



OHCS Budget Presentation: Supplementary Materials

**2025-27 Biennium
March 2025**



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Oregon Housing and Community Services (OHCS)

Oregon Housing and Community Services is Oregon's housing finance agency, providing financial and program support to create and preserve opportunities for quality, affordable housing for Oregonians of lower and moderate incomes.

Vision: All Oregonians have the opportunity to pursue prosperity and live free from poverty.

Mission: To provide stable and affordable housing and engage leaders to develop an integrated statewide policy that addresses poverty and provides opportunities for Oregonians.



**Working together to serve individuals, families,
and communities throughout Oregon**



In 2020, every aspect of our work shifted to COVID-19 response, including deploying historic levels of rent assistance, providing guidance and support to Oregon's shelter network, responding to the devastating 2020 Labor Day wildfires, and more. The 2021-23 biennium continued much of this work, and the emergency response grew in 2023 when Gov. Tina Kotek declared homelessness a state of emergency in Oregon and worked with the Legislature to pass a \$155 million Homelessness Emergency Response Package to fund this work. The governor also established a Housing Production Advisory Council (HPAC) to direct and guide the state to reach the annual housing production goal of 36,000 additional homes at all levels of affordability.

It is critical to continue this work to address the longstanding housing crisis in the next biennium. OHCS and our partners are making measurable progress to address homelessness and create housing stability for Oregonians. It took us decades to get to this point; it will take continued coordination and intention to ensure Oregon is a place where affordable, safe housing is a fact of life. Oregon must continue working in partnership – across public and private sectors and across disciplines – to create that future.

Housing Stability Council

Oregon's Housing Stability Council is OHCS' advisory body. The council provides guidance and sets policy for the development and financing of affordable housing throughout Oregon. The council also helps guide and advocate for the agency's work. The members are appointed by the Governor, subject to confirmation by the Senate.

Council Mission: To provide leadership in, and review and set policy for, the development and financing of affordable housing throughout the state of Oregon.



Council Chair
Claire Hall



Councilmember
Erin Meehan



Councilmember
Javier Mena



Councilmember
Kristy Rodriguez



Councilmember
Maggie Harris



Councilmember
Mary Ferrell



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Mary lá



Councilmember
Sharon Nickleberry Rogers, CPA



Councilmember
Sami Jo Difuntorum

Statewide Housing Plan

In 2019, OHCS launched the agency's first five-year [Statewide Housing Plan](#) following extensive listening sessions across the state. The purpose of the plan was to identify areas of critical need and provide a strategic framework for OHCS to inspire coordinated action and build support for addressing Oregon's housing challenges. The plan spanned five years, from July 2019 to July 2024. The achievements represent monumental progress on Oregon's housing front.

The [final report](#) details OHCS' progress in meeting the ambitious goals and strategies set out in the six priorities of the Statewide Housing Plan (SWHP).





Brief, Recent Agency History (2015-2025)

2015-17 Biennium: OHCS focuses on internal operations strategies and begins delivering new programs. During the 2015 session, OHCS sought to modernize the advisory committee structure with HB 2442, which created the Housing Stability Council. Key accomplishments include:

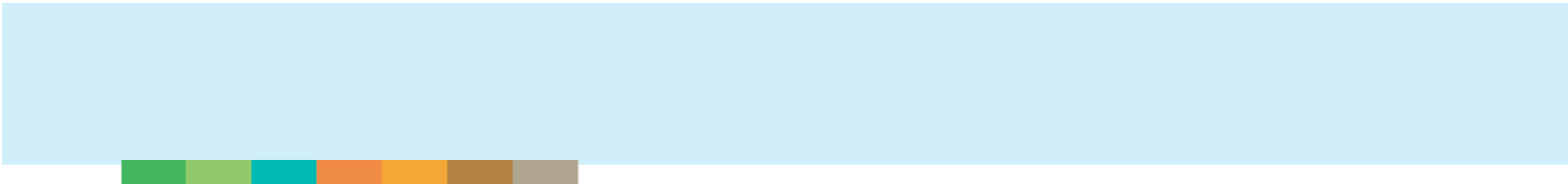
- Improved governance and oversight
- Revenues aligned with expenses and clarity of fiscal position
- Implementation of risk rating system for assets in OHCS portfolio
- Programs streamlined and new programs developed - new programs received in recognition of housing crisis:
 - Local Innovation Fast Track (LIFT) program (\$40 million in XI-Q bond proceeds)
 - Mental Health Housing (\$20 million in lottery bond proceeds), predecessor to Permanent Supportive Housing

OHCS also participated in a Secretary of State Performance Audit. The audit was impactful to the agency's operations, making recommendations that set the stage for our work in later years. Findings include:

- Strategic planning is not sufficient
- Agency efforts to preserve affordable housing fall short
- Better data management needed for informed decision-making
- Organizational challenges impede agency from addressing affordable housing

2017-19 Biennium: A new executive director joins the agency and begins to address audit findings; annual goals focus agency activities while five-year strategic plan is created, and significant budget changes include:

- Expand the Local Innovation and Fast Track (LIFT) program to \$80M in Article XI-Q bonds and add Homeownership Development as eligible use of LIFT funds.
- Homelessness programs receive one-time General Fund investment of \$30M and budget note asking to examine best practices in service delivery, the [budget note report](#) details administrative improvements to Oregon's homeless service system
- Document recording fee tripled from \$30 million/biennium to



\$90 million/biennium, benefiting the Emergency Housing Assistance Program, the Home Ownership Assistance Program, and the General Housing Assistance Program

- \$25 million in Lottery bonds for Preservation of Affordable Housing
- Oregon volunteers and Court Appointed Special Advocate (CASA) programs removed from OHCS
- 19 positions added to deliver new and expanded programs, though OHCS' operating costs remain 1.8%

Other significant budget and workload changes:

- Affordable Housing Development
 - Publicly Supported Housing (PuSH) Preservation program (HB 2002, 2017 and 2019)
 - Land Acquisition Program
 - Federal national Housing Trust Fund
 - Rent-burdened cities and affordable housing cost study (HB 4006, 2018)
- Housing Stabilization
 - Rent Guarantee Program
 - Elderly Rental Assistance Program (from Department of Revenue)
 - State Home Oil Weatherization program (from Department of Energy)
- Lottery funding for veterans (Measure 96)
 - [Operation Welcome Home](#) houses more than 500 Oregon veterans.
 - Regular veterans convenings to bring together community organizations to share best practices and support local coordination
- Launch of [Oregon's Statewide Housing](#), the five-year strategic plan

2019-21 Biennium: Agency continues to grow in size and scale from [increased investments from the Oregon Legislature](#). OHCS also began the implementation

of the Statewide Housing Plan:

- OHCS conducts the [Regional Housing Needs Analysis](#) (HB 2003, 2019), confirming the state's inadequate housing supply is leaving out low-income communities and disproportionately impacting communities of color.
- OHCS restructured and established a deputy director, combining the Chief Operating Office with the Chief Financial Office, and established an Equity, Diversity and Inclusion Office within the Executive Director's Office.
- Affordable Rental Housing
 - LIFT receives \$200 million in Article XI-Q bonds, \$150 million during the 2019 session and \$50 million during August 2020 Special Session.
 - OHCS launches the Permanent Supportive Housing Program in partnership with the Oregon Health Authority, \$50 million in Article XI-Q bonds and \$4.5 million in General Funds.
 - \$25 million in Lottery bonds to preserve affordable homes
 - The division restructured to establish three clear sections: Policy, Production, and Portfolio Management.
- Housing Stabilization
 - The Current Service Level for the Emergency Housing Assistance and the State Homeless Assistance Program are increased to \$50 million. OHCS received \$5 million to increase shelter capacity.
 - OHCS conducted the [Statewide Shelter Study](#) in August 2019, confirming the state has less than half the shelter beds needed to provide warmth and security for Oregonians experiencing homelessness.
- Homeownership
 - OHCS establishes the Homeownership Division.
 - LIFT Homeownership continues.
 - OHCS received \$1.5 million to continue the Oregon Foreclosure Avoidance program.

- Equity and Racial Justice
 - OHCS continued its work toward becoming a culturally responsive organization in many ways in 2020.

- Internally, OHCS hired a Diversity, Equity, and Inclusion officer to lead this work. OHCS stood up internal committees addressing equity in every component of our work. An internal Equity Committee includes OCHS Executive Team and equity leaders within the agency.
- Listening to the call of groups like Reimagine Oregon, OHCS examined our systems and funding structures. For the first time, OHCS made available millions of dollars in homeless services funding to culturally specific organizations (in special COVID Emergency Solutions Grant funding)
- OHCS' Affordable Rental Housing Division took proactive steps to develop more inclusive strategies, such as Minority, Women and Emerging Small Business contracting and created new Tribal set-asides in our 9% Low-Income Federal Tax Credit program.

It's safe to say no one could have predicted the heartache and collective pain of 2020. Answering the call of state and federal leaders, OHCS transformed into a crisis response agency:

- Umatilla Flooding Response – OHCS received \$7.5 million to help Umatilla County, the City of Pendleton, the Confederated Tribes of Umatilla Indian Reservation, and the community at large recover from disastrous flooding.
- COVID-19 Response – more than \$650 million in additional resources (excludes American Rescue Plan Act resources)
 - OHCS, working with the Oregon Health Authority, provides guidance to shelters and affordable housing providers in protecting their clients and supporting vaccine distribution. [OHCS and OHA also partnered to support community-based organizations.](#)
 - OHCS is administering an **additional \$71.7 million in homeless services** from both state and federal sources.
 - OHCS is administering an **additional \$487.5 million in rental assistance** from both state and federal sources. This included three strategies: tenant-based rental assistance, rental assistance for affordable housing residents, and [Landlord Compensation Fund](#).
 - These resources continued into the 2021-23 biennium.
 - OHCS is administering an **additional \$24.5 million in energy assistance.**
 - OHCS [lobbied U.S. Treasury](#) to extend the deadline and allow us to



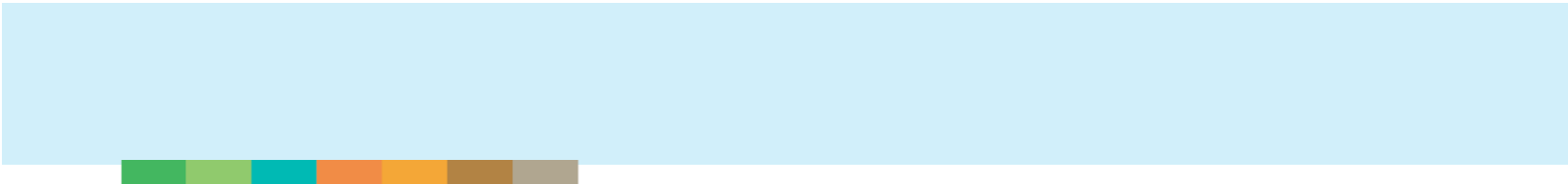
continue to administer the [Oregon Homeownership Stabilization Initiative](#) with the **remaining \$20 million in federal Hardest Hit Funds** from the Great Recession. The program closed March 14.

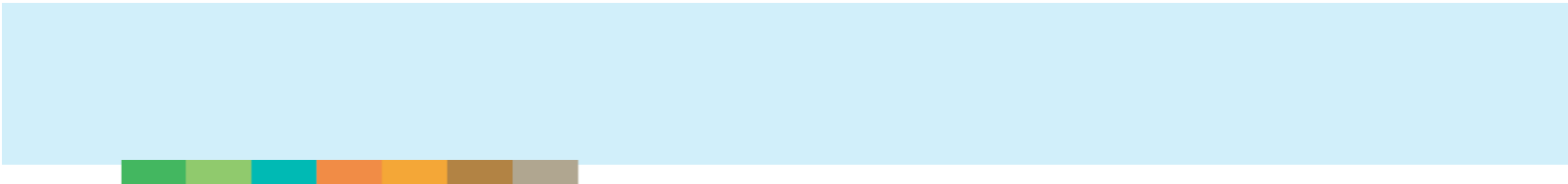
- OHCS partnered with the Oregon Department of Agriculture and the Oregon Water Enhancement Board to administer assistance to Oregon's farmworkers, including housing, transportation, and sanitation
- [OHCS won a national award for our swift response to COVID-19.](#)
- Wildfire Response
 - OHCS chairs the [Oregon Disaster Housing Task Force](#) that is developing Oregon's Disaster Housing Recovery Action Plan, which was completed in Spring 2021.
 - The [Wildfire Damage Housing Relief Program](#) received \$10 million from the Emergency Board to help survivors of the Labor Day wildfires and straight-line winds.

2021-23 Biennium: Once again, OHCS continues to grow in size and scale from increased investments from the Oregon Legislature during the [2021](#) and [2022](#) regular sessions. The Legislature invested more than \$215 million for a rental assistance off-ramp during the December 2022 special session. The 2021-23 biennium represents the largest agency budget in history—for the fourth biennium in a row (see [one-time funds](#) presentation).

- The Legislature made key investments to plug and play resources by expanding existing programs:
 - Increased investment in affordable housing development and preservation programs, nearly doubling LIFT investments;
 - Increased resources for down payment assistance and Individual Development Accounts; and
 - Increased investments to manufactured home programs.

- There were additional investments in new programs and initiatives:
 - Investments of General Fund for homeownership development were made, allowing OHCS to fund models beyond community land trusts and support the development of LIFT Homeownership in

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- rural communities and to the density needed in urban areas;
 - Funds to co-locate affordable housing developments and early learning centers, addressing to intractable issues as every county in Oregon has rent-burdened community members and is some kind of childcare desert;
 - One-time homelessness prevention and service funds;
 - One-time pass-through funds for developments and pilot programs; and
 - The establishment of the Task Force on Homelessness and Racial Disparities ([HB 2100, 2021](#)) to examine the funding mechanisms for Oregon's homeless services system.
 - This biennium, OHCS is also continuing and expanding disaster response efforts:
 - In response to the economic fallout related to COVID-19 response programs, OHCS deployed:
 - The federal Homeownership Assistance Fund and federal counseling resources to help Oregonians keep their homes;
 - Continued deployment of rental assistance, with the Oregon Emergency Rental Assistance (OERAP) becoming the top program in the nation; and
 - December 2021 session resources of \$115 million for rental assistance through OERAP and \$100 million established an off-ramp from OERAP with statewide eviction and homelessness prevention system given waning emergency rental assistance resources.
 - The bulk of wildfire recovery work has begun and OHCS is deploying and launching:
 - \$150 million in state funds allocated to support recovery while Oregon awaited federal funds; and
 - \$420 million in Community Development Block Grant Disaster Recovery resources to support community rebuilding.
 - In addition, the governor has declared a Homelessness State of Emergency via E0 2023-02 with Executive Orders No. 23-03 and 24-04 also related to homeless and housing needs across the state.

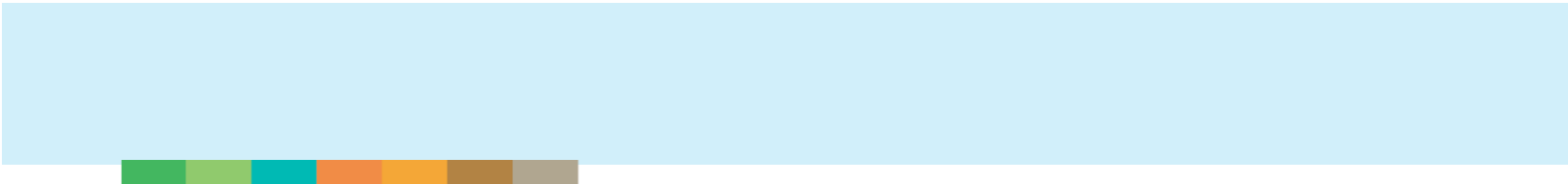


As an agency, OHCS is doubling down on our commitment to meet the people of Oregon's greatest housing needs. To achieve this, OHCS is:

- Accelerating progress through operational excellence, including the establishment of a Project Management Office;
- Advancing equity and racial justice;
- Shifting the business model to respond to emergencies;
- Leveraging our role as a housing finance agency to address the needs outlined in the Oregon Housing Needs Analysis; and
- Authentic power sharing with communities to deploy resources that work for each local community.

