for meals and transportation expenses is included should a resident wish to go off site while work is being done in their kitchen or bathroom or while exterior work is being done outside of their unit.

13

**Proposed Rents:**

Unit Size(s)	# of Units	% Area Median Income	Proposed Rent inc. utilities
1-Bedroom	29	53	\$510
2-Bedroom	4	60	\$696
3-Bedroom			\$
2-Bedroom (Mgrs.)	1	Non income restricted	\$NA

18

**Proposed Annual Operating Budget:**

Gross Potential Income	\$ 212,453
Vacancy: 5%	\$(10,623)
Effective Gross Income	\$201,830
Operating Expenses	( 161,133 )
Net Operating Income	\$40,697
Debt Service/Loan Amt.	
Rate: 1.00%	
Term: 50 years	

1

2 Annual Payment:	\$37,080
Total Debt Service	\$37,080
3 Annual Cash Flow	\$3,617
4 DCR	1.10

5Market Demographics: (Provide bullet points under each area)

6 Economy:	The economy of Lincoln is expected to continue to depend on low paying wage jobs in the Tourism and Retail Trade sectors.
7 Job Growth:	Job growth is currently slightly negative and is expected to stabilize as the economy recovers.
8 Supply:	The supply of affordable housing is restricted by the availability of land that is constrained by topography and wetlands and that is used for more lucrative second home development.
9 Demand:	The vacancy rate is 1% or less and no additional units are planned. Reports estimate that 86% of renter households making 60% MFI or less are cost burdened.

11 Sponsor Experience:	Lincoln County Development Corporation, (LCDC,) designated as a Community Housing Development Corporation (CHDO) since 2002, began serving the needs of families, seniors and disabled low income residents of Lincoln County in 1992 and has been recognized by two OHCS with Excellence in Housing awards for coordination of resident services and for small developments. Guardian Development, LLC, founded in 1971, has evolved into a leading real estate management, investment and affordable housing development firm with an extensive portfolio of owned and managed affordable housing.
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16 Proposed Resident Services:	LCDC will organize events for building residents and also coordinate resident services with area providers to promote independence and suggest ways to maintain their health and safety.
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18 OHCS Funds Reserved:	HDGP \$500,000; HOME \$394,103; Weatherization \$32,251
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19 Recommended Motion:	To approve an HDGP grant in an amount up to \$500,000, a HOME grant in an amount up to \$394,103 and a Weatherization grant in an amount up to \$32,251 to Guardian Real Estate Services for the acquisition and rehabilitation of The Jetty Apartments located in the City of Lincoln City, Lincoln County, Oregon. Award is contingent on meeting all program requirements and conditions of this award.
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23

## 2012 CFC HOUSING COUNCIL REPORT

Project Name:	Applegate Apartments	No. of Units:	16
Project Address:	941 South 8 <sup>th</sup> Street	County:	Lane
Project City/St/Zip:	Cottage Grove, OR 97424	US House Dist.:	004
Sponsor Name:	Mainstream Housing, Inc.	State Senate Dist.:	004
Consultant:	Lunabridge	State House Dist.:	007
Architect:	N/A	Years of Affordability(60 yr. Min):	60
Contractor:	Castile Construction	Target Population:	Very low income and Developmental Disabilities
Property Mgmt.:	Mainstream Housing		

**Project Description (brief narrative):**

Mainstream Housing (MHI) is proposing to acquire and rehabilitate a 16 unit, two building apartment development near downtown Cottage Grove, Oregon. The development will target six units for households with developmental disabilities who can live semi-independently with support services with three units committed at or below 30% of median family income (MFI) and three at or below 50%MFI. All DD units will likely serve 30% MFI or below through the use of Section 8 vouchers. Nine units will be affordable to general family households at or below 50% MFI. One unit will be for a resident manager/resident services coordinator.

**Project and Unit Information: ("X" all boxes which apply)**

<input type="checkbox"/> New Construction	<input checked="" type="checkbox"/> Multi-Family Rental Housing	<input type="checkbox"/> Elderly/Disabled
<input checked="" type="checkbox"/> Acquisition	<input type="checkbox"/> Single-Family Housing	<input type="checkbox"/> Independent Living
<input checked="" type="checkbox"/> Rehabilitation	<input type="checkbox"/> Homeless Shelter	<input type="checkbox"/> Modular Units
<input type="checkbox"/> Vacant	<input type="checkbox"/> Transitional Housing	<input type="checkbox"/> Congregate/Assisted Living
<input checked="" type="checkbox"/> Occupied	Group Home: _____ (# units)	<input type="checkbox"/> SRO

If rehabilitation, year built: 1966

<input checked="" type="checkbox"/> Family	<input type="checkbox"/> Persons with HIV/AIDS	<input type="checkbox"/> Alcohol/Drug Recovery
<input type="checkbox"/> Elderly	<input type="checkbox"/> Psychiatrically Disabled (CMI)	<input type="checkbox"/> Ex-Offenders
<input type="checkbox"/> Physically Disabled	<input checked="" type="checkbox"/> 6 Developmentally Disabled	<input type="checkbox"/> Homeless
<input type="checkbox"/> Farmworkers	<input type="checkbox"/> Permanent Supportive Hsg.	Other: <u>1 Manager Unit</u>
<input type="checkbox"/> Transitional housing	<input type="checkbox"/> Victims of Domestic Violence	Other: _____

1  
 2 0 Number of units accessible to the disabled 0 Number of units that will be visitable  
0 Number of transitional housing units 0 Number of beds, i.e., group home or dormitory  
 3 0 Number of internet connections in  
0 community building 0 Number of units with high speed internet  
 4

**Proposed Sources and Uses**

Uses:	\$ Amount	Sources:	\$ Amount
Acquisition	\$ 642,989	HOME	\$ 525,000
Construction/Rehab	\$ 581,681	Perm Loan/OAHTCs	\$ 125,000
Development	\$ 130,330	Trust Fund	\$ 500,000
		Weatherization	
		HELP	
		Tax Credit Equity	
		Deferred Developer's Fee	
		Other: Private Grants	\$ 30,000
		Other: Sponsor Cash	\$ 175,000
		Other:	
		Other:	
<b>Total:</b>	<b>\$1,355,000</b>	<b>Total:</b>	<b>\$1,355,000</b>