2023-25 Biennium: The election of Governor Tina Kotek at the start of the 2023-25 biennium ushered in an increased focus on Oregon's housing crisis. As a result, OHCS again grew in size and scale from increased investments from the Oregon Legislature during the [2023](#) and [2024](#) regular sessions. The 2023-25 biennium represented the largest agency budget in history, with the legislature allocating OHCS \$1.14 billion. In addition, the legislature would allocate \$212 million to address housing and homelessness needs across the state in 2024.

- Funding new and existing programs for the biennium
 - To improve homeownership access and preservation, the legislature funded down payment assistance, new energy-efficient manufactured homes, new mortgage products for low-income individuals, and foreclosure avoidance counseling.
 - To spur construction, the legislature invested in LIFT Rental, LIFT Homeownership, Permanent Supportive Housing, agricultural worker housing, predevelopment, the modular housing industry, preservation, tax credits, and risk mitigation.
 - Legislation also looked to expand OHCS' ability to fund mixed-income developments, expand the Oregon Affordable Housing Tax Credit, and end the sunset for many other tax credit programs.
 - To ramp up the state's emergency homelessness response, the legislature invested in increased shelter capacity, rental assistance, unit access, local service provider staffing, rehousing efforts, homelessness prevention, and the Housing Choice Landlord

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- Guarantee Program.
- This paired with investments to maintain community homelessness resources, including funding for operations, tribes, at-risk youth, and tenant support services.
 - Legislation in this area also created a Task Force on Homelessness and Racial Disparities, OHCS' Cooling Resource Website, and established a whole-home energy savings program in the Department of Energy.
 - March Housing Package
 - Following Executive Order 2023-02 – and its subsequent expansions – which declared a state of emergency due to homelessness in Oregon, investments were made to add shelter beds, hire housing navigators, provide wraparound services, engage in eviction prevention, and support local communities for sanitation service.
 - 2024 Legislative One-Time Funding
 - Additional dollars hit OHCS in 2024 to support existing shelter operations, homelessness prevention, Individual Development Accounts, rehousing, and technical assistance.
 - This session also saw the creation of the Housing Project Revolving Loan program to facilitate the development of moderate-income housing with a \$75.8 million investment.
 - The Statewide Housing Plan
 - In 2019, OHCS launched the agency's first 5-year Strategic Housing Plan, which wrapped in July 2024. The final report in its entirety can be accessed [here](#), and some highlights include:
 - On homelessness, OHCS saw 86% of the households it served stabilized in housing for six months or longer, exceeding its goal.
 - OHCS also funded 1,668 permanent supportive housing units across the state, 668 more than its goal.
 - OHCS built, or has in the pipeline, 28,389 affordable rental homes, exceeding this goal by 3,389.
 - OHCS increased housing development funding in rural areas by 248%, or 5,058 units.
 - Disaster Recovery
 - In 2024, OHCS began the Substantial Action Plan Amendment



process for a \$422 million disaster recovery grant funded by the U.S. Department of Housing and Urban Development.

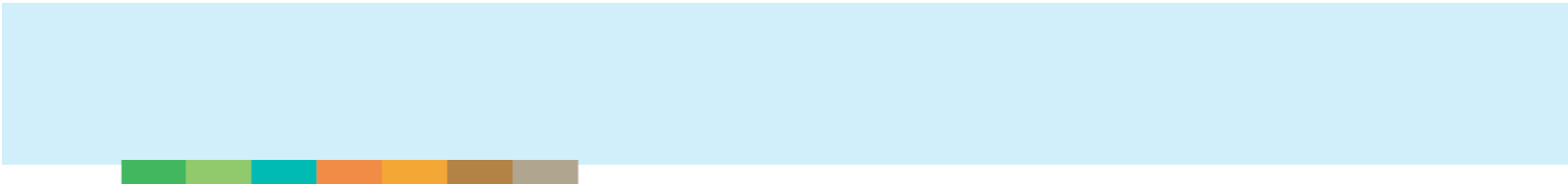
- The amendment created and expanded new and old programs alike that would now aid renters and homeowners with rental and down payment assistance, provide renters and homeowners with counseling services, and add more options for Homeowner Assistance and Reconstruction Program (HARP) applicants.

Budget Landscape

Introduction

Oregon is currently facing an unprecedented housing crisis, with more than half of renters and a third of homeowners burdened by housing costs exceeding 30% of their income. This issue disproportionately impacts low-income households and Black, Indigenous, and People of Color (BIPOC) communities, exacerbated by a decade of rapid population growth, housing underproduction, and the economic fallout from a global pandemic. As home prices continue to outpace wage growth, the dream of homeownership becomes increasingly elusive while rental costs soar, pushing many into financial instability and homelessness. This summary delves into the multifaceted challenges of Oregon's housing market, examining the systemic barriers and economic consequences that demand urgent, equitable, and comprehensive solutions.

An in-depth analysis and additional highlights of the current state of housing in Oregon can be found on the [OHCS website](#). OHCS released its inaugural State of the State's Housing Report in November 2024. Its findings make it clear that OHCS cannot solve the issues facing the people of Oregon on its own. Access to



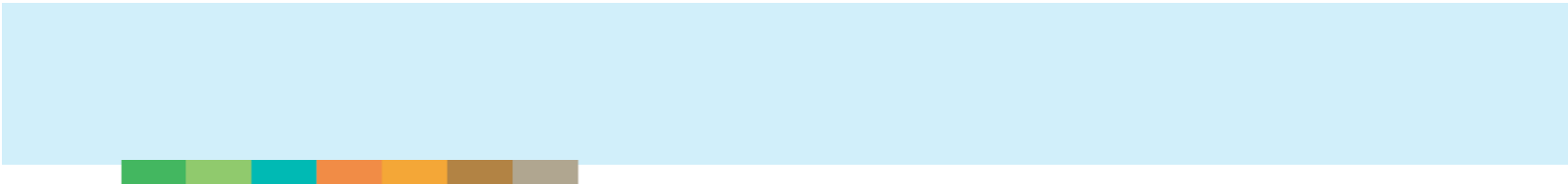
higher education, affordable health care, mental health services, reliable transportation, and strong labor markets depend upon and support housing stability. These areas of investment are mutually reinforcing systems that are intractably linked to one another and pivotal for economic success. Factors beyond housing affect whether people can thrive in today's economy. It will take continued investment in effective solutions from the Legislature and coordination and collaboration between local, state, and federal agencies and partners to ensure housing and economic stability for all Oregonians.

Homeownership

Home prices have far outpaced wage gains over the past decade in the for-sale market, limiting access to the financial security and wealth-building potential of homeownership. While housing was not particularly affordable in 2013, it was more aligned with the economic realities of the time. About 53% of Oregonians had a household income that qualified them to purchase the average home. Since then, wage growth has lagged, and only 29% of households could afford a typical home in 2023. This decrease is primarily because, for every dollar Oregonians earned in wage increases between 2013 and 2022, the median sales price of a home increased by \$7.10, further distancing homeownership from reach.

Depending on interest rates and personal debt, individuals can typically afford homes priced three to five times their household—price increases beyond this range negatively impact affordability. While low interest rates in 2021 and early 2022 softened some effects of rising housing costs, as rates have increased, affordability has deteriorated, and housing market activity has slowed. BIPOC communities, which have historically been excluded from homeownership, continue to face significantly lower homeownership rates (49%) compared to their white counterparts (66%).

While purchasing a home is challenging for anyone, certain communities bear the brunt of these economic consequences. This is partly because the housing crisis began much earlier for BIPOC populations, who generally have lower household incomes and face systemic hurdles when attempting to purchase a



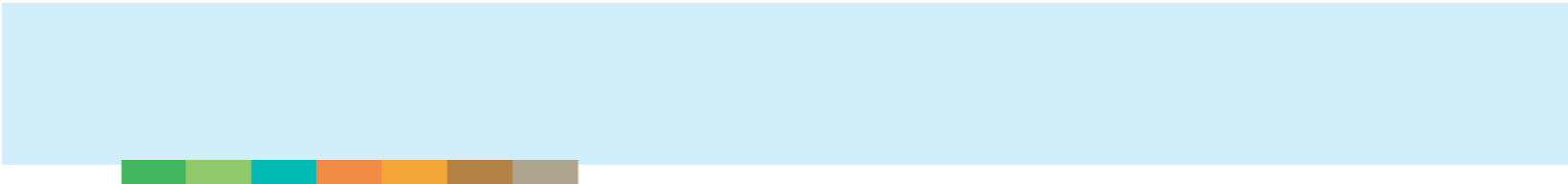
home. By 2018, the average home was already unaffordable for every demographic group in Oregon except white and Asian individuals, and the situation has since worsened as the gap between wages and housing prices has widened. Although the overall homeownership gap between white and BIPOC Oregonians remained relatively stable from 2013 to 2022, it expanded explicitly for Black and Native American groups during this period.

Rental Housing, Middle-Income Households, and Labor Market Risk

Similar to for-sale markets, people in the rental market face severe challenges as income and housing costs drift further apart. Despite rebounds in residential construction, building permits, and a slowdown of in-migration trends, housing production remains well below what is needed to address the shortfall. Rent was stable going into 2020 but began to climb sharply alongside for-sale prices during the summer and has not returned to pre-pandemic levels. Rapid rent increases have largely eroded the wage gains Oregon renters experienced over the last five years, with more than 50 cents of every new dollar earned going to rent hikes. Rising housing costs pose significant consequences for labor markets, particularly moving forward.

More than half of all renters in Oregon experience a housing cost burden, meaning that they spend more than 30% of their income on housing costs. Neighbors, friends, and families struggle to make ends meet each month as rent payments come due. The lack of affordable housing isn't a new issue, particularly for households on low incomes and BIPOC Oregonians. However, the past decade has been marked by rapid population growth and housing underproduction, exacerbated by a global pandemic that caused housing prices to skyrocket, deepening the housing crisis.

One of Oregon's strongest economic advantages has been its ability to attract a talented and highly educated workforce, but this is at risk. A lack of affordable rentals, let alone for-sale homes, creates a high barrier to entry, especially as remote work becomes more common. Employers may struggle to find



employees, particularly since 13 of the top 20 fastest-growing occupations have average wages insufficient to afford a one-bedroom apartment in Oregon. With homeownership out of reach and rent prices climbing, Oregonians face financial precarity, eviction, and, ultimately, homelessness.

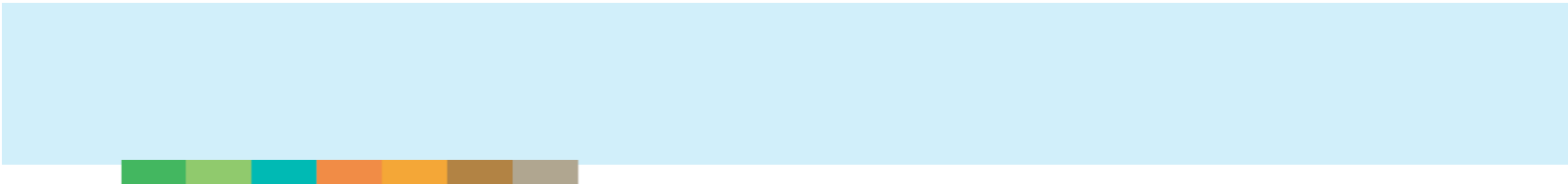
The renter cost burden has increased by 11% between 2019 and 2022, representing tens of thousands of new households struggling to keep up. This increase predominately affects households making between \$45,000 and \$75,000, whose representation among cost-burdened renters grew from just 18% in 2001 to 44% in 2022. Additionally, more than 27% of all renters are severely cost-burdened, meaning they spend 50% or more of their income on housing.

Evictions, Foreclosures, and Homelessness

Unsurprisingly, foreclosures and eviction cases have rebounded to pre-pandemic levels since COVID-era protections ended. In fact, the number of eviction cases filed in 2023 was the highest Oregon has seen since 2011, following the exit from the Great Recession. The shortage of affordable housing and increasing cost burden have resulted in a rising number of people without a safe place to call home. When adjusted for population size, Oregon ranks third in the nation for people experiencing homelessness, behind only New York and Vermont. As of 2023, more than 20,000 individuals were experiencing homelessness, with 3 in 10 classified as chronically homeless.

In other words, almost 48 out of every 1,000 Oregonians are experiencing homelessness, compared to 46.5 in California and 36 in Washington. Notably, Oregon ranks first in the nation for unsheltered homelessness among families with children, with the number of children experiencing unsheltered homelessness in the state being 14 times higher than the national average and almost three times higher than Hawaii, the second-highest state.

Oregon has made significant progress in supporting individuals experiencing homelessness. Initiatives such as Executive Order 23-02 have rapidly mobilized resources to increase the number of available shelter beds, facilitate the transition of unsheltered individuals to permanent housing, and work to prevent



homelessness and evictions through rental assistance. Additionally, the state has invested in permanent supportive housing, which provides wraparound support services and long-term rent assistance for those struggling with chronic homelessness. While public institutions and nonprofit organizations have demonstrated that viable policy options exist to address homelessness, continued investment is needed.

Oregon's profound housing crisis demands immediate and collaborative action. The stark realities of cost-burdened renters and homeowners, combined with alarming rates of homelessness, highlight the urgent need for comprehensive, sustainable solutions. The OHCS presentation aims to clarify that persistent housing challenges exist across the state, underscoring the need for ongoing investment in the full spectrum of housing services. Addressing these issues is crucial for Oregonians' economic stability and social well-being and essential for maintaining the state's ability to attract and retain a skilled workforce. As Oregon navigates these complex challenges, it must prioritize equitable strategies that consider the unique barriers faced by BIPOC communities and other vulnerable populations, ensuring an inclusive path forward.

Looking Ahead

Budget Drivers

- Rising inflation, labor and construction costs put pressure on development budgets
- Oregon cannot lose ground on State Funded Shelter and Unsheltered Homelessness systems of care
- Oregon needs balanced investments in new affordable construction and preservation
- As the proportion of OHCS's General Fund to overall budget grows, rebalancing overhead costs is needed to comply with federal cost principles

Budget Risks

- Repeated "one-time" investments are stretching capacity of existing staff, from a leadership, program delivery and operational support perspective
- Uncertainty of federal funds could limit impact of state investments

- Insurance cost and availability, particularly for organizations/buildings serving the Oregon's most vulnerable populations, become prohibitive

Strategic Operations Planning

OHCS' role has evolved significantly over the past five years to transform into an agency that improves Oregonians' daily lives by advancing a broad housing-based agenda. There is now wider recognition that housing and housing stability are core determinants of health and prosperity. The agency aspires to provide greater support and impact across the broader continuum of care. OHCS has also taken on a leadership role in statewide initiatives and policy-setting, as evidenced by Executive Orders 24-02 (Homelessness) and 23-04 (Housing Production).

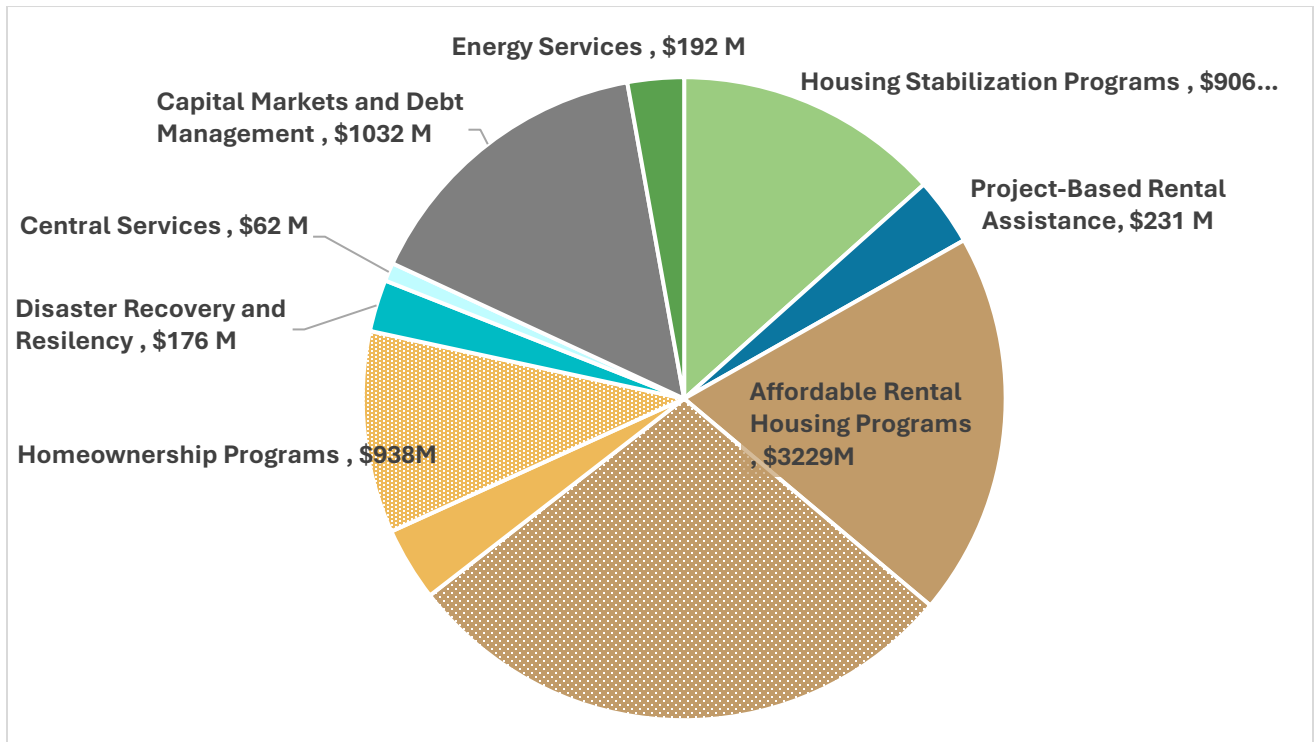
This evolution has resulted in substantial changes to the agency's size, structure, and services. OHCS has grown into a medium-sized agency entrusted with addressing Oregon's cornerstone issues. This requires OHCS to evolve into a "government 2.0" model, breaking free from outdated ways of operating to effectively solve today's problems while preparing for future challenges. As a result, OHCS is breaking down improvement initiatives into manageable, easily implementable units of work, setting an internal tone that reflects the agency's commitment to Oregonians.

OHCS engaged consultants to develop a comprehensive strategic plan focused on enhancing internal operations. This initiative aligns with the governor's mandate for state agencies to create strategic plans that drive operational improvements and modernization efforts and will help OHCS to reach programmatic goals set by forthcoming updates to the Statewide Housing Plan.

Key insights from the initial analyses revealed OHCS' unique position in addressing Oregon's housing challenges. The agency's strengths lie in its dedicated staff, diverse funding sources, and strong partnerships. However, it faces challenges such as staffing constraints, complex regulations, and

increasing housing demands. Opportunities for improvement include enhancing operational efficiency, leveraging technology, and strengthening community engagement. Potential threats involve economic uncertainties, political shifts, and evolving housing market dynamics.

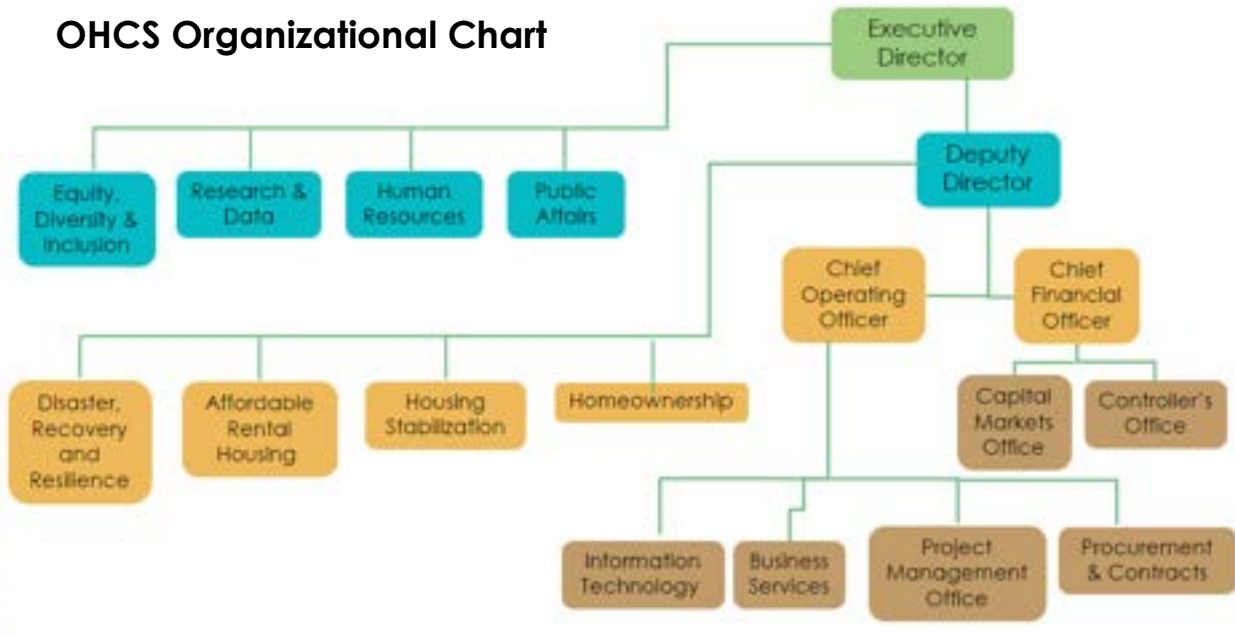
Agency Budget



Governor's Recommended Budget [Link](#)

Staffing and Organizational Structure

OHCS Organizational Chart



Agency Staffing

Since July 1, 2023, OHCS welcomed 191 new staff, including:

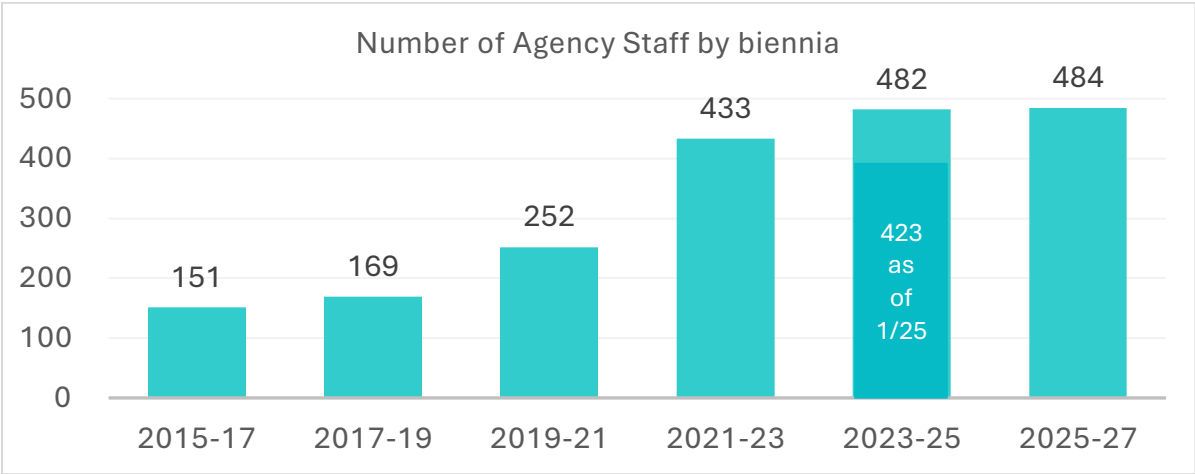
- 121 new to state service
- 70 transfers from other agencies

172 staff members advanced into new roles:

- 127 promotions
- 45 lateral moves, including limited duration and temporary assignments

Combined, these efforts filled 259 permanent and 59 limited-duration positions. Since July 1, 2023, OHCS has experienced 39 separations, primarily due to resignations for private sector opportunities or retirement.

- Current vacancies (as of Jan. 1, 2025):
 - 117 total (40 limited duration, 77 permanent)
 - 43 have been vacant for 6+ months
 - 24 have been vacant for 12+ months
- Vacancy rates by position type:
 - Permanent: 18%
 - Limited duration: 9%

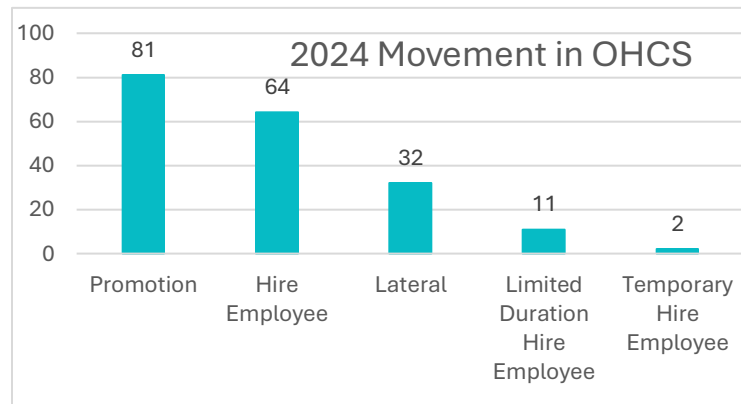


Hiring Challenges and Agency Interventions

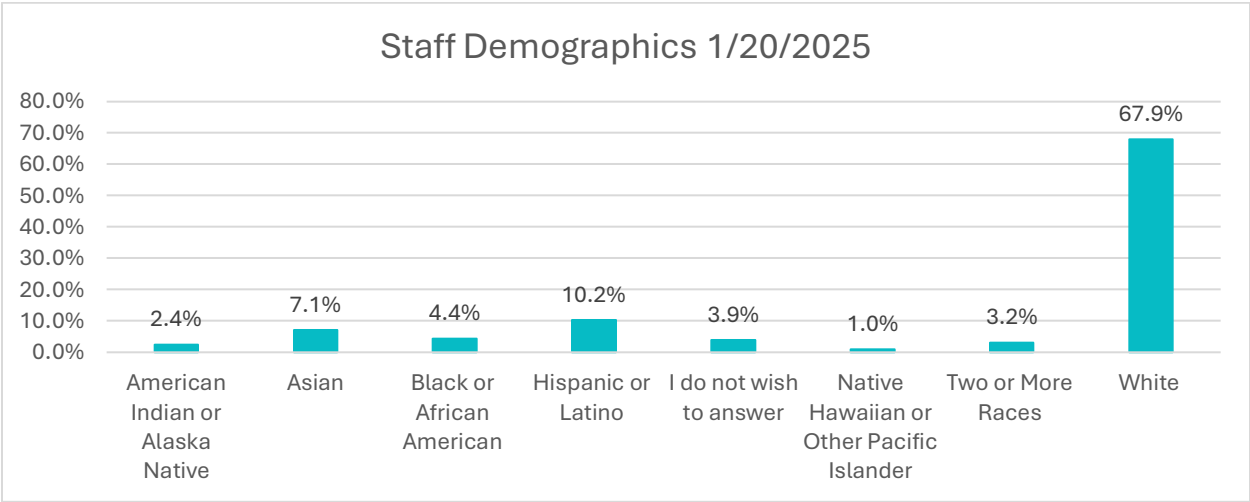
Mandated requirements for position approvals, organizational restructuring, and classification changes create delays, at times making it difficult to write comprehensive position descriptions that address the roles, needs, and expanded responsibilities. Yet, over the last two years, enhanced workflows,

data-sharing, and strong DAS partnerships have resulted in 130 classification approvals.

This biennium, OHCS has seen over 170 promotions and transfers, reflecting strong career development. However, this movement requires backfilling critical roles while simultaneously meeting new program demands. Leadership has balanced recruitment growth while increasing retention efforts. Turnover rates have dropped from 16.7% in 2022 to 12.8% in 2024, improving workforce stability by 23.35%.



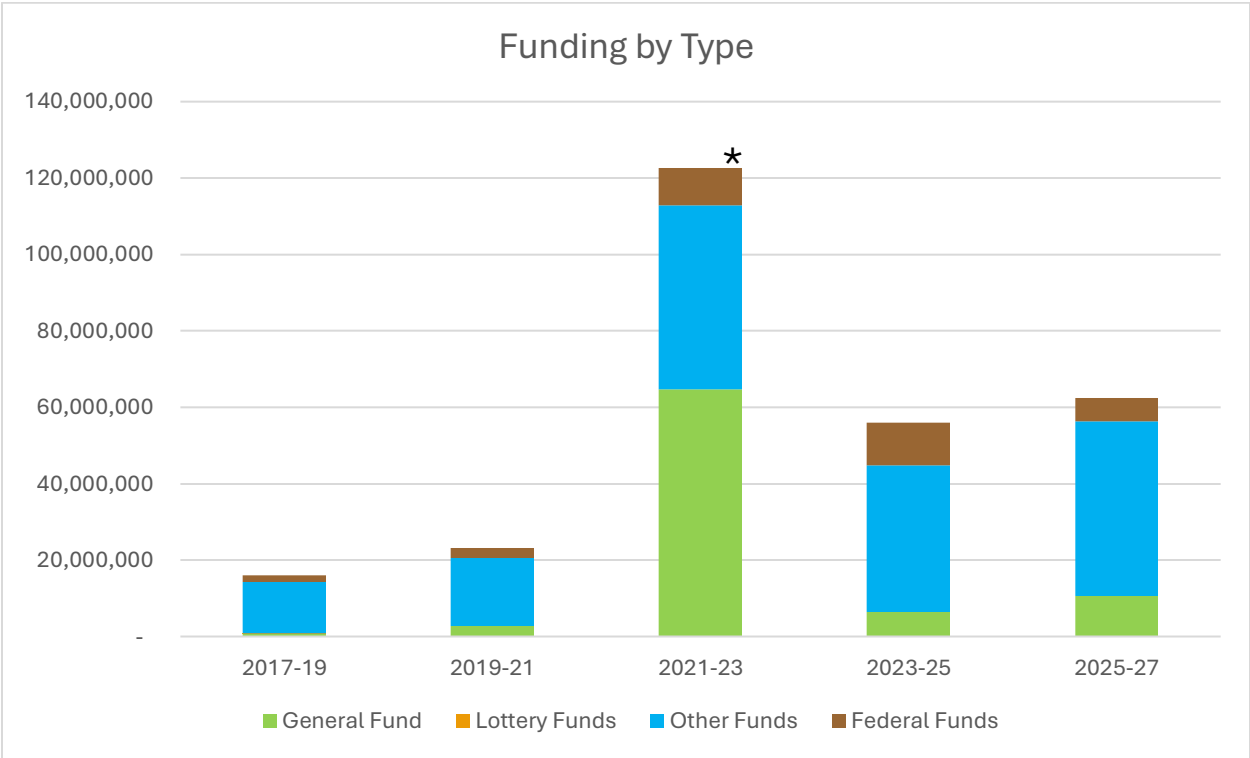
Positions in Governor's Budget	Supervisory	Non-supervisory	Total
Central Services	22	145	167
Affordable Rental Housing Division	22	149	171
Disaster Recovery and Resilience	6	36	42
Homeownership Division	5	31	36
Housing Stabilization	10	63	73
Total	48	378	426



Central Services Division

Budget area includes:

- Director's Office
 - Human Resources
 - Public Affairs
 - Research and Data
 - Equity, Diversity, and Inclusion
- Deputy Director's Office
 - Chief Operating Officer
 - Information Technology
 - Business Services
 - Project Management Office
 - Chief Financial Officer
 - Capital Markets Office
 - Controller's Office



* Disaster Recovery and Resilience (DRR) funds were originally allocated to Central Services' budget, causing the large increase seen in the 2021-23 biennium. Once DRR became fully operationalized, their funding was separated from Central Services' budget and sent directly to the division.