Use	Total Cost	Cost per Unit	Cost per S.F.
Residential	\$ 1,355,000	\$ 84,687.50	\$ 131.40
Commercial			
<b>Total Cost</b>	<b>\$ 1,355,000</b>	<b>\$ 84,687.50</b>	<b>\$ 131.40</b>

17 **Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):**

Proposed Improvements	Description	Comments
<b>Exterior:</b>		
Siding	Remove and replace	
Decks	Rebuild in place	
Windows	Remove and Replace	
Roofing and gutters	Remove and replace	Some scope already completed
Signage	New signage package	
<b>Interior:</b>		



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2 Operating Expenses	(66,244)
3 Net Operating Income	\$ 12,084
4 Debt Service/Loan Amt.	
Rate: 4.02%	Assuming OAHTC
Term: 20 years	
5 Annual Payment:	\$ 9,106
Total Debt Service	\$ 9,106
6 Annual Cash Flow	\$ 2,978
7 DCR	1.33

8 Market Demographics: (Provide bullet points under each area)

9 Economy:	<ul style="list-style-type: none"> <li>• Rural, service based</li> </ul>
10 Job Growth:	<ul style="list-style-type: none"> <li>• Slow, but steady growth</li> </ul>
11 Supply:	<ul style="list-style-type: none"> <li>• Existing affordable units have long wait lists.</li> <li>• Existing market housing is often unaffordable, has extensive deferred maintenance, and maintains very low vacancy.</li> </ul>
12 Demand:	<ul style="list-style-type: none"> <li>• Has been strong over last three years.</li> </ul>

13 Sponsor Experience:	<ul style="list-style-type: none"> <li>• Owns, manages and provides resident services at 32 group homes and 4 affordable multi-family housing properties.</li> <li>• Provides unique integrated management/resident services model and integrated cross subsidized DD housing solution.</li> <li>• Has in-house construction and rehabilitation experience.</li> </ul>
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14 Proposed Resident Services:	<ul style="list-style-type: none"> <li>• Provided by MHI and in coordination with DD brokerages.</li> <li>• Based on current and successful MHI service programs.</li> </ul>
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15 OHCS Funds Reserved:	HOME \$525,000; Trust Fund \$500,000; OAHTC \$125,000
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16 Recommended Motion:	To approve a HOME grant in an amount up to \$525,000 and an HDGP grant in an amount up to \$500,000 to Mainstream Housing, Inc. for the acquisition/rehabilitation of Applegate Apartments in Cottage Grove, Oregon. Award is contingent on meeting all program requirements and conditions of award.
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## 2012 CFC HOUSING COUNCIL REPORT

Project Name:	Camas Ridge Apartments	No. of Units:	10
Project Address:	2995, 2975, 2991, 2981 West Toby Court	County:	Douglas
Project City/St/Zip:	Roseburg, Oregon 97471	US House Dist.:	Oregon 4th
Sponsor Name:	United Community Action Network	State Senate Dist.:	1
Consultant:	None	State House Dist.:	2
Architect:	Dallas Horn	Years of Affordability(60 yr. Min):	60
Contractor:	Not chosen	Target Population:	Alcohol/Drug Recovery
Property Mgmt.:	United Community Action Network		

**Project Description (brief narrative):**

Camas Ridge Apartments will help address a critical need for housing for those in recovery from substance abuse in Douglas County. Camas Ridge Apartments (Camas Ridge) is a 10-unit new construction, permanent housing project for individuals and families in Douglas County with at least one adult member in a recovery program for substance abuse. Camas Ridge will have 4 one-bedroom units, 4 two-bedroom units and 2 three-bedroom units. Units will be available to individuals and families with incomes at or below 50% of area median income, though rents are currently set at 34-35% of area median income to assure affordability to this population. Two units will be reserved for those who are homeless. United Community Action Network (UCAN) will provide social service-based property management for residents, and will have case managers available to provide resident services. Residents of Camas Ridge will benefit from Camas Ridge's close proximity to many of Roseburg's major social service agencies, stores, schools, parks and other community amenities. Residents will be able to access these amenities from a bus stop located 0.5 miles from the development. UCAN is modeling Camas Ridge after UCAN's highly successful Esperanza Circle and Liberty Pointe housing developments, which provide the only 12 units of permanent, service-enriched affordable housing to those in recovery from substance abuse in Douglas County.

16

**Project and Unit Information: ("X" all boxes which apply)**

- |                                                      |                                                                 |                                                           |
|------------------------------------------------------|-----------------------------------------------------------------|-----------------------------------------------------------|
| <input checked="" type="checkbox"/> New Construction | <input checked="" type="checkbox"/> Multi-Family Rental Housing | <input type="checkbox"/> Elderly/Disabled                 |
| <input type="checkbox"/> Acquisition                 | <input type="checkbox"/> Single-Family Housing                  | <input type="checkbox"/> Independent Living               |
| <input type="checkbox"/> Rehabilitation              | <input type="checkbox"/> Homeless Shelter                       | <input type="checkbox"/> Modular Units                    |
| <input type="checkbox"/> Vacant                      | <input type="checkbox"/> Transitional Housing                   | <input type="checkbox"/> Congregate/Assisted Living       |
| <input type="checkbox"/> Occupied                    | <input type="checkbox"/> Group Home: _____ (# units)            | <input type="checkbox"/> SRO                              |
| If rehabilitation, year built: _____                 |                                                                 |                                                           |
| <input checked="" type="checkbox"/> Family           | <input type="checkbox"/> Persons with HIV/AIDS                  | <input checked="" type="checkbox"/> Alcohol/Drug Recovery |
| <input type="checkbox"/> Elderly                     | <input type="checkbox"/> Psychiatrically Disabled (CMI)         | <input type="checkbox"/> Ex-Offenders                     |

22

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1 \_\_\_\_\_  
 2 \_\_\_\_\_ Physically Disabled \_\_\_\_\_ Developmentally Disabled X Homeless  
 3 \_\_\_\_\_ Farmworkers X Permanent Supportive Hsg. Other: \_\_\_\_\_  
 4 \_\_\_\_\_ Transitional housing \_\_\_\_\_ Victims of Domestic Violence Other: \_\_\_\_\_  
 5 \_\_\_\_\_ 1 Number of units accessible to the disabled \_\_\_\_\_ 5 Number of units that will be visitable  
 6 \_\_\_\_\_ Number of transitional housing units \_\_\_\_\_ Number of beds, i.e., group home or dormitory  
 7 \_\_\_\_\_ Number of internet connections in \_\_\_\_\_  
 8 \_\_\_\_\_ community building \_\_\_\_\_ 10 Number of units with high speed internet