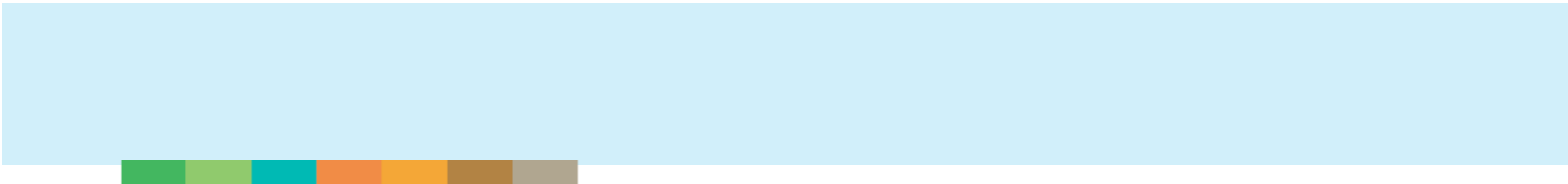
Policy Option Packages:

Policy Option Package 90:

Makes the following adjustments to support OHCS' work: eliminates \$337,910 GF for Housing Choice Landlord Guarantee, allocates \$3,500,000 GF for behavioral health housing supports to comply with Mink-Bowman order, increased \$1,000,000 for assistance for Homeownership Centers, eliminates two positions Shifts four positions and the related services & supplies from GF to OF, increases Vacancy saving by 2%, and eliminates inflation on certain services & supplies accounts

GF \$2.1M | LF \$0 | OF \$0.9M | FF \$0 | Pos. -1.5, FTE -1

Policy Option Package 508: Operational Supports



Establishes 16 essential positions in ARH, HSD, and agency leadership, restores 24 positions authorized by the governor's EO on Homelessness, and re-establishes three limited-duration positions to support agricultural worker and modular housing legislation.

GF \$10M | LF \$0 | OF \$2.5M | FF \$0.7M | Pos. 42.74, FTE 46

Policy Option Package 509: IT Support

Establishes two positions to support modernization of systems such as grant management and provide service desk support, and supports continued investment in data systems in response to a Secretary of State audit finding to reduce use of ad hoc data tracking tools and custom systems that use aging architecture.

GF \$0.3M | LF \$0 | OF \$1.7M | FF \$0.04M | Pos. 1.76, FTE 2

Policy Option Package 510: Disaster Recovery & Resilience Limitation

Funds staffing necessary to launch the remaining programs outlined in the ReOregon Action Plan.

GF \$0 | LF \$0 | OF \$7.3 | FF \$163M | Pos. 29, FTE 29

Policy Option Package 511: Homeowner Assistance Fund

Continues four Homeowner Assistance Fund positions to help close the existing federal program. Steps needed to close the program include confirming and reconciling application of all payments, completing a final data compilation, submitting a close out request to U.S. Treasury, closing out all grants and agreements with partners, vendors, and servicers, and preparing all files for monitoring, potential audits, and eventual archival.

GF \$0 | LF \$0 | OF \$0 | FF \$7.8M | Pos. 5, FTE 5

Programmatic Divisions

OHCS has four programmatic divisions to expand housing solutions across the continuum and prepare and recover from natural disasters. The divisions are:

1. Affordable Rental Housing Division
2. Homeownership Division
3. Housing Stabilization Division
4. Disaster Recovery and Resilience Division

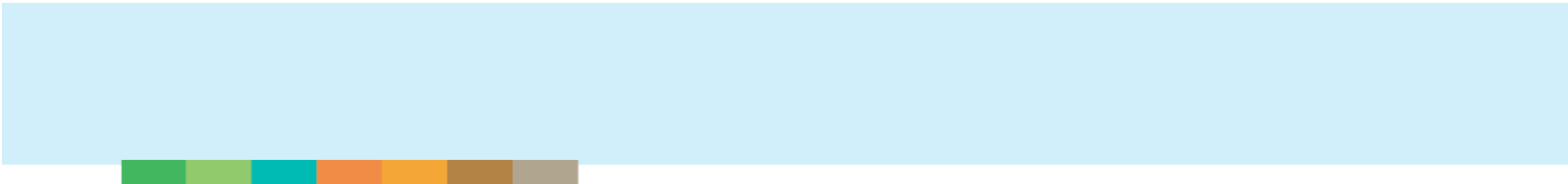
OREGON HOUSING AND COMMUNITY SERVICES CONTINUUM



Affordable Rental Housing Division

The Affordable Rental Housing Division programs provide partial financing for developing or preserving affordable rental housing and ensure that the units meet physical and financial standards. These programs include:

- Affordable Rental Housing Development Programs** finance the development of multifamily properties that offer Oregon's workforce, seniors, and families a safe, stable, and affordable place to call home. Federal and state-funded programs provide financing for the development of new homes, rehabilitation of existing properties, preservation of publicly supported housing, and preserving manufactured dwelling parks. Technical advisors, the application team, and production analysts work with specific development teams to bring project concepts forward and through the financing and development process.

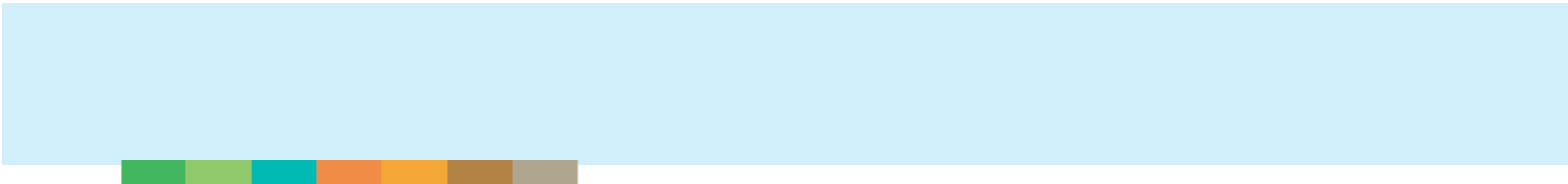
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- **Asset Management and Compliance Monitoring** of projects that have received OHCS funding ensure that the projects meet the regulatory requirements of the various funding sources. Many properties are physically inspected on a regular basis, and a review of management is conducted to ensure compliance with regulatory standards, federal regulations, and state rules. The projects' financial statements are reviewed annually to ensure the fiscal viability of the project.

The federal [9% and 4% Low-Income Housing Tax Credit \(LIHTC\) program](#) provides tax credits for developers to construct, rehabilitate, preserve, or acquire and rehabilitate qualified low-income rental housing. OHCS reserves and allocates 9% and 4% tax credits on eligible properties.

The [Conduit](#) Bond Program provides additional flexibility by using tax-exempt bond financing (by allocating the state's private activity bond volume cap). Experienced affordable housing development teams maximize control by selecting the financing team and negotiating financing terms.

The [General Housing Assistance Program \(GHAP\)](#) expands the state's housing supply for low and very low-income Oregonians. Within this program are mandated carve-outs that must be used for capacity building (8% of funds) and the development of veterans housing (25% of funds). It is funded through the state's document recording fee.

The [Agriculture Workforce Housing Tax Credit \(AWHTC\)](#) program is designed to give a state income tax credit to investors who incur costs to construct, install, acquire, or rehabilitate agriculture workforce housing. This tax credit is used both for on-farm housing and community-based housing for farmworkers.



[Permanent Supportive Housing \(PSH\)](#) program utilizes Article XI-Q funds for the development of deeply affordable housing paired with on-site comprehensive services designed to best support households experiencing chronic homelessness throughout Oregon. In addition to PSH development capital, OHCS offers funding for comprehensive, on-site tenancy support services and project-based rental assistance. A wide body of evidence supports using the PSH model to achieve better outcomes for people and lower costs across systems, including health care, criminal justice, and emergency services.

The [Local Innovation and Fast Track \(LIFT\) Rental Housing Program](#)'s objective is to build new affordable housing for low-income households, particularly families. The primary goals of the LIFT Rental program are to create a large number of new affordable housing units to serve low-income Oregonian families and historically underserved communities, such as rural communities and communities of color.

The [Oregon Affordable Housing Tax Credit \(OAHTC\) Program](#) provides a state income tax credit for affordable housing loans for which a lender reduces the interest rate by up to 4%. For new construction developments, applications must demonstrate a 20-year term that the benefit of the tax credit will be entirely passed on to reduce tenants' rents.

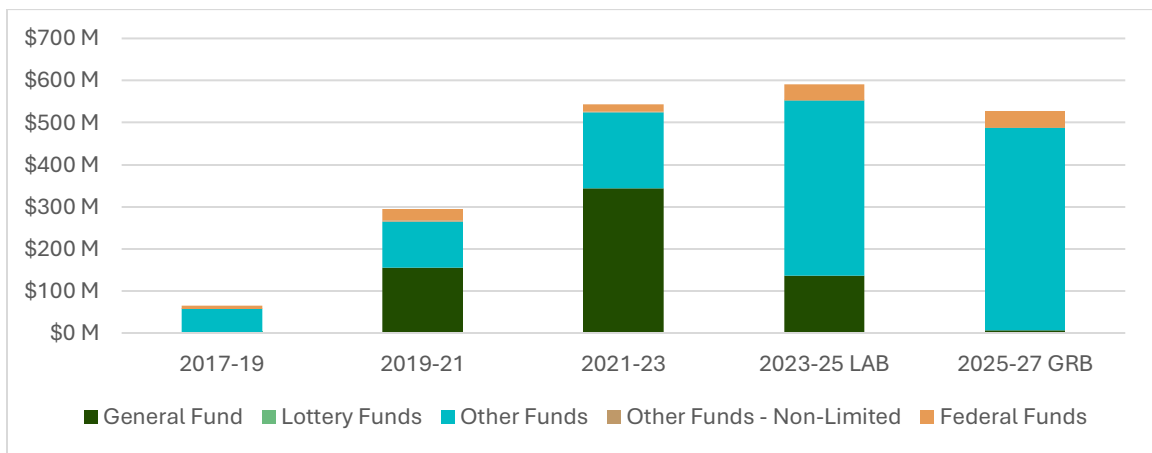
The [Predevelopment Loan Program \(PDLP\) and the Feasibility Loan Program \(PFLP\)](#) are designed to assist with the costs of low-income housing projects prior to financial closing and final commitment of capital funding resources through the ORCA process.

The [Land Acquisition Revolving Loan Program \(LAP\)](#) assists eligible organizations in Oregon to purchase land suited for affordable housing development. Land purchased through this program must have affordable housing built on it within eight years of acquiring the loan.

The [HOME Investment Partnerships Program](#) provides federal funds for the development of affordable housing for low- and very low-income households, and encourages partnerships among state agencies, local governments, nonprofits, and for-profit organizations.

The [National Housing Trust Fund \(HTF\)](#) is a federal formula grant program administered by states that is intended to increase and preserve the supply of decent, safe, sanitary, and affordable housing, primarily rental housing, for extremely low-income and very low-income households. HTF resources are generally paired with Permanent Supportive Housing (PSH) capital resources (see above) for the development of PSH units. For some projects, HTF may also be awarded as a loan rather than a grant.

Multifamily Rental Housing Funding Authority by Fund Type



Project-Based Rent Assistance Programs

The Project-Based Rent Assistance programs provide state and federal rent subsidies for low-income tenants of specific units. The state-funded Permanent Supportive Housing program, or PSH, was initiated in the 2019-21 biennium. This budget unit is new in the 2023-25 biennium and is intended to make a distinction between these programs and the tenant-based rent assistance in the Housing Stabilization Division. These programs include:

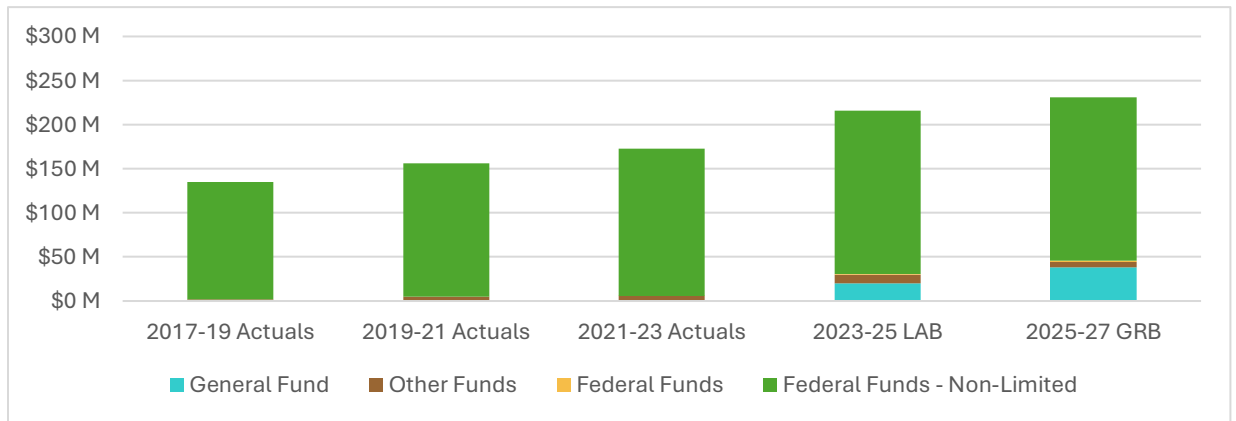
The [HUD Project-Based Rental Assistance Program](#) provides rent subsidy payments paid directly to property owners. These subsidies ensure that tenants pay no more than 30% of their income for rent. Contract administration of these programs includes contract renewals, rent adjustments, tenant complaint resolution, and on-site monitoring of owner policies, procedures, and practices, as well as follow-up on physical inspection findings.

The [Section 811 Project Rental Assistance \(PRA\) Program](#) provides project-based rental assistance to persons on extremely low incomes with mental, intellectual

and/or developmental disabilities, and allows them to live in the community as independently as possible by increasing the supply of rental housing linked with support services.

Permanent Supportive Housing (PSH) Rental Assistance combines lease-based, affordable housing with tenancy supports and other voluntary services to help individuals with high needs, including persons with disabilities and persons coming out of chronic homelessness, achieve stable housing and recovery in their communities.

Project-based Rental Assistance Budget Authority by Fund Type



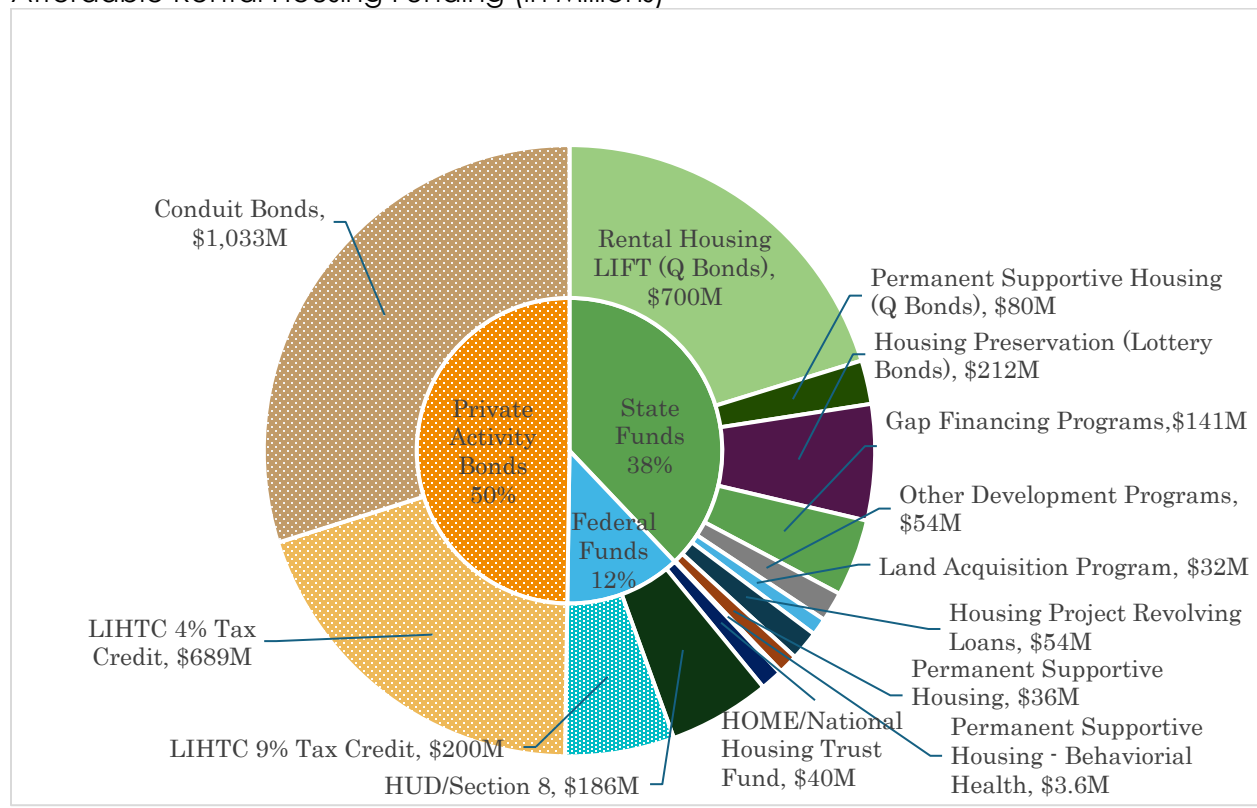
ORCA and Project Pipeline

In 2024, OHCS overhauled and implemented an entirely new funding process in an effort to improve how affordable housing is financed in the state, including more rapidly get resources in the hands of developers. The Policy Option Packages presented in the Governor's Request Budget are primarily in service of taking advantage of this new process to fund as many of the existing projects in OHCS' development pipeline that are ready to proceed as soon as funding becomes available for them. At the time of this presentation being put together, OHCS had over 90 development projects either already approved through the initial step in the application and on a waitlist or actively completing that initial step in the ORCA process.

OHCS also has a suite of programs to assist projects that require more early support to reach the readiness standard required in the ORCA, and between those programs and the active ORCA pipeline, plus both our new Applications

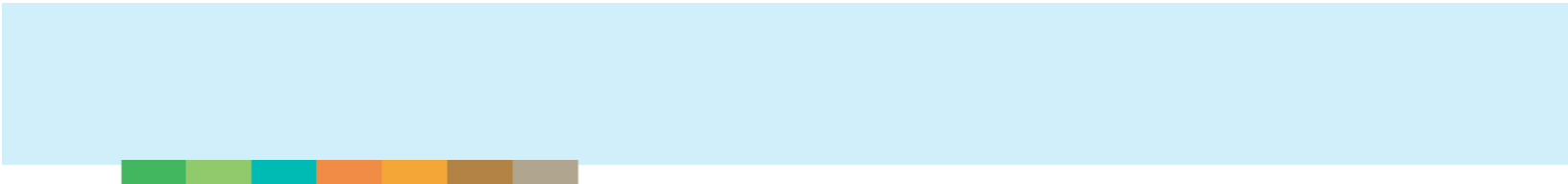
Team and Technical Advisor Team, OHCS is actively working to help continue to grow project opportunities across the state for all different tenant populations beyond the already demonstrated list of those ready to move right now. Over 100 projects have already submitted their initial intake forms indicating that they have a project concept that they hope to move into an application phase when ready.

Affordable Rental Housing Funding (in Millions)



Policy Option Packages:

Policy Option Package 513: Permanent Supportive Housing (PSH) Current Service Level Program Improvement



This package addresses the complex needs of people experiencing chronic homelessness by proposing an increase to the rental assistance and services funding components of the PSH program in OHCS' Affordable Rental Housing Division (ARH). The PSH program provides capital funding for development of permanent housing along with long term project-based rental assistance and supportive services for tenants, which enables housing providers to serve Oregonians with histories of long-term homelessness and disabling conditions effectively. This complex bundling of resources has proven to be effective and should continue to be delivered through a coordinated process at OHCS.

This package prioritizes the improvement of the PSH program by addressing an outstanding need of OHCS-funded PSH projects: insufficient resources for PSH-level services and operations costs. The package proposes to increase the amount of rent assistance and services funding a PSH project can utilize in order to ensure that levels of funding are appropriate to project need.

GF \$8.6M | LF \$0 | OF \$0 | FF \$0 | Pos. 0, FTE 0

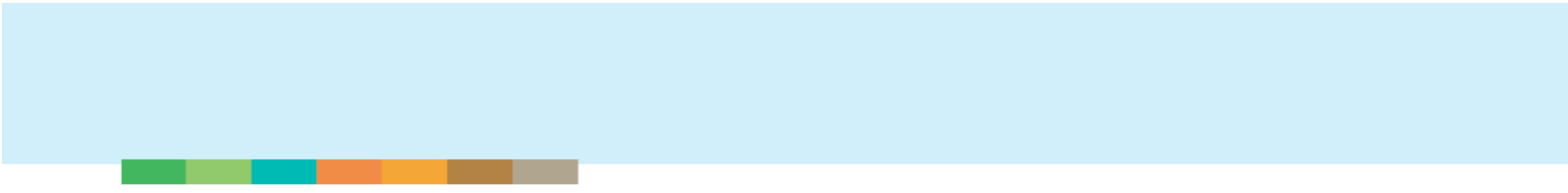
Policy Option Package 515: Rental Development LIFT & PSH

This package proposes to continue funding the development of affordable rental housing and permanent supportive housing through Article XI-Q bond investment. The agency requests \$780M total Article XI-Q bonds, of which \$700M will be allocated to the Local Innovation and Fast Track (LIFT) program for affordable rental housing development, of which \$80M will be used for development funding through the PSH program. These investments will come from the General Fund for debt service of Article XI-Q bonds.

GF \$36.7M | LF \$0 | OF \$5,420,000 | FF \$0 | CC \$780M | Pos. 0, FTE 0.0

Policy Option Package 516: PSH Expansion for Rent Assistance & Services

This package proposes an expansion of the Permanent Supportive Housing (PSH) program rent assistance and services funding components by adding 400 more slots to the PSH program's current resources.



GF \$2.5M | LF \$0 | OF \$0 | FF \$0 | Pos. 0, FTE 0

Policy Option Package 519: Preservation Expiring Properties Plus Physical and Financial Needs

The state is experiencing a housing crisis and has mobilized historic levels of state resources to address the profound, ongoing need for affordable rental housing. As we continue developing new affordable housing at an unprecedented pace, it is essential and cost effective to ensure we preserve and maintain the current affordable housing stock.

Preserving existing rent-restricted housing that is affordable and well-maintained over the long term is as important as building new affordable housing. This package request proposes an increase to the state's investment in preservation of affordable housing to better meet the scale of current preservation needs, keeping thousands of rental housing units affordable and well maintained for decades to come.

GF \$0 | LF \$4.9M | OF \$161.4M | FF \$0 | Pos. 0, FTE 0.0

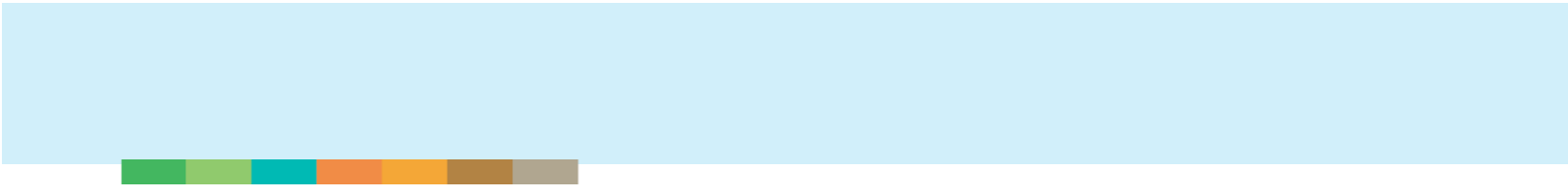
Policy Option Package 520: Preservation of Manufactured Home Parks

Manufactured home parks are an important source of naturally occurring affordable housing and need to be preserved wherever possible. OHCS provides resources to manufactured parks at risk of loss. This funding source would be exclusive to this mission and OHCS would work with a third party to support efforts to purchase parks through a mission-based nonprofit or a resident cooperative.

GF \$1.2M | LF \$0 | OF \$25M | FF \$0 | Pos. 0, FTE 0.0

Policy Option Package 530: Culturally Responsive Property Management

This request is for grant resources to better meet the needs of Oregonians by fostering the growth and availability of Culturally Responsive Property Management for affordable rental housing properties. The property



management industry has navigated significant challenges in recent years with capacity and resources for supporting tenants. The industry needs specific and deliberate investment to build and support long term expansion in alignment with the governor's production goals established in Executive Order 23-04. It is also critical that this expansion is done in a way that will center tenants and ensure responsive and supportive affordable rental housing developments that will reduce tenant eviction and displacement.

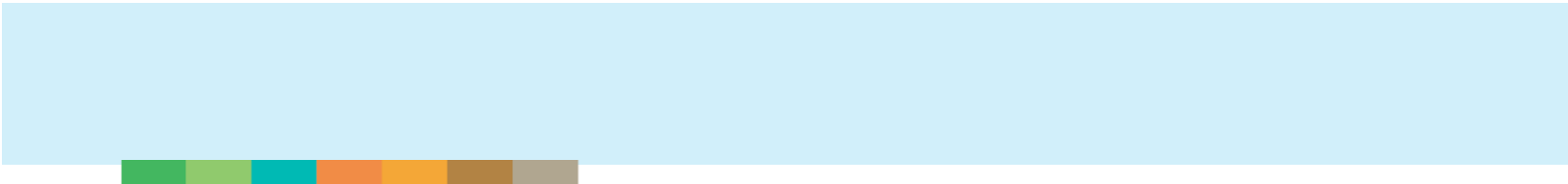
GF \$3M | LF \$0 | OF \$0 | FF \$0 | Pos. 0, FTE 0.0

Disaster Recovery and Resilience

2020 Labor Day Disasters

The unprecedented 2020 wildfire season worsened the ongoing housing crisis for many communities in Oregon. The Federal Emergency Management Agency (FEMA) declared a disaster in eight counties, where over 5,000 homes were destroyed: Clackamas, Douglas, Jackson, Klamath, Lane, Lincoln, Linn, and Marion. Almost half of the destroyed housing was manufactured or mobile homes, located in manufactured home parks. Many of the former residents of the manufactured home parks are on low incomes, and losing this naturally occurring affordable housing is difficult to replace. Three publicly supported buildings with 127 units, 83 of which were rent-restricted, were destroyed as well.

Oregon Housing and Community Services (OHCS) is responsible to implement State Recovery Function 5 – Disaster Housing as outlined in the Oregon Disaster Recovery Plan (2018). Yet, the already short supply of affordable housing across the state creates an incredibly difficult situation for over 1,400 people who may not qualify for FEMA assistance and cannot find other options. HUD is working with OHCS on a Housing Impact Assessment to quantify and describe the full impact of the fires within the landscape of pre-existing housing need. Meanwhile, the shelter system, already at reduced capacity and increased demand because of COVID, is scrambling to bring temporary relief to many of the wildfire survivors who were hardest hit.



The Emergency Board funded the Oregon Wildfire Damage Housing Relief (OWDHR) Program with \$10 million to support low-income renters and homeowners with cash assistance of up to \$7,000. As of May 4, 2021, the program's last payment date, OWDHR has helped 1,017 households with over \$7.1 million in assistance.

State Wildfire Recovery Resources

During the 2021 session, the Oregon Legislature allocated \$151 million, as part of House Bill 5006, to OHCS to assist fire survivors and their communities with recovery from the 2020 Labor Day Disasters. The appropriation included \$100.4 million of General Fund and \$50.8 million of Lottery-backed bond revenues. All \$151 million had been allocated and/or obligated as of February 2025.

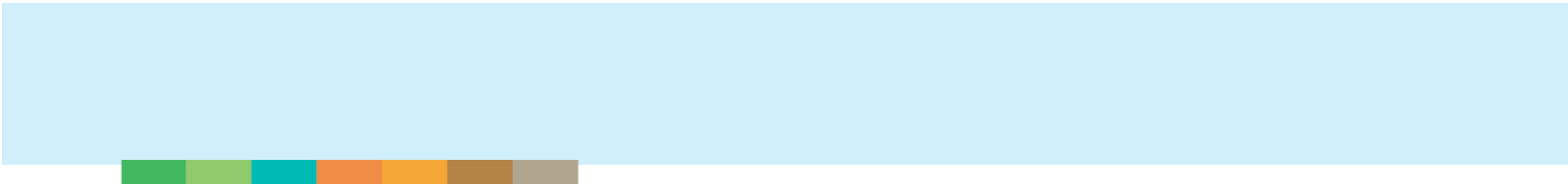
Wildfire Recovery and Resilience Accounts (WRRRA): These funds are used by community action agencies and others to assist wildfire survivors directly. Roughly a third of the funding was used for rent and assistance with temporary housing while the rest was used for repair or replacement of permanent housing. Over 1,100 households have been assisted with intermediate or permanent housing solutions.

County Flexible Suballocations: Eligible uses of these funds include land acquisition, infrastructure, and recovery operations staffing. As long as projects met the eligible-use criteria, the OHCS Disaster Recovery and Resilience (DRR) team empowered counties to identify and prioritize their greatest needs. The targets for suballocations were: \$5M for Lane County, \$2M for Lincoln County, and \$12.1M for Marion County (based on proportion of housing lost and funding commitments already made). Jackson County project commitments were already in line with geographic targets and thus did not receive a suballocation.

Intergovernmental agreements were effective Nov. 1, 2022, with each county. To date, the agreements have funded home repair and construction for families impacted by the fire, land acquisition and preparation for affordable housing, critical water and sewer infrastructure, and resiliency enhancements to utilities.

Community Development Block Grant Disaster Recovery (CDBG-DR)

DRR performance in the 2025-27 biennium will consist primarily of activities

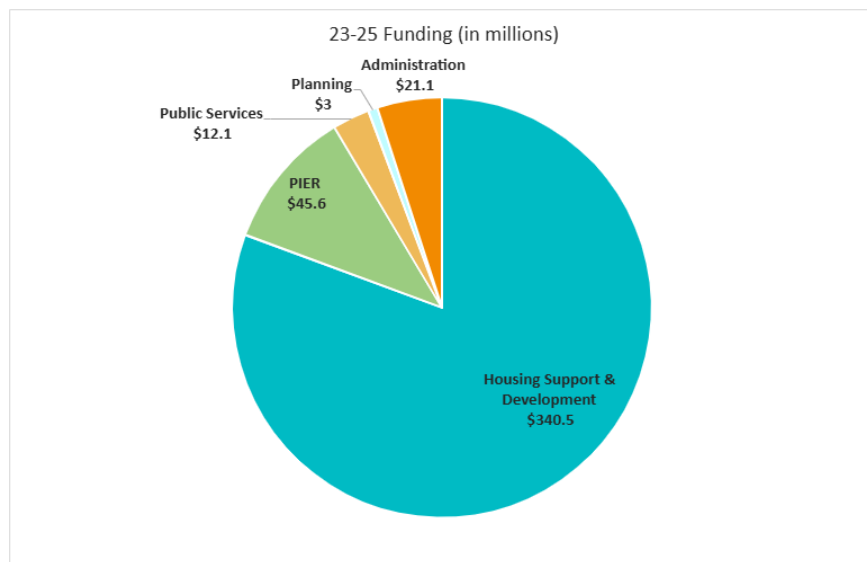


related to the CDBG-DR Action Plan, branded and marketed as the ReOregon program. These efforts will support recovery from the 2020 Labor Day wildfires and straight-line winds and mitigation actions in Clackamas, Douglas, Jackson, Klamath, Lane, Lincoln, Linn, and Marion counties.