**Proposed Sources and Uses**

Uses:	\$ Amount	Sources:	\$ Amount
Acquisition	\$ 178,181	HOME	\$ 999,431
Construction/Rehab	\$ 1,370,400	Trust Fund	\$ 500,000
Development	\$ 418,350	Weatherization	\$ 22,500
		HELP	\$ 120,000
		Deferred Dev. Fee	0
		Other: AMH	\$ 200,000
		Other: Meyer Memorial	\$ 125,000
<b>Total:</b>	<b>\$ 1,966,931</b>	<b>Total:</b>	<b>\$1,966,931</b>

Use	Total Cost	Cost per Unit	Cost per S.F.
Residential	\$ 1,966,931	\$196,693	\$ 200.83
Commercial	\$0	\$0	\$0
<b>Total Cost</b>	<b>\$ 1,966,931</b>	<b>\$196,693</b>	<b>\$ 200.83</b>

**Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):**

Proposed Improvements	Description	Comments
<b>Exterior:</b>		
Foundations	Slab on concrete	
Siding	Fiber cement siding	
Patios, outdoor storage	Secured	
<b>Interior:</b>		
Ind. Unit Ventilation		
Heat Pumps		
Flooring	Rug and vinyl	

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2 Refrigerators/ D.W.	Energy Star	
3 Water Heater	Solar	
4 Lighting	Compact Florescent	
<b>General:</b>		
Community Building		

5

Yes (x)    No (x)    N/A (x)

For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or exceeds OHCS's 30-year sustainability requirement.

      

7

Relocation Plan (if applicable):
N/A

9

**Proposed Rents:**

10 Unit Size(s)	# of Units	% Area Median Income	Proposed Rent
11 1-Bedroom	4	At or below 50%	\$350 (including utility allowance)
12 2-Bedroom	4	At or below 50%	\$410 (including utility allowance)
13 3-Bedroom	2	At or below 50%	\$470 (including utility allowance)
14 4-Bedroom (Mgrs.)	0		\$

**15 Proposed Annual Operating Budget:**

Gross Potential Income	\$ 40,868
16 Vacancy: 5%	(\$ 2,043)
17 Effective Gross Income	\$ 38,825
Operating Expenses	(\$ 37,540)
18 Net Operating Income	\$ 1,285
19 Debt Service/Loan Amt.	N/A
Annual Cash Flow	\$ 1,285
20 DCR	N/A

**21 Market Demographics: (Provide bullet points under each area)**

22 Economy:	<ul style="list-style-type: none"> <li>• Douglas County's economy has been highly reliant on the lumber and wood products industry.</li> <li>• The industry has long been contracting, and now makes up only 10% of the County's private sector jobs.</li> </ul>
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	<ul style="list-style-type: none"> <li>• The county unemployment rate for December 2011 was 12.3%, fifth highest in Oregon.</li> <li>• The number of service industry jobs is increasing, but these jobs have wages that are typically lower than those in the lumber/wood product sector.</li> <li>• Therefore, the State of Oregon currently has designated Douglas County as a distressed area.</li> </ul>
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Job Growth:	<ul style="list-style-type: none"> <li>• Total employment is forecast to increase by 16% in Douglas County by 2020.</li> <li>• Most new employment will be in the relatively low-paying service and office and administrative support sectors.</li> <li>• Far more jobs will be created due to replacement of current workers than due to growth.</li> </ul>
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Supply:	<ul style="list-style-type: none"> <li>• Currently, there are a total of 12 units of permanent, affordable housing for families with a member in recovery from substance abuse in Douglas County.</li> <li>• There are no permanent one-bedroom units for individuals or couples for this special needs population in Douglas County.</li> <li>• Of these permanent units, only six are located in Roseburg. The other six are located in Winston, which is a 15 minute drive from Roseburg. Residents in Winston have limited public transit access to Roseburg.</li> <li>• Douglas County has a total of 16 units of transitional housing for families with a member in recovery from substance abuse. Douglas County also has 11 units of alcohol/drug free transitional housing for ex-offenders. These units allow a maximum stay of two years.</li> </ul>
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Demand:	<ul style="list-style-type: none"> <li>• The total income-eligible household with a member in recovery from substance abuse is estimated to be 382 in Douglas County, the PMA.</li> <li>• Survey results estimate a move in rate of 82% resulting in a Total Marginal (surplus) Demand of 303 households.</li> <li>• The estimated capture rate 3.3%.</li> <li>• 73% of income-eligible individuals surveyed have an income of 30% of median or less.</li> <li>• Current vacancy rates of 1-2% for permanent housing for those in recovery from substance abuse suggest pent up demand for additional units.</li> <li>• The waiting list for UCAN's permanent and transitional housing for families with an adult member in recovery from substance abuse typically is in the neighborhood of 75 households.</li> </ul>
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Sponsor Experience:	<ul style="list-style-type: none"> <li>• UCAN has developed, and owns and operates 18 OHCS-funded projects totaling 86 units</li> <li>• UCAN specializes in developing and operating housing for special needs populations, and currently operates 67 units for these</li> </ul>
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<p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p>	<p>populations</p> <ul style="list-style-type: none"> <li>• UCAN has had great success in developing and operating two permanent affordable housing complexes with a total of 12 units for families with a member in recovery from substance abuse</li> <li>• UCAN has had similar success developing and operating two transitional affordable housing complexes with a total of 16 units for families with a member in recovery from substance abuse. UCAN also has successfully developed and operates 11 studio and one-bedroom alcohol/drug free units for the previously incarcerated.</li> <li>• UCAN's development and property management team have a combined 24 years of experience in developing and operating housing for those with special needs. UCAN's Executive Director started a housing authority and served as its director, and is a member of the Oregon State Housing Council.</li> </ul>
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<p>9 Proposed Resident Services:</p> <p>10</p> <p>11</p> <p>12</p> <p>13</p> <p>14</p> <p>15</p> <p>16</p> <p>17</p>	<ul style="list-style-type: none"> <li>• Provide direct services offered by UCAN, such as energy assistance, GED classes, life skills classes, computer classes and Head Start programming</li> <li>• Provide information and referral to array of community health and human service providers</li> <li>• Provide individualized case management as requested by residents</li> <li>• Determination of mid- and long-term service needs through ratings on a " Self-Sufficiency Scale"</li> <li>• Goal setting and wrap-around services based on assessment tools</li> <li>• Long term goal of increasing and stabilizing income</li> <li>• Work with the local substance abuse service provider to address both legal and illegal substance abuse</li> <li>• Take a community approach to service delivery, working with a variety of agencies to ensure comprehensive service provision</li> <li>• Track outcomes and annually assess the effectiveness of service delivery</li> <li>• Employ a social service based property management model when working with tenants</li> </ul>
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<p>18 OHCS Funds Reserved:</p>	<p>HDGP \$500,000; HOME; \$999,431; HELP \$120,000; LIWP \$22,500</p>
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<p>19 Recommended Motion:</p> <p>20</p> <p>21</p> <p>22</p>	<p>To approve an HDGP grant in an amount up to \$500,000, a HOME grant in an amount up to \$999,431, a HELP grant in an amount up to \$120,000, and a LIWP grant in an amount up to \$22,500 to United Community Action Network for the new construction of the Camas Ridge Apartments located in Roseburg, Oregon. Award is contingent on meeting all program requirements and conditions of award.</p>
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### 2012 CFC HOUSING COUNCIL REPORT