The goal of CDBG-DR is that all fire-impacted individuals and households have equitable access to the resources necessary to be housed safely, sustainably, permanently, affordably and in their housing of choice. The ReOregon housing programs—the final few of which are estimated to become available during the 2025-27 biennium—provide resources to help wildfire survivors who have not yet been able to rebuild or return to safe, affordable homes.

The Action Plan was drafted with an explicit concern for—and implementation is guided by—the particular needs of Latino/a/x residents, residents on low incomes, and individuals living with disabilities who have been disproportionately impacted by this disaster and face hurdles in recovery. OHCS has partnered with culturally specific and community-based organizations to support survivors through application and recovery processes.

The core elements of the plan, which were refined through extensive public engagement in fire-impacted areas in May 2022, are described below. No less than 15% of program funds must be spent on mitigation activities, including building homes that are resistant to fires and other natural disasters. The total amount listed is the program budget for the life of the grant, which can be up to six years.



Homeowner Assistance and Reconstruction Program (HARP) (\$165.6M): A housing replacement program for homeowners who lost homes to the fires. The program provides funds for homeowners to purchase a move-in ready home, replace manufactured housing on owned or leased sites, repair manufactured housing or site-/stick-built homes, and/or reconstruct site-/stick-built homes. As of Feb. 21, 2025, there are 286 total applicants with 5 awards completed and another 22 in progress.

The program was expanded through a Substantial Action Plan Amendment, which was approved by HUD on Jan. 10, 2025, to include a reimbursement path for survivors who have completed their reconstruction. DRR is awaiting approval of a waiver submitted to HUD to expand the timeline for which eligible expenses can be reimbursed. If approved, program can reimburse up to \$100,000 for eligible expenses for applicants who earn less than 120% of area median income who paid for repair, reconstruction, or replacement costs prior to applying or prior to Jan. 10, 2025, whichever is sooner.

Additionally, it's important to note that through the Substantial Action Plan Amendment process, the overall allocation of CBDG-DR funds to HARP have been reduced compared to last biennium to add funds to the new Affordable Housing Development program.

Affordable Housing Development (AHD) (\$127.3M): County-, or their designee, administered program that supports local recovery by providing funds for homeownership opportunities, rental housing development, and/or infrastructure projects that lead to the development of affordable housing. As of February 2025, the program is online and subrecipient agreements are out for signature. This program was a redesign of the Homeownership Opportunities Program (HOP) at the request of impacted counties and partners. That feedback led the agency to expand the eligible activities under HOP to include affordable rental housing development and infrastructure, in addition to homeownership. The program was renamed Affordable Housing Development to better reflect the updated eligible activities.

Counties	Allocated
Clackamas	\$7,747,747
Douglas	\$3,275,868
Jackson	\$61,591,276
Klamath	\$827,848
Lane	\$17,483,497
Lincoln	\$9,774,119
Linn	\$4,574,481
Marion	\$18,354,528
County Total	\$123,629,364
Reserved for OHCS	\$3,719,217
Program Total	\$127,348,581

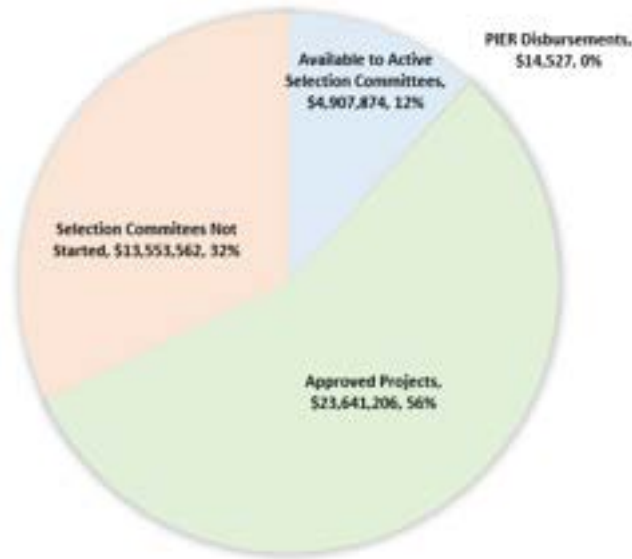
Housing Support Services (\$47.6M): A renter-support program providing funds for Intermediate Housing Assistance (IHA) rental support (\$22.6M), Down Payment Assistance (DPA) (\$22M), and Housing Counseling (HC) (\$3M). IHA provides up to 24 months of rental assistance for income-eligible households. It is currently operating as a rollover from an earlier emergency rental assistance program and will begin expanding operations during the second quarter of 2025. DPA and HC are both, similarly, looking to come online during Q3 2025. DPA was originally incorporated under the umbrella of HOP, but with the creation of the Affordable Housing Development program and rebranding of HOP, it has moved under the Housing Support Services program.

Planning, Infrastructure, and Economic Revitalization (PIER) program (\$45.6M):

PIER is a fund to support local priority projects to build new infrastructure, carry out mitigation or planning activities to prepare for future disasters, and support economic revitalization. OHCS, with input from the impacted counties, suballocates PIER funding by county. Local governments and other key recovery stakeholders (such as long-term recovery groups and economic development districts) form regional committees to select and prioritize projects to receive these funds. As of Feb. 15, 2025, of the 15 total projects, five are active with executed subrecipient agreements, nine are approved by OHCS with subrecipient agreements pending, and one is pending a final budget estimate. Finally, of the \$42.1M allocated, \$23.6M (56.1%) has been obligated to fund the approved projects, and disbursements began mid-February 2025.

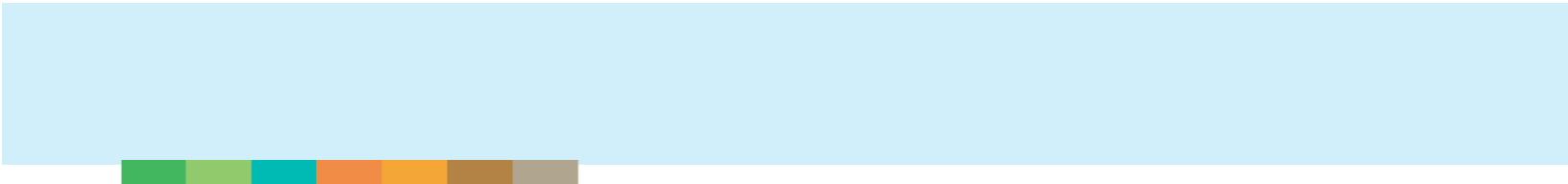
County	Allocated	Approved Projects
Clackamas	\$2,415,826	\$0
Douglas	\$2,399,446	\$1,012,776
Jackson	\$13,849,117	\$11,349,117
Klamath	\$1,703,097	\$1,071,121
Lane	\$7,926,980	\$7,549,567
Lincoln	\$2,684,967	\$2,658,625
Marion/Linn	\$11,137,736	\$0
Total	\$42,117,169	\$23,641,206

PIER FEBRUARY 2025



Public Services (\$12.03M): Includes Legal Services (\$6.017M) for homeowners and renters affected by the fires as well as a Housing Recovery Services program (\$6.017M), which provides funding for disaster case management and housing navigation support to assist impacted residents, vulnerable populations, and members of underserved communities to expedite their recovery. The Legal Services program is currently under development and disaster case management activities under the Housing Recovery Services program began with the execution of an agreement with the Oregon Department of Human Services in July 2023.

Resilience Planning (\$3M): A statewide initiative aimed at strengthening



Oregon's disaster resilience through coordinated planning, strategic investments, and cross-agency collaboration. Led by the Governor's Office in partnership with state agencies, the program seeks to develop an actionable resilience framework that integrates local, state, and federal efforts. The plan will assess Oregon's disaster risks, research and incorporate housing resilience needs and action items, identify gaps in current resilience programs, and establish measurable resilience goals. This may include developing affordable housing construction standards, engaging in public land use and infrastructure policy and planning, aiding in public resilience and preparedness policy and planning, protecting public health, and spurring economic growth.

Homeownership Division

Homeownership Division programs seek to increase the supply of affordable homes for purchase across the state, as well as support Oregonians on low and moderate incomes to become homeowners and build stability and equity in their homes. Sections of this division include:

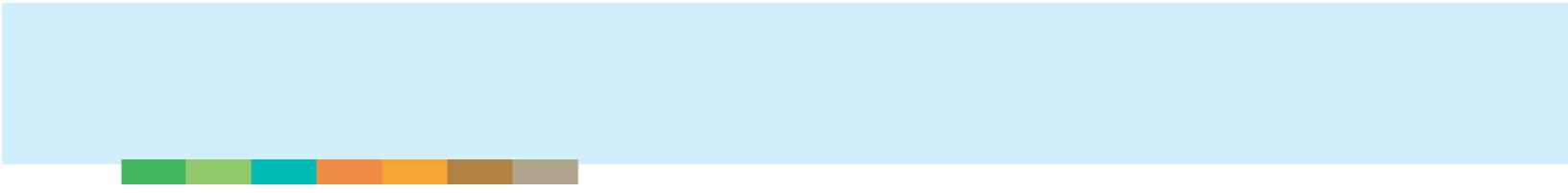
Homeownership Programs

The Homeownership Programs Section provides funding through the Home Ownership Assistance Program (HOAP) to support community-based nonprofits, including a network of homeownership centers across Oregon, to offer direct services and resources to homebuyers and homeowners that include but are not limited to financial counseling, first-time homebuyer education, down payment assistance, and foreclosure counseling for families with low to moderate incomes.

Additionally, by providing funding to developers, the Homeownership Programs Section expands the supply of new and diverse types of affordable homes for purchase that are aligned with community needs.

Homeownership Lending

The Homeownership Lending Section facilitates financing through the development, implementation, and oversight of mortgage lending programs and products to assist Oregon homebuyers of low to moderate incomes. Programs offered through this section include the Oregon Bond Residential Loan Program and the Flex Lending Program, which pairs down payment assistance (DPA) through its two products: FirstHome and NextStep. All mortgage lending



programs and products are provided through approved and trained mortgage lenders. Leveraging both mortgage revenue bonds and mortgage-backed security markets allows OHCS to better respond to Oregonians' needs and assist more Oregonians in achieving the dream of homeownership than ever before.

Manufactured Housing

The Manufactured Housing Section expands housing options by preserving and improving manufactured home parks, providing affordable gap financing to replace aging and inefficient manufactured homes, and collaborating with stakeholders to develop policies and resources that support manufactured housing residents. To further support manufactured home and marina communities, the Manufactured Home and Marinas Communities Resource Center (MMCRC) monitors manufactured home park and marina state registry compliance, manages state Community Resource Dispute and Resolution grants and provides mediation services to resolve disputes between park owners and tenants outside of court.

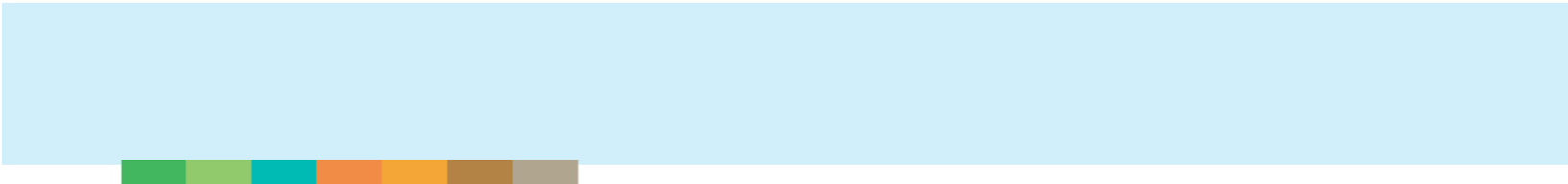
Homeowner Assistance Programs Section

The Homeowner Assistance Programs Section primarily supports homeowners through the Homeowner Assistance Fund (HAF). HAF is a federally funded program that replaced OHCS' former mortgage assistance program (Oregon Homeownership Stabilization Initiative) in 2022. HAF preserves homeownership, preventing foreclosures and potential homelessness, by curing delinquent mortgages, property taxes, homeowner or condo association fees, and manufactured home lot rent; assisting with future payments; and connecting struggling homeowners to housing counselors and legal aid services. HAF is closed to new applications. OHCS will make final HAF payments in February 2025 and then wind down except for a five-year lien management period.

PROGRAMS

Homeownership Division programs provide a diverse array of tools to increase supply, support homebuyers, and help homeowners maintain their homes and build equity.

Increasing the supply of affordable homes for purchase:

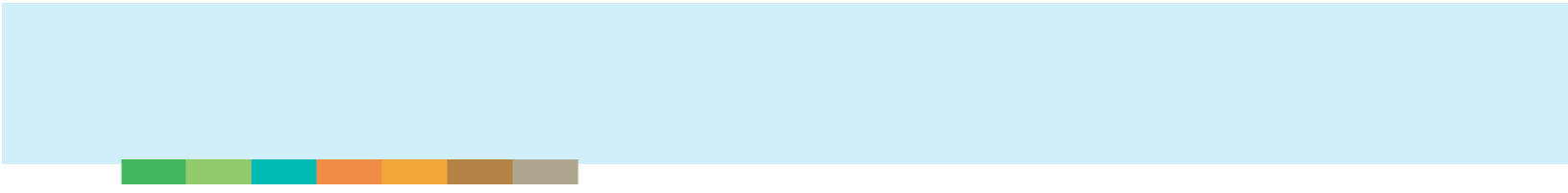


The Local Innovation and Fast Track (LIFT) Housing Program uses Article XI-Q bonds to fund the development of affordable homes for Oregonians on lower incomes. The program supports new construction or conversion of existing non-housing structures, and projects must use a shared equity model of homeownership (such as a community land trust, condo, or cooperative) that leads to long-term affordability. OHCS convened a LIFT Workgroup in 2024 that included OHCS and DOJ staff and program stakeholders. These efforts led to substantive program updates meant to better support rural projects and projects that spur density. With these changes and the growth of the network and capacity of homeownership developers, OHCS expects funds to be oversubscribed.

- **Outcomes:** Since program inception in 2017, \$110M in LIFT funds have supported the development of 62 projects leading to the creation of nearly 1,000 new homes that will be permanently affordable to households with incomes at or below 80% of area median income (AMI). Of those homes, 221 are complete and home to about 530 people.

The Homeownership Development Incubator Program (HDIP) supports the construction of new affordable homes for low- to moderate-income families by providing pivotal pre-development and capacity-building support, as well as development subsidies for community-centered homeownership projects. HDIP has a specific set-aside for Tribal development projects and can support homes affordable up to 120% of AMI. HDIP was launched in 2023 and is funded by General Funds.

- **Outcomes:** Since 2023, \$14.3M in HDIP supported eight projects to build 84 homes affordable to households at or below 120% of AMI. Two of the projects were on Tribal land. Ten of these homes are complete. \$27.5M was paired with LIFT to support rural and dense development while program improvements were underway, enabling more rural and dense projects to access LIFT.



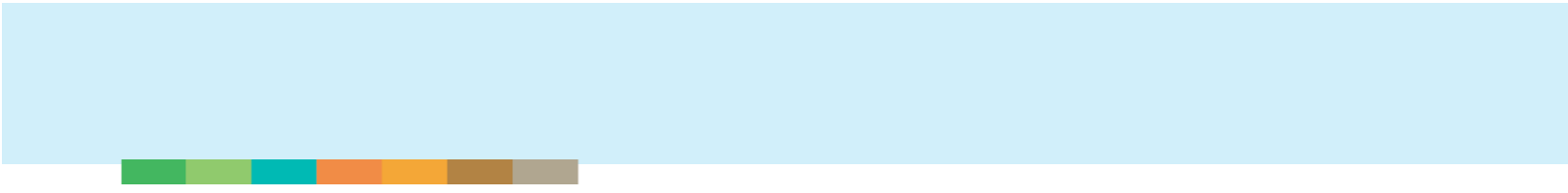
Homeownership Centers: OHCS supports a network of 15 homeownership centers, including five that are culturally specific, that cover every county in the state. Homeownership centers provide financial and homebuyer education, pre- and post-purchase counseling, and resources to navigate the homebuying process. Homebuyers can meet one-on-one with certified housing counselors and have access to resources such as matched-savings accounts and down payment assistance. Homeownership centers often also offer support for homeowners such as home repair grants and foreclosure counseling. Homeownership center funding typically comes from document recording fee revenue as part of the Home Ownership Assistance Program (HOAP).

- **Outcomes:** From June 31, 2022-June 31, 2024, homeownership centers served over 6,000 new clients. Clients attended nearly 11,000 education sessions and over 3,700 counseling sessions. The average income of new clients was just over \$41,000 and 48% of clients identified as people of color.

Down Payment Assistance (DPA) funds deployed by community-based organizations are awarded to organizations throughout the state to create, continue, and expand their down payment assistance programs. DPA is available to first-time and first-generation homebuyers with an income at or below 100% of AMI. Homebuyers may qualify for up to 20% of the home purchase price in down payment and/or closing cost assistance. This DPA can be stacked with other down payment sources. The DPA is structured as a grant or five-year forgivable loan (depending on the amount and sources). To receive the DPA, homebuyers must complete Homebuyer Education and from a qualified organization.

- **Outcomes:** From March 2023 to June 2024, 21 organizations provided over \$12M in DPA to 348 first-time and first-generation homebuyers, 59% of whom identify as people of color. The average DPA per homebuyer was just under \$37,000.

Mortgage Products



[The Oregon Bond Residential Loan \(OBRL\) program](#), launched in the late 1970s, has helped thousands of Oregon homebuyers with below-market interest rates through approved and trained lenders for lower-income first-time Oregon homebuyers.

In March 2023, OHCS' Homeownership Lending section launched [Flex Lending](#). The loan product, NextStep, brings low-rate first mortgages paired with DPA directly through approved and trained lenders. All first-time homebuyers must complete and present proof of homebuyer education through an OHCS-approved source such as homeownership centers.

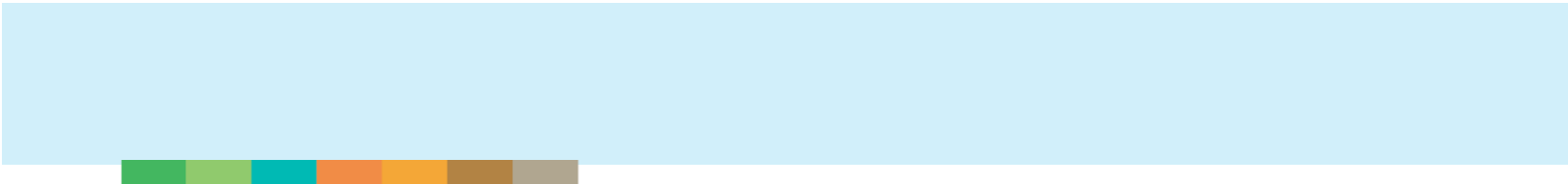
In November 2024, the Flex Lending program released FirstHome, a complementary product to NextStep. FirstHome is a below-market interest rate bond-based lending program for first-time Oregon homebuyers on lower incomes that may be coupled with down payment assistance. OHCS was provided Down Payment Assistance (DPA) from General Funds to couple with OHCS lending programs to establish a renewable source of DPA.

- **Outcomes:** In calendar year 2024, Homeownership Lending helped 592 families realize the dream of homeownership, of which 193 received DPA totaling \$2,629,805.

[Racial Disparities in Homeownership Grant Program](#): OHCS awards funding to community-based organizations and local governments that offer homeownership services to expand outreach and offer language access services. The program seeks to remove some of the barriers to homeownership that people with limited English proficiency and other historically underserved communities face.

- **Outcomes:** During the first two biennia of operations, the program provided 23 grants averaging \$62,000 to community-based organizations across the state including developers, education and counseling agencies, and dispute resolution centers. These funds have increased the visibility and access to services and the participation of limited language speakers through interpretation and translated program materials.

Supporting Homeowners



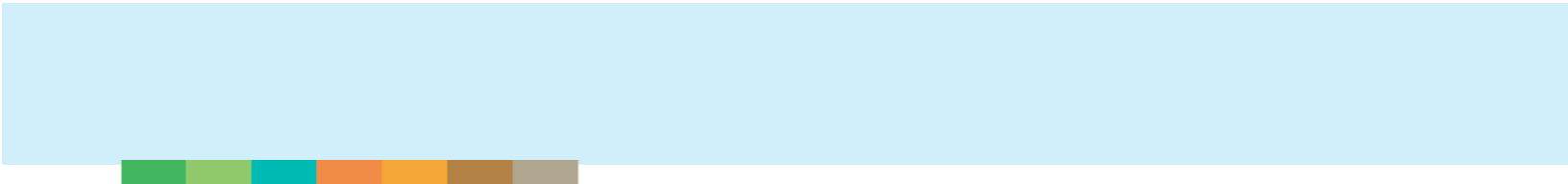
Foreclosure Avoidance Counseling: OHCS funds 16 community-based organizations with certified foreclosure counselors who are paid a fee for service when they meet with homeowners at risk of losing their home. Having a counselor to navigate a scary and stressful process, explain bank and legal jargon, help homeowners avoid scams and understand their rights makes the difference between staying in one's home or losing it forever. Foreclosure is costly and disruptive for families, lenders, and communities. Foreclosure counseling is a proven, structured, and low-cost intervention that can help struggling homeowners avert the grave impact of foreclosure on their housing, economic, and mental health, and get back on track with their mortgage payments.

- **Outcomes:** Foreclosure counselors have historically supported about 500 clients per year. Of those clients an estimated 98% have averted foreclosure.

The Homeownership Assistance Fund is a federally funded program that helps homeowners who are in a difficult financial situation due to the coronavirus pandemic. As part of the American Rescue Plan Act of 2021, Oregon received \$90M to help eligible homeowners avoid mortgage foreclosures, delinquencies, defaults, and displacements. OHCS reduced application barriers for recipients of government benefits, rural homeowners, bankruptcy debtors, divorced non-owners, and domestic violence victims. OHCS expanded coverage from a predecessor program to include repurchasing county foreclosed properties and helping manufactured home owners who rent space in parks.

- **Outcomes:** HAF helped 2,485 Oregon homeowners stay in their homes with an average award of \$26,635. OHCS worked with servicers to monitor or postpone nearly 800 foreclosures, some with only a few days' notice, preventing 560 foreclosure sales by reinstating accounts.

The Manufactured Home & Marina Communities Resource Center (MMCRC)

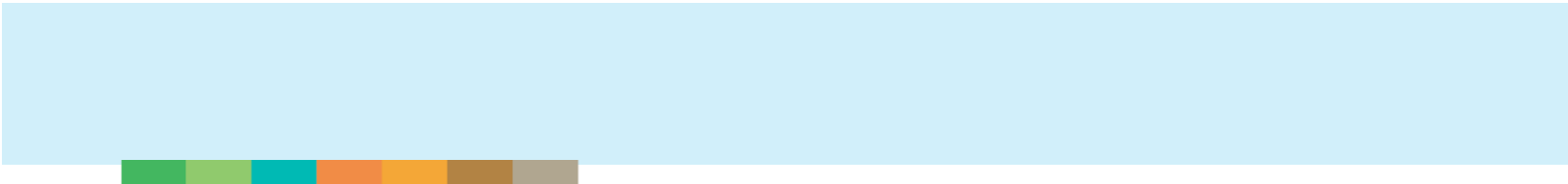


provides services and information to residents and landlords of manufactured home parks and marina communities. MMCRC promotes cooperative community relationships and positive alternatives to the court through dispute resolution services. Each biennium, MMCRC provides \$212,000 in grants to 12 Community Dispute Resolution Centers for manufactured home mediation services and \$200,000 for legal aid services for manufactured homeowners with low to moderate incomes.

- **Outcomes:** On average MMCRC centers hold 60 dispute sessions throughout the year, helping about 200 clients. Historically, 53% of disputes resulted in complete agreement and 19% in a partial agreement.

The [Manufactured Home Replacement Program](#) provides loans to individuals to replace older energy-inefficient homes because it is cheaper and better for the environment than to repair them. It is estimated that over half the manufactured housing inventory in Oregon was built before 1976, the year that the U.S. Department of Housing and Urban Development (HUD) began regulating manufactured home construction standards. Additionally, another 25% were built before 1995, the year that HUD implemented energy standards to their building standards.

- **Outcomes:** Since 2019, the Manufactured Home Replacement Program has replaced 53 older and energy-inefficient homes, including those in wildfire areas, helping homeowners avoid homelessness and stay in their homes. Of the manufactured home replacement recipients, 45% are in cooperatively owned or nonprofit owned parks, 35% are persons over the age of 60, 15% identify as people of color, 11% are veterans, and 75% are households with incomes at or below 50% of AMI.

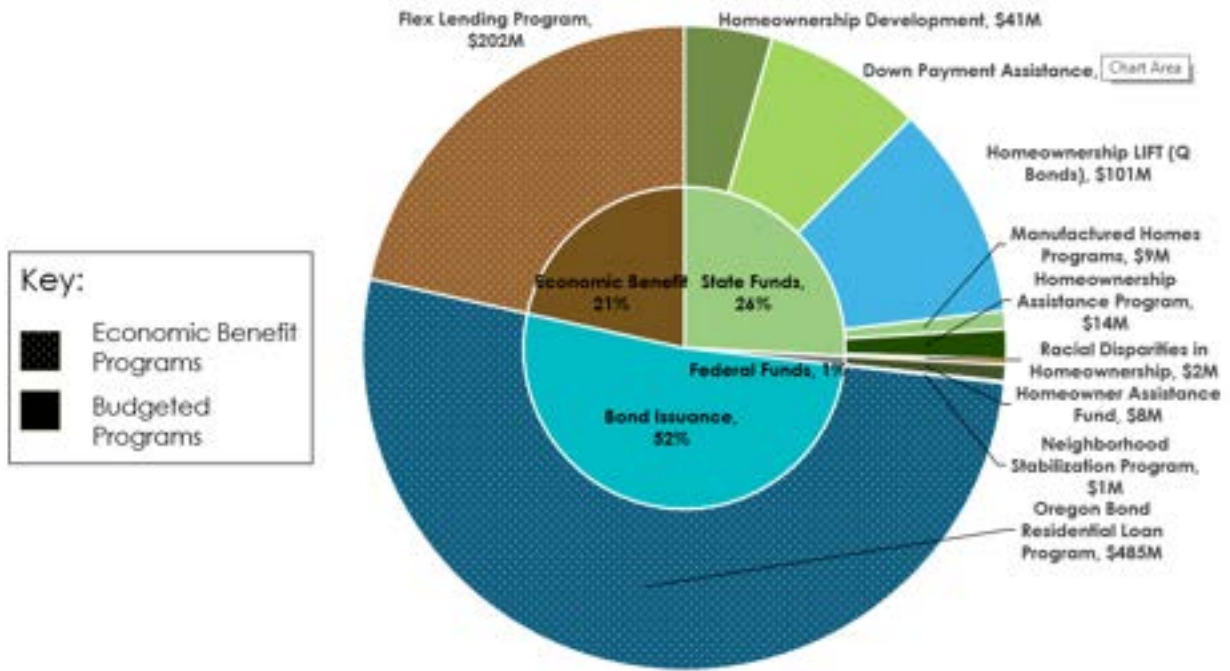


Restore Health and Safety provides financial assistance to homeowners to repair and modify their homes for better health and safety. OHCS awards the Restore Health and Safety funds to qualified nonprofits with the capacity to do homeowner intake and certification (or partnerships) of home repair inspections. Homeowners with incomes at or below 100% of area median income can qualify for assistance to complete repairs that affect the house structure and/or repairs that are not limited to accessibility/adaptability modifications, updates to code compliance, emergency repairs, and repairs for structural integrity. Restore Health and Safety funding typically comes from document recording fee revenue as part of the Home Ownership Assistance Program (HOAP). By statute, 25% of the funds from HOAP go to veterans.

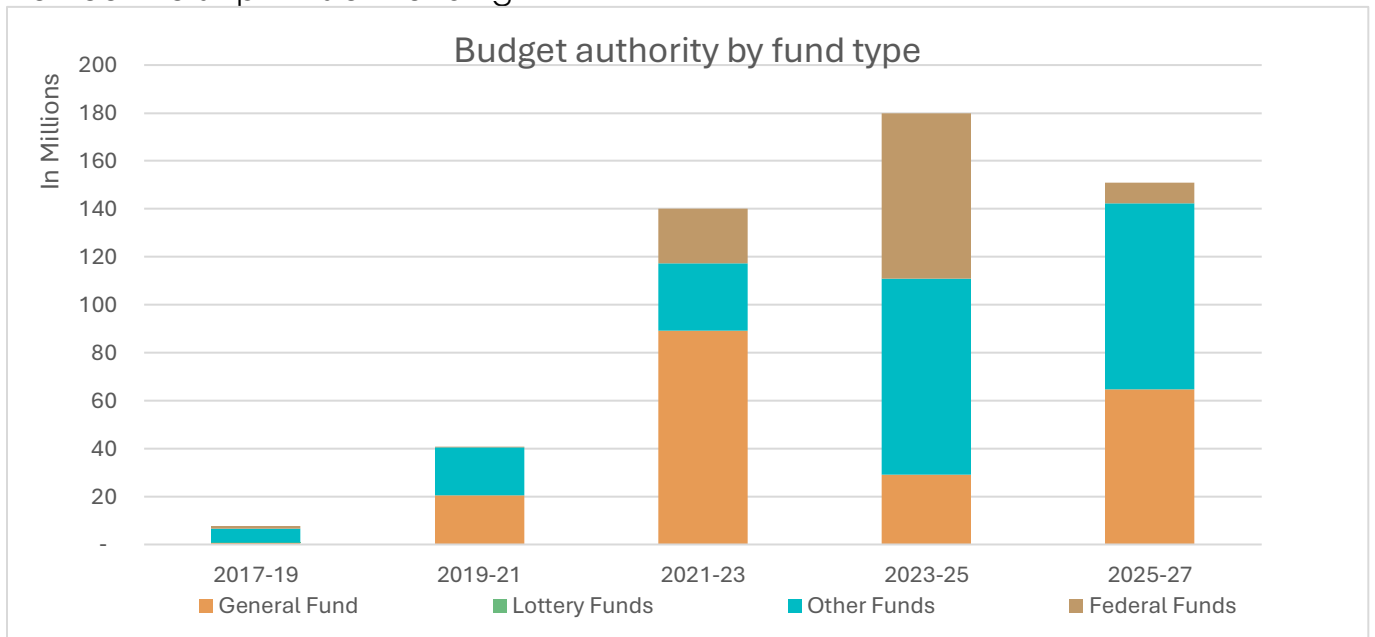
- **Outcomes:** This program is launching again in 2025 after being closed since 2019. The last time the program was in operation, 10 organizations received a combined \$1.28M in funds and supported 93 homeowners to make critical repairs and home modifications.