2

Project Name:	Eagle Landing	No. of Units:	55
Project Address:	990 Veterans Way	County:	Douglas
Project City/St/Zip:	Roseburg, OR 97470	US House Dist.:	4
Sponsor Name:	NeighborWorks Umpqua & UCAN	State Senate Dist.:	01
Consultant:	n/a	State House Dist.:	02
Architect:	Bergsund & Delaney	Years of Affordability(60 yr. Min):	75
Contractor:	Harmon Construction	Target Population:	Homeless veterans
Property Mgmt.:	Umpqua Community Property Mgmt.		

8 Project Description (brief narrative):

NeighborWorks Umpqua (NWU) and the United Community Action Network (UCAN) are developing Eagle Landing to house homeless veterans. Selected by the Veterans Administration in response to a nationwide Request For Proposal, NWU and UCAN will construct 54 units on the VA Medical Center Campus in Roseburg. NWU will manage the construction and construction financing processes and handle general property management. UCAN will coordinate case management and resident services. We will sign a 75 year lease for 4.76 acres with the VA at no charge.

The project will provide 54 units of permanent, supportive housing and one manager's unit: 44 units will be one bedroom. The remaining 10 units will house families with a member who is a veteran. These units will consist of eight 2-bedroom and two 3-bedroom units. There will be a community building which will serve as a focal point for comprehensive social service delivery. The complex will be certified LEED silver.

14 Project and Unit Information: ("X" all boxes which apply)

15 <input checked="" type="checkbox"/> New Construction	<input checked="" type="checkbox"/> Multi-Family Rental Housing	<input type="checkbox"/> Elderly/Disabled
<input type="checkbox"/> Acquisition	<input type="checkbox"/> Single-Family Housing	<input type="checkbox"/> Independent Living
16 <input type="checkbox"/> Rehabilitation	<input type="checkbox"/> Homeless Shelter	<input type="checkbox"/> Modular Units
17 <input type="checkbox"/> Vacant	<input type="checkbox"/> Transitional Housing	<input type="checkbox"/> Congregate/Assisted Living
<input type="checkbox"/> Occupied*	<input type="checkbox"/> Group Home: _____ (# units)	<input type="checkbox"/> SRO
18 If rehabilitation, year built:	_____	
19 _____		
20 <input checked="" type="checkbox"/> Family	<input type="checkbox"/> Persons with HIV/AIDS	<input type="checkbox"/> Alcohol/Drug Recovery
<input type="checkbox"/> Elderly	<input type="checkbox"/> Psychiatrically Disabled (CMI)	<input type="checkbox"/> Ex-Offenders
21 <input type="checkbox"/> Physically Disabled	<input type="checkbox"/> Developmentally Disabled	<input checked="" type="checkbox"/> Homeless
22 <input type="checkbox"/> Farmworkers	<input checked="" type="checkbox"/> Permanent Supportive Hsg.	Other: _____
<input type="checkbox"/> Transitional housing	<input type="checkbox"/> Victims of Domestic Violence	Other: _____
23 _____		

1

2 10 Number of units accessible to the disabled 28 Number of units that will be visitable  
 Number of transitional housing units Number of beds, i.e., group home or dormitory  
 3 Number of internet connections in  
 2 community building Number of units with high speed internet

**Proposed Sources and Uses**

Uses:	\$ Amount	Sources:	\$ Amount
Acquisition	\$ 1,260,000	HOME	\$ 900,000
Construction/Rehab	\$ 7,906,513	Trust Fund	\$ 200,000 (2011 CFC)
Development	\$ 2,978,487	HELP	\$ 200,000 (2011 CFC)
		Tax Credit Equity	\$ 7,592,000 (2011 CFC)
		Deferred Devel Fee	\$ 60,000
		Other: Veterans Admin	\$ 2,250,000 (awarded)
		Other: Meyer Memorial	\$ 500,000 (awarded)
		Other: Other Fndns	\$ 75,000 (awarded)
		Other: Eng Tr & Fndns	\$ 20,000
		Other: NeighborWorks	\$ 350,000 (\$200k Awarded)
<b>Total:</b>	<b>\$ 12,145,000</b>	<b>Total:</b>	<b>\$ 12,145,000</b>

Use	Total Cost	Cost per Unit	Cost per S.F.
Residential	\$ 12,145,000	\$ 220,818	\$ 274
Commercial	\$	\$	\$
<b>Total Cost</b>	<b>\$ 12,145,000</b>	<b>\$ 220,818</b>	<b>\$ 274</b>

**Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):**

Proposed Improvements	Description	Comments
<b>Exterior:</b>		
Roofing	Composition	Light color to maximize reflectivity
Framing & Siding	Wood frame, Fiber cement siding	
Foundation	Slab on grade	
Porches	Covered slap entrances	
Bicycle & Smoking shelters	Wood framed, covered	Separated from buildings but accessible
<b>Interior:</b>		
sheetrock	Unit walls typical	

Sheet flooring	Tarkett Footnotes wood grain	or Marmoleum 'Elementary Line throughout
Kitchen and bath countertops	Plastic laminate	
Walls, ceilings, interior trim	Low VOC paints	
Appliances	Ranges, refrigerators, hoods,	All Energy Star and highly efficient HVAC
HVAC	Mini-split	High efficiency to help meet LEED Silver
<b>General:</b>		
Laundry rooms	Sheet floor with wainscot, laminate folding counter	Laundry room with 4 washers and 4 dryers in the community building. The additional laundry building has views to play area behind family units and has an additional 3 washers and 4 dryers.
Play structure and garden plots	Community garden plots for residents	Sited behind the family units adjacent to laundry room
Community Building	Attached manager unit	Same basic materials as residential

10

Yes (x)    No (x)    N/A (x)

For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or exceeds OHCS's 30-year sustainability requirement.

      

12

Relocation Plan (if applicable).
n/a

**Proposed Rents:**

Unit Size(s)	# of Units	% Area Median Income	Proposed Rent
1-Bedroom	44	50%	\$494 to \$532
2-Bedroom	8	50%	\$593 to \$687
3-Bedroom	2	50%	\$685 & \$833
3 -Bedroom (Mgrs.)	1	n/a	\$0

18

**Proposed Annual Operating Budget:**

Gross Potential Income	\$ 368,112
Vacancy: 6%	\$ (22,087)
Effective Gross Income	\$ 346,025
Operating Expenses	\$ (327,528)
Net Operating Income	\$ 18,497
Debt Service/Loan Amt.	\$ 378,000
Rate:	0.00%
Term:	60 years

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Annual Payment:	\$ 6,300
Total Debt Service (incl deferred devel. Fee)	\$ 13,590
Annual Cash Flow	\$ 4,907
DCR	1.36

5 Market Demographics: (Provide bullet points under each area)

Economy:	Local industrial diversification in the 1990's was set back by the 2008 recession. The economic growth conditions in Southwest Oregon still lag behind the nation's growth, and the small towns in Coos, Curry & Douglas counties are still feeling the negative factors. Jan 2012 unemployment in Douglas Co was 12% (Oregon 8.8% and US 8.0%)
Job Growth:	Grape production and wineries are a major agricultural growth area in Douglas County with Oregon sales in excess of \$252 million in 2010, one half of which is from out-of-state buyers. This new industry expansion may prove an economic stimulus with the cluster industries that are beginning to surface. There also may be additional tourist accommodations and an upgrading of the types of restaurants available. Our Micro-enterprise and Think Local Umpqua efforts are supporting smaller entrepreneurs in the agricultural area which may also link to the upsurge in viticulture.
Supply:	There is no other housing for homeless veterans in Southern Oregon other than 35 units in Lane County. (Lane County's one night homeless count was 252 veterans)
Demand:	<ul style="list-style-type: none"> <li>• The one-night homeless count in the primary market area in 2011 was 692.</li> <li>• The market study shows a marginal demand of 900 homeless veteran households in the primary market area</li> <li>• The 2011 CHALENG report showed an 86% increase in homeless Veteran families. Fourteen percent of Veterans placed with vouchers have children. Homeless Veterans who served in Iraq and Afghanistan are more likely to have family or children that also require assistance. (Given this we are proposing 10 family units)</li> </ul>

Sponsor Experience:	Neighborworks Umpqua: 22 projects, 10 w/ LIHTC / UCAN: 8 projects, all with HOME
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Proposed Resident Services:	<ul style="list-style-type: none"> <li>• Full time case manager separate from the full time property manager.</li> <li>• Individualized assessment to determine specific needs</li> <li>• Specific services targeting immediate, medium and long term needs. These range from acquiring food stamps and clothing, to help getting legal services and improving credit, to job training and placement.</li> </ul>
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OHCS Funds Reserved:	HOME \$900,000
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Recommended Motion:	To approve a HOME grant in an amount up to \$900,000 to Neighborworks Umpqua for the new construction of Eagle Landing located in Roseburg, Oregon. Award is contingent on meeting all program requirements and conditions of award.
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**2012 CFC HOUSING COUNCIL REPORT**

Project Name:	Hyde Park	No. of Units:	6
Project Address:	2272 Dollarhide Way	County:	Jackson
Project City/St/Zip:	Ashland, OR 97520	US House Dist.:	002
Sponsor Name:	ACCESS	State Senate Dist.:	003
Consultant:		State House Dist.:	005
Architect:	Jerome White	Years of Affordability(60 yr. Min):	60
Contractor:	John Fields, owner Golden-Fields Construction	Target Population:	Workforce/Family
Property Mgmt.:	ACCESS		

**Project Description (brief narrative):**

Hyde Park is a new construction project consisting of one building, two stories and 6 units of affordable housing targeted to families and individuals whose incomes are at or below 50% and 60% of the AMI. The site/property is located in Ashland, Oregon in Jackson County. It is an in-fill lot surrounded by a newer subdivision of single-family and townhome style buildings.

**Project and Unit Information: ("X" all boxes which apply)**

- |                                                      |                                                                 |                                                        |
|------------------------------------------------------|-----------------------------------------------------------------|--------------------------------------------------------|
| <input checked="" type="checkbox"/> New Construction | <input checked="" type="checkbox"/> Multi-Family Rental Housing | <input type="checkbox"/> Elderly/Disabled              |
| <input type="checkbox"/> Acquisition                 | <input type="checkbox"/> Single-Family Housing                  | <input checked="" type="checkbox"/> Independent Living |
| <input type="checkbox"/> Rehabilitation              | <input type="checkbox"/> Homeless Shelter                       | <input type="checkbox"/> Modular Units                 |
| <input type="checkbox"/> Vacant                      | <input type="checkbox"/> Transitional Housing                   | <input type="checkbox"/> Congregate/Assisted Living    |
| <input type="checkbox"/> Occupied                    | <input type="checkbox"/> Group Home: _____ (# units)            | <input type="checkbox"/> SRO                           |

If rehabilitation, year built: \_\_\_\_\_

- |                                               |                                                         |                                                |
|-----------------------------------------------|---------------------------------------------------------|------------------------------------------------|
| <input checked="" type="checkbox"/> Family    | <input type="checkbox"/> Persons with HIV/AIDS          | <input type="checkbox"/> Alcohol/Drug Recovery |
| <input type="checkbox"/> Elderly              | <input type="checkbox"/> Psychiatrically Disabled (CMI) | <input type="checkbox"/> Ex-Offenders          |
| <input type="checkbox"/> Physically Disabled  | <input type="checkbox"/> Developmentally Disabled       | <input type="checkbox"/> Homeless              |
| <input type="checkbox"/> Farmworkers          | <input type="checkbox"/> Permanent Supportive Hsg.      | Other: _____                                   |
| <input type="checkbox"/> Transitional housing | <input type="checkbox"/> Victims of Domestic Violence   | Other: _____                                   |

- |                                                      |                                                 |
|------------------------------------------------------|-------------------------------------------------|
| <u>2</u> Number of units accessible to the disabled  | <u>4</u> Number of units that will be visitable |
| Number of transitional housing units                 | Number of beds, i.e., group home or dormitory   |
| Number of internet connections in community building | Number of units with high speed internet        |

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**Proposed Sources and Uses**

Uses:	\$ Amount	Sources:	\$ Amount
Acquisition	\$ 131,490	HOME	\$ 500,000
Construction/Rehab	\$ 822,297	Perm Loan	\$ 50,000
Development	\$ 230,948	Trust Fund	\$ 441,173
		Weatherization	Not available here
		HELP	
		Tax Credit Equity	
		Deferred Developers Fee	\$ 15,000
		Other: Ashland CDBG	\$ 136,142
		Other: Ashland Energy	\$ 1,635
		Other: SDC's & School	\$ 40,285
		Other: ACCESS	\$ 500
<b>Total:</b>	<b>\$ 1,184,735</b>	<b>Total:</b>	<b>\$ 1,184,735</b>

Use	Total Cost	Cost per Unit	Cost per S.F.
Residential	\$ 1,184,735	\$ 197,456	\$ 207.09
Commercial	\$	\$	\$
<b>Total Cost</b>	<b>\$ 1,184,735</b>	<b>\$ 197,456</b>	<b>\$ 207.09</b>

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**Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):**

Proposed Improvements	Description	Comments
<b>Exterior:</b>	Lap siding	Fiber Cement with a 50 year warranty
<b>All units</b>	Patios or balconies	
	Covered Bike Parking	
<b>Interior:</b>	Flooring	Carpet, vinyl and colored concrete
	Ashland Fiber Network	
	Fire Suppression System	
<b>3 bedroom units</b>	Built in benches in Dining	
	Low VOC paint, sealants,	caulking and adhesives
	Water heaters	High efficiency
	Heating/cooling	Multi-zone mini split system
<b>General:</b>	Onsite storm water control	Bio-retention system
	Separate Laundry Rm.	2 washers/2 dryers

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Yes (x)    No (x)    N/A (x)

2 For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or  
exceeds OHCS's 30-year sustainability requirement.

      

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4 Relocation Plan (if applicable):  
5 Not applicable

6 **Proposed Rents:**

7 Unit Size(s)	# of Units	% Area Median Income	Proposed Rents(all at 50%)
1-Bedroom	3	49%	\$490
8 2-Bedroom	1	48%	\$580
9 3-Bedroom	2	48%	\$660

10 **Proposed Annual Operating Budget:**

11 Gross Potential Income	\$ 41,190	
12 Vacancy: 8%	\$ (3,295)	
Effective Gross Income	\$ 37,895	
13 Operating Expenses	\$ (29,730)	
Net Operating Income	\$ 8,165	
Debt Service/Loan Amt.	\$ 50,000	\$15,000
14 Rate: 0.00%	5.13%	2%
15 Term: years	20 years	6 years
Annual Payment:	\$ 4,001	\$ 2,655
16 Total Debt Service	\$ 6,656	
17 Annual Cash Flow	\$ 1,508	
DCR	1.23	

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19 **Market Demographics: (Provide bullet points under each area)**

20 Economy:	Jackson County continues to be one of the hardest hit County's in the State
21 Job Growth:	Limited to service sector and retail employment
22 Supply:	Decrease in affordable housing due to condo conversions & affordable units converting to market rate units
Demand:	Increase in demand due to slow economy & high unemployment

23 **Sponsor Experience:**    Developing ,managing and ownership of affordable housing since 1994

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Proposed Resident Services:	Services to enhance resident self-sufficiency and maintain the long term viability of the property.
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OHCS Funds Reserved:	HDGP \$441,173; HOME \$500,000
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Recommended Motion:	To approve an HDGP grant in an amount up to \$441,173 and a HOME grant in an amount up to \$500,000 to ACCESS for the new construction of Hyde Park Apartments located in the City of Ashland, Jackson County, Oregon. Award is contingent on meeting all program requirements and conditions of this award.
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### 2012 CFC HOUSING COUNCIL REPORT

2 Project Name:	Trail Apartments	No. of Units:	24
3 Project Address:	295 NE Boardman Avenue	County:	Morrow
4 Project City/St/Zip:	Boardman, Oregon 97818	US House Dist.:	57
5 Sponsor Name:	Housing Authority of the County of Umatilla	State Senate Dist.:	29
Consultant:	CASA of Oregon	State House Dist.:	2
6 Architect:	Pinnacle Architecture	Years of Affordability(60 yr. Min):	60
7 Contractor:	To be determined	Target Population:	Families
8 Property Mgmt.:	Housing Authority of the County of Umatilla		

9 Project Description: (brief narrative):

10 The Housing Authority of the County of Umatilla (UCHA) is proposing to acquire and rehabilitate Trail Apartments, an existing 24 unit USDA Rural Development Section 515 housing project in Boardman, Oregon. This project is targeted to low income families earning less than 60% of the area median income. The property is 100% occupied. Nineteen of the 24 tenant units have RD project-based rental assistance ensuring families not pay more than 30% of their income on their housing, which makes this project a "Big P" preservation project.

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13 The complex sits on 1.5 acres zoned multi-family and consists of seven buildings in total and all units are two bedrooms. A Community Building will be built and will house a management office with regular access to the resident manager, a meeting space for classes, meetings and social events, a laundry room with five washers and five dryers and storage for maintenance equipment. There will also be a play ground for children.

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15 Project and Unit Information: ("X" all boxes which apply)

<input type="checkbox"/> New Construction	<input checked="" type="checkbox"/> Multi-Family Rental Housing	<input type="checkbox"/> Elderly/Disabled
<input checked="" type="checkbox"/> Acquisition	<input type="checkbox"/> Single-Family Housing	<input type="checkbox"/> Independent Living
<input checked="" type="checkbox"/> Rehabilitation	<input type="checkbox"/> Homeless Shelter	<input type="checkbox"/> Modular Units
<input type="checkbox"/> Vacant	<input type="checkbox"/> Transitional Housing	<input type="checkbox"/> Congregate/Assisted Living
<input checked="" type="checkbox"/> Occupied	<input type="checkbox"/> Group Home: _____ (# units)	<input type="checkbox"/> SRO
19 If rehabilitation, year built: _____	1980	
<input checked="" type="checkbox"/> Family	<input type="checkbox"/> Persons with HIV/AIDS	<input type="checkbox"/> Alcohol/Drug Recovery
<input type="checkbox"/> Elderly	<input type="checkbox"/> Psychiatrically Disabled (CMI)	<input type="checkbox"/> Ex-Offenders
<input type="checkbox"/> Physically Disabled	<input type="checkbox"/> Developmentally Disabled	<input type="checkbox"/> Homeless
<input type="checkbox"/> Farmworkers	<input type="checkbox"/> Permanent Supportive Hsg.	Other: _____
<input type="checkbox"/> Transitional housing	<input type="checkbox"/> Victims of Domestic Violence	Other: _____

1	1	Number of units accessible to the disabled	24	Number of units that will be visitable
2	0	Number of transitional housing units	0	Number of beds, i.e., group home or dormitory
3	0	Number of internet connections in community building	0	Number of units with high speed internet

**Proposed Sources and Uses**

Uses:	\$ Amount	Sources:	\$ Amount
Acquisition	\$ 979,115	HOME	\$ 503,703
Construction/Rehab	\$ 2,643,363	Tax Credit Equity	\$ 4,013,219
Development	\$ 62,515	Deferred Developers Fee	\$ 0
General Fees	\$ 869,009	Trust Fund (HDGP)	\$ 200,000
Financing, Interest	\$ 10,000	Other: USDA RD	\$ 305,000
Reserves, Contingency	\$ 457,920		
<b>Total:</b>	<b>\$ 5,021,922</b>	<b>Total:</b>	<b>\$ 5,021,922</b>

Use	Total Cost	Cost per Unit	Cost per S.F.
Residential	\$5,021,922	\$209,247	\$295
Commercial	\$0	\$0	\$0
<b>Total Cost</b>	<b>\$5,021,922</b>	<b>\$209,247</b>	<b>\$295</b>

**Provide a brief description of improvements (for both new construction and acquisition/rehabilitation):**

Proposed Improvements	Description	Comments
<b>Exterior:</b>	<ul style="list-style-type: none"> <li>• Parking Lot - replace damaged areas, seal all cracks, sealcoat entire surface, and stripe with new parking signage</li> <li>• Grading – address grading &amp; siding clearance issues</li> <li>• Landscaping &amp; irrigation</li> <li>• Trash enclosures – replace w/CMU walls and steel gates w/concrete slab</li> <li>• Concrete flatwork – replace existing concrete walkways</li> <li>• Crawl space vents – install new crawl space vent &amp; cover at unit patios</li> <li>• Crawl space access covers – replace covers with steel</li> <li>• Unit entry patios – replace all entry concrete flatwork, elevated to provide accessible entry to each unit</li> <li>• Entry stairways &amp; landings – repair/reconfigure entry stairways</li> <li>• Decks – replace front and rear deck systems with new PT framing &amp; Trex drip through decking</li> <li>• Roof framing – add pitched trusses over all flat roof locations; existing roof joists &amp; drywall ceiling to remain</li> <li>• Window sills &amp; scribe – prefinished hemlock sill &amp; scribe molding at window surrounds</li> </ul>	

1		<ul style="list-style-type: none"> <li>• Siding – full tear-off &amp; replace with Hardi Color Plus over rain screen</li> <li>• Rigid Insulation – install 1” rigid insulation over existing sheathing</li> </ul>	
2		<ul style="list-style-type: none"> <li>• Gutters &amp; Downspouts – remove &amp; replace with prefinished</li> </ul>	
3		<ul style="list-style-type: none"> <li>• Roofing – replace all roofing with new standing seam metal</li> </ul>	
4		<ul style="list-style-type: none"> <li>• Attic insulation – add blow-in R38 insulation at new attic spaces</li> </ul>	
5		<ul style="list-style-type: none"> <li>• Windows – replace all windows and slider doors with new vinyl</li> </ul>	
6		<ul style="list-style-type: none"> <li>• Exterior Doors – Pre-hung fiberglass, wood jam, and hardware</li> </ul>	
7		<ul style="list-style-type: none"> <li>• Paint – repaint exterior</li> <li>• Unit signage – replace with vinyl plaque</li> <li>• Building signage – replace with vinyl plaque</li> <li>• Dry rot repairs – framing repairs to exterior walls</li> <li>• Porch lighting – replace with energy star</li> <li>• GFCI outlets – replace exterior outlets with GFCI and weatherproof box</li> </ul>	
8	<b>Interior:</b>	<ul style="list-style-type: none"> <li>• Demolish &amp; Disposal of interior finishes</li> <li>• ADA unit upgrades - Minor improvements of existing ADA units</li> </ul>	
9		<ul style="list-style-type: none"> <li>• Interior Doors &amp; Millwork – replace all interior doors, trim and base with stain grade wood</li> </ul>	
10		<ul style="list-style-type: none"> <li>• Paint – Paint interiors complete</li> </ul>	
11		<ul style="list-style-type: none"> <li>• Unit flooring – complete unit, demo all existing. Linoleum in kitchens and bathrooms, carpet living room and bedrooms</li> </ul>	
12		<ul style="list-style-type: none"> <li>• Unit drywall repairs – allowance for drywall repairs to interior units</li> </ul>	
13		<ul style="list-style-type: none"> <li>• Bath hardware – replace paper holder, towel bar, and shower rod</li> </ul>	
14		<ul style="list-style-type: none"> <li>• Medicine cabinets – replace with new</li> </ul>	
15		<ul style="list-style-type: none"> <li>• Range – 30” standard freestanding</li> </ul>	
16		<ul style="list-style-type: none"> <li>• Refrigerator – whirlpool energy star</li> </ul>	
17		<ul style="list-style-type: none"> <li>• Range hood – replace existing with new vented</li> </ul>	
18		<ul style="list-style-type: none"> <li>• Cabinets (kitchen &amp; bath) – complete replacements with plywood box and hardwood doors</li> </ul>	
19		<ul style="list-style-type: none"> <li>• Countertops (kitchen &amp; bath) – replace all kitchen and bath</li> </ul>	
20		<ul style="list-style-type: none"> <li>• Window coverings – PVC vertical blinds</li> <li>• Kitchen sink &amp; faucet – stainless single bowl sink with Moen low flow faucet</li> <li>• Bath sink &amp; faucet – 19” round china sink with Moen low flow faucet</li> <li>• Toilet – Toto 1.28 GPF</li> <li>• Tub/Shower – replace tub, surround, and valve</li> <li>• Water heaters – replace all with 50 gallon high efficiency electric</li> <li>• Interior light fixtures – replace interior fixtures with new Energy Star</li> </ul>	

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<b>General:</b>	<ul style="list-style-type: none"> <li>• Community building – existing community building will be demolished; Build new one</li> <li>• Site signage – allowance for miscellaneous site signage</li> <li>• Hand railings &amp; guardrails – replace all guard railings and continuous grab rails with galvanized steel</li> <li>• Site lighting – replace building mounted site lighting and require exposed conduit to within wall cavity</li> <li>• Hose bibs – replace with frost free</li> <li>• Fire extinguishers – replace extinguisher and boxes with new recessed cabinet</li> <li>• Cable TV – allowance to run new satellite wiring and/or cable tv</li> <li>• Exhaust ductwork – repair/replace ductwork for existing exhaust fans. Strap and insulate all ductwork in attic spaces</li> <li>• Monument sign</li> </ul>	
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Yes (x)    No (x)    N/A (x)

For Acquisition/Rehabilitation Projects: The scope of rehabilitation meets or exceeds OHCS's 30-year sustainability requirement.

      

**Relocation Plan (if applicable):**

No tenants will be permanently displaced. Taking the \$170,000 allowed for relocation and dividing by the 24 units equals \$7,083/unit. This amount covers costs to temporarily locate all 24 families at a local motel, per diem, moving, storage, insurance and utility costs.

**Proposed Rents:**

Unit Size(s)	# of Units	% Area Median Income	Proposed Rent
2-Bedroom	24	50%	\$593.00
-Bedroom (Mgrs.)	N/A	N/A	\$N/A

**Proposed Annual Operating Budget:**

Gross Potential Income	\$ 153,504
Vacancy: 5%	(\$7,943)
Effective Gross Income	\$ 150,921
Operating Expenses	(\$130,602)
Net Operating Income	\$ 20,319
Debt Service/Loan Amt.	\$ 305,000
Rate: 0.0%	.01%
Term: years	30 years
Annual Payment:	\$ 711,772
Total Debt Service	\$ 11,772
Annual Cash Flow	\$ 8,547
DCR	1.73

1 **Market Demographics: (Provide bullet points under each area)**

2 3 4 Economy:	<ul style="list-style-type: none"> <li>• The regional economy is entering Growth Metro Product (GMP) growth in Morrow County averaged 6.7% annually between 2002 and 2011, 290 basis points higher than statewide growth of 3.8% annually</li> <li>• Morrow County is forecast to average GMP growth of 5.1% annually between 2012 and 2016</li> </ul>
5 6 7 Job Growth:	<ul style="list-style-type: none"> <li>• Median household income in Morrow County increased at an average rate of 2.6% between 2002 and 2011, compared to income growth of 1.6% and 2.0% annually respectively in Oregon and U.S.</li> <li>• According to Market Study, over the past 12 months employment in the county increased 1.5% compared to Oregon's employment growth of 0.7% over the same period of time</li> <li>• Largest employment sector in Morrow County is Manufacturing, with approximately 31.3% of the local workforce</li> </ul>
8 9 10 11 12 13 Supply:	<ul style="list-style-type: none"> <li>• According to Market Analyst, Castle Rock Apartments, a 40 unit affordable farmworker housing project (construction schedule to complete in fall 2012), presents a potential competition for the Trail Apartments; however, it does not appear to have a negative impact on the Trail Apartments competitive position due to the high demand for affordable housing within market</li> <li>• Market analysis states, there are no plan affordable housing developments in the local and immediate area that would provide negative competition</li> <li>• According to Market Analyst, based on current inventory, the PMA is considered to be under supplies from an affordable housing basis. Conclusions are based on the low vacancy levels and wait list for competing affordable projects within the region</li> </ul>
14 15 16 17 18 19 Demand:	<ul style="list-style-type: none"> <li>• According to Market Analysis conducted by Cushman &amp; Wakefield of Oregon, occupancy levels of most directly competing properties ranged from 95% to 100%, with an average of 99.2%</li> <li>• Market analysis data forecast a stabilized occupancy for the project at 98% given the substantial demand for affordable housing within the PMA</li> <li>• There are 361 families in UCHA's waiting for housing vouchers in Gilliam, Morrow, Umatilla and Wheeler County</li> <li>• Properties surveyed indicated a wait list for two bedroom units totaled 145 families</li> <li>• For applicants under 30% of the AMI, the current wait list is estimated at eight to ten months</li> </ul>

20 21 22 23 Sponsor Experience:	<ul style="list-style-type: none"> <li>• Organized in 1949</li> <li>• Developed 372 units of multi-family rental housing, of which 40 units are currently under construction</li> <li>• Own and manage all of their properties</li> <li>• Has built or renovated most of its housing stock over the last 10 years</li> <li>• Manage 329 Housing Choice Vouchers under HUD's Section 8 program</li> <li>• Received a standard performance rating from HUD</li> </ul>
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Proposed Resident Services:	<ul style="list-style-type: none"> <li>• Community room will allow residents to utilize meeting room for meetings,</li> </ul>
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1		activities or social gatherings
2		• Resident Manager will coordinate use of community room with service
3		providers for onsite services and resident meetings
4		• UCHA will ensure successful link between residents and outside services
5		• Determine appropriate resident needs on a case by case basis
		• Maintain up to date contacts and resource information for a variety of
		social services
		• Provide tenants with list of agencies in the community

6	OHCS Funds Reserved:	\$200,000 HDGP; \$503,703 HOME; \$466,700 LIHTC
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7	Recommended Motion:	<i>To approve a HDGP grant in an amount up to \$200,000, a HOME grant in an</i>
8		<i>amount up to \$503,703 to the Housing Authority of Umatilla County for the</i>
9		<i>acquisition/rehabilitation of the Trail Apartments located in Boardman, Oregon.</i>
		<i>Award is contingent on meeting all program requirements and conditions of</i>
		<i>award.</i>

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