Homeownership and Foreclosure Prevention Funding

Homeownership Division Funding in Millions



Homeownership Division Funding



POLICY OPTION PACKAGES:

Policy Option Package 518: Homeownership Development - LIFT and HDIP

This package supports two Homeownership Development programs that seek to increase the supply of affordable homes for purchase in Oregon: a) an allocation of \$100M in Article XI-Q Bonds for the Local Innovation and Fast Track (LIFT) Homeownership program; and b) an allocation of \$16.6M in General Funds for the Homeownership Development Incubator Program (HDIP).

GF \$16.8 M | LF \$0 | OF \$17.5M | FF \$0 | CC \$ 100M | Pos. 0.8, FTE 1.0

Policy Option Package 090: Homeownership Centers

OHCS supports 15 homeownership centers that serve residents in every county across the state. With a reduced amount of document recording fees, this package ensures continuation of critical services throughout the biennium. (This is part of a broader policy option package.)

GF \$2.1 M | LF \$0 | OF .9M | FF \$0 | Pos. -1.0, FTE -1.50



Policy Option Package 521: Down Payment Assistance Tied to OHCS Lending

This package requests General Funds for Down Payment Assistance (DPA) tied to OHCS lending programs: Flex Lending and Oregon Residential Bond Loan Program. The biggest barrier to homeownership for most people is the lack of down payment funds, particularly reaching a 20% down payment, which removes the additional cost of mortgage insurance. The problem is exceptionally acute in communities of color that have been systematically excluded from homeownership opportunities and thus have lower personal and family wealth. The goal of this funding is to increase the impact of taxpayer dollars while allowing families to build equity. Providing DPA paired with OHCS mortgage lending products will allow public dollars to stretch farther by creating efficiencies in DPA delivery.

GF \$7.5M | LF \$0 | OF \$7.5M | FF \$0 | Pos. 0, FTE 0.0

Policy Option Package 522: Culturally Responsive Down Payment Assistance

OHCS funds a network of 21 community-based organizations that have the cultural and technical expertise to reach underserved homebuyers and connect them with the knowledge and resources they need to achieve their dream of homeownership. Through this funding package, OHCS will ensure that this network of culturally responsive providers can continue eliminating the biggest barrier to homeownership through down payment assistance that covers up to 20% of the purchase price in the form of a grant or forgivable loan.


GF \$30M | LF \$0 | OF \$30M | FF \$0 | Pos. 0, FTE 0

Policy Option Package 525: Foreclosure Avoidance Counseling

Foreclosure prevention is an essential tool for homelessness prevention. There is a strong need for sufficient funding to continue work to reduce homelessness, eliminate racial disparities in housing, and ensure that homeowners can remain stable in their homes. This package requests \$3.5 million in General Fund resources for OHCS' existing Foreclosure Avoidance Counseling (FAC) program to support homeowners across the state who are in danger of foreclosure. This investment will support a vast statewide network of certified foreclosure avoidance counselors who work with clients in jeopardy of losing their homes. This investment ensures that this impactful work can continue.

GF \$2.5M | LF \$0 | OF \$0 | FF \$0 | Pos. 0, FTE 0.0

Policy Option Package 527: Supporting Owners of Manufactured Homes



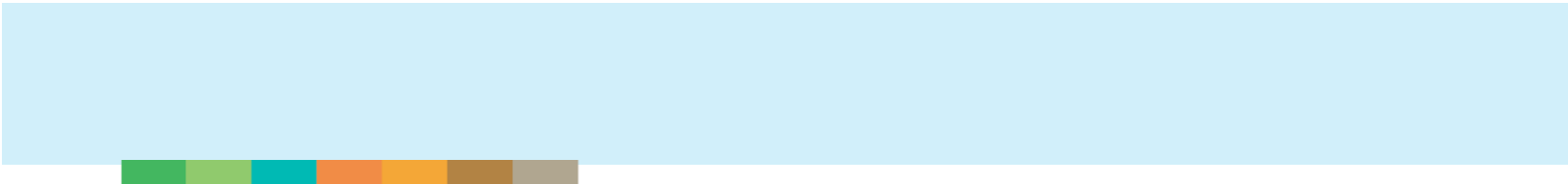
This package helps provide affordable resources for manufactured home owners to replace dilapidated and unsafe homes with new, energy-efficient homes, allowing them to stay in their homes safely and securely while building wealth through homeownership with a focus on underserved manufactured housing residents, many of whom are well under 100% median family income (MFI) and live in rural areas.

GF \$2.5M | LF \$0 | OF \$2.5M | FF \$0 | Pos. 0, FTE 0.0

Housing Stabilization Division

OHCS' Housing Stabilization Division (HSD) provides critical statewide services addressing homelessness, housing stabilization, and energy and climate resilience for Oregonians with low incomes. Through a network of providers, including community action agencies, local governmental and community-based planning groups, and community-based and culturally responsive organizations, HSD provides funding for shelter, re-housing support, rent assistance and other eviction prevention services, energy assistance, and supports community service connections to critical needs for health care, education, and nutritious food. These programs include:

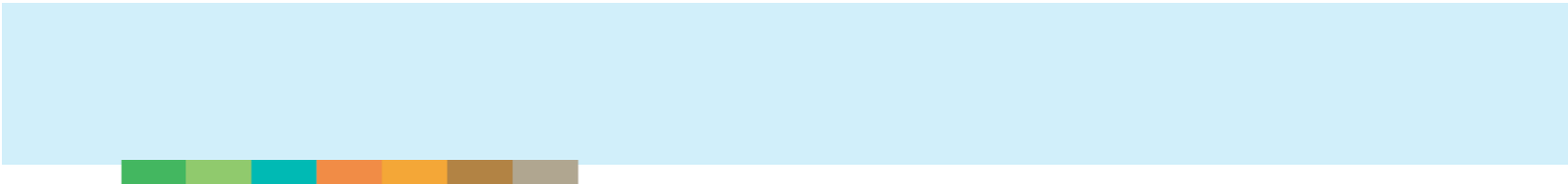
- **Homeless Services Programs** provide services that assist low-income households experiencing homelessness and housing instability to stabilize and move toward accessing opportunity. Funded interventions include shelter, navigation centers, re-housing, landlord rent guarantee funding, and other stability services assistance programs.
- **Housing Retention Programs** provide funding to provide services that support Oregon tenants in maintaining housing stability. Programs administered through the Housing Retention section include rental assistance programs, mediation services, legal services, the Individual Development Account (IDA) Program supporting stabilization and thriving through asset building matched savings, and the federally funded Community Services Block Grant anti-poverty program.
- **Executive Order Programs on Homelessness** provide funding for shelter, rehousing, long-term rent assistance, and eviction prevention in Multi-Agency Coordination (MAC) regions and through Local Planning Groups (LPGs) in the Balance of State region in response to Executive Orders 23-02, 24-02, and 25-01.

- 
- **Energy Services and Weatherization Programs** provide bill payment assistance and weatherization services to Oregon households with lower incomes to make their heating and energy costs more affordable, help households in avoiding or responding to shut offs, and increase energy savings.
 - Low-Income Energy Assistance Programs provide bill payment assistance to eligible households earning 60% or less of Oregon's median income.
 - Low-Income Weatherization Assistance Programs provide home health and safety improvements, heating system repair and replacement, energy conservation services, and baseload measures to eligible households earning 200% or less of the federal poverty level.

Don't Lose Ground

The 2023-25 biennium saw unprecedented investments into homelessness and housing stability programs to respond to the immediate needs of unhoused people through the creation and maintenance of shelter beds, rehousing efforts that move people from homelessness into housing, and to provide eviction prevention financial assistance and services to prevent people from experiencing homelessness. The interventions of shelter, re-housing, and eviction prevention together support a coordinated, statewide homelessness response system.

The funding for these interventions came through several routes in 2023-25 – service level funding for established programs like the Emergency Housing Assistance Program (EHA) and the State Homeless Assistance Program (SHAP), one-time funding of programs like the Oregon Eviction and Diversion and Prevention Program (ORE-DAP), special allocations like SB 5511 and SB 1530 that provided operational funds for shelters to prevent closure, and importantly, funding tied to the governor's Executive Orders on Homelessness.

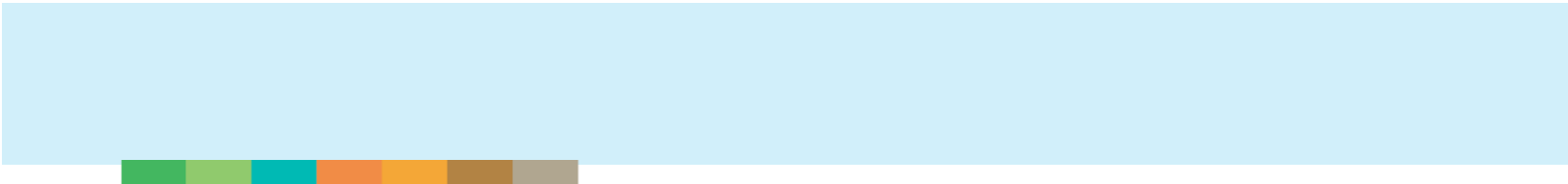


In preparation for the 2025-27 biennium, the Housing Stabilization Division engaged with partners in a Sustained Shelter Funding analysis to better understand funding levels required to maintain the progress made through all the available funding streams in order to not lose ground on the progress made. This information would then help the Housing Stabilization Division organize funding efforts in 2025-27 around evidence-based interventions rather than by funding source. The policy option packages supporting shelter, rehousing, and eviction prevention will appear in more than one section below because in 2023-25, executive order response was led by a distinct team within HSD to better respond to the emergency nature of the funding, though the programs largely aligned with interventions also funded through the Homeless Services and Housing Retention sections.

Sustained Shelter Funding analysis templates were sent to all HSD 2023-25 biennium grantees, requesting the following information:

- Historic funding levels and corresponding goals as basis of 2025-27 projections;
- Projections per cost category to maintain level of efforts (operations, staffing, services, admin, etc.);
- Qualitative narrative on regional impacts if cost projections not received; and
- Information on cost drivers, depreciation, and acuity levels of need for clients.

OHCS engaged in significant partner outreach and one-on-one engagement with all grantees that included explanation of analysis, allowed and disallowed costs, and need for qualitative data collection. Grantees' submissions were reviewed for cost reasonableness and levels of needs, as well as consideration of regional impacts. Cost projections also accounted for inflation: 4.2% for services and materials, and 6.8% for staffing.



OHCS engaged in a comparative analysis to maintain consistent funding projections based on project type and geographic region. The analysis built upon 161 submissions received, an overall response rate of 86%. Projections for five non-responding grantees were based on averages of program area and organizational type to maintain parity. Overall cost drivers were analyzed to evaluate and anticipate additional funding needs.

HOMELESS SERVICES SECTION

Programs

The [Emergency Housing Assistance \(EHA\) Program](#) uses state General Fund service level funding to assist persons who are of low or very low incomes who are homeless or are unstably housed and at risk of becoming homeless. Part of the funding originates from the document recording fee (DRF) and 25% of the Homeless Services Section allocation is targeted toward veterans.

Shelter funding: The [State Homeless Assistance Program \(SHAP\)](#) are state General Fund service level funding that assist the operations of emergency shelters and supportive services for literally homeless individuals and families. Operational Support for Shelters funding, appropriated through SB 5511 and SB 1530, maintained statewide shelter bed capacity through provision of operations funding.

The [Rent Guarantee Program](#) provides financial assistance to landlords who rent or lease to low-income households, with specific barriers to housing such as criminal history, poor credit history, and poor landlord references, etc., by guaranteeing payments to landlords for unpaid rent and for eviction and property damage costs.

The **By and For Initiative, Native American Tribes of Oregon** (BAFI-NATO) program provides state General Funds to create and/or support local existing programs designed to prevent and reduce homelessness in Tribal communities. These funds are direct allocations to the nine Federally Recognized Tribes of Oregon appropriated through HB 5019 and SB 5511.



Project Turnkey (PTK) and Navigation Centers:

While OHCS did not receive appropriations specific for these two programs in the 2023-25 biennium, both were interwoven into the shelter network system that was developed and supported by SB 1530 Operational Support for Shelters program.

PTK is a program that was initially supported by state General Funds from HB 5202 (2022 session). The program was designed to assist people experiencing homelessness or at risk of homelessness. These investments were used to increase shelter stock and support the sheltering and homeless services needs of Oregonians by providing infrastructure, operation, and service support for emergency shelter and transitional housing as well as the supportive services for responding to homelessness.

Navigation centers are low-barrier outcome-based sites for individuals experiencing homelessness or at risk of homelessness to access services. Navigation centers differ from traditional one-night-stay shelters as limited stay programs designed to alleviate pressures associated with experiencing homelessness by providing a wide scope of services and wraparound supportive services within one location.

The [Housing Choice Landlord Guarantee Program](#) provides financial assistance to landlords to mitigate damages caused by Housing Choice Voucher (also known as Section 8) tenants as a result of their occupancy. In 2023, the eligibility was expanded to include landlords that rehoused literally homeless individuals and families under Executive Order 23-02, 24-02, and 25-01. The expansion funding is represented in the Executive Order One-Time Funds table.

The federal [Housing Stabilization Program](#) assists families on low incomes who are receiving a state Temporary Assistance for Needy Families (TANF) grant and are homeless or are unstably housed and at risk of becoming homeless.

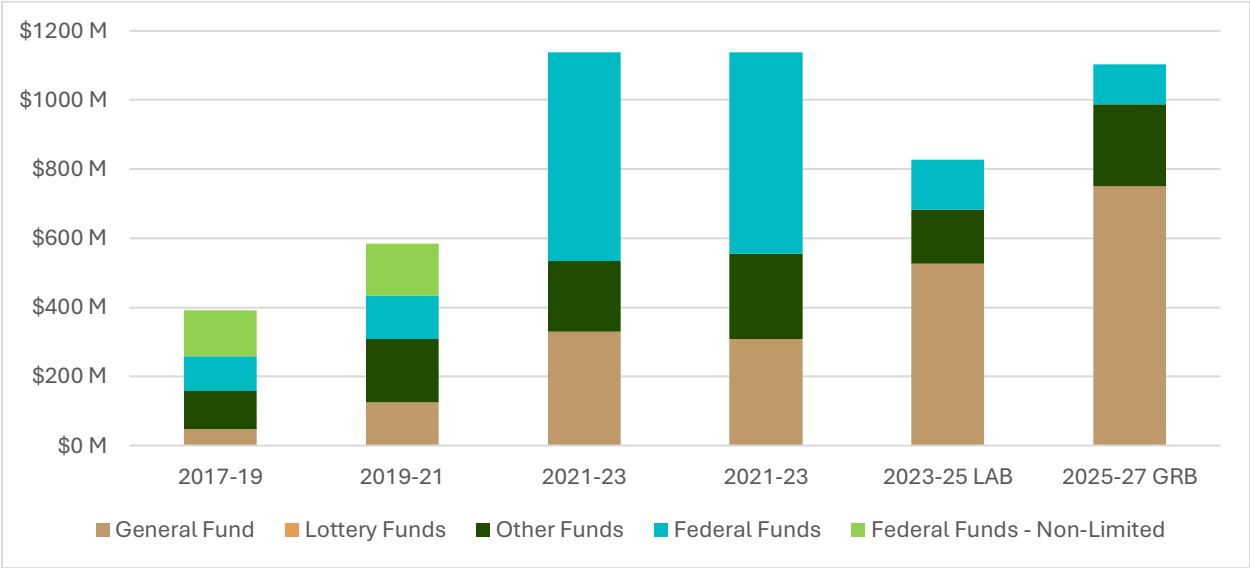
The federal [Emergency Solutions Grant Program](#) assists individuals and families on low incomes quickly to regain stability in permanent housing after experiencing a housing crisis or homelessness.



The [Elderly Rental Assistance Program](#) assists very low-income seniors (58+) who are homeless or are unstably housed and at risk of becoming homeless.

The federal [HOME Tenant Based Assistance Program](#) assists very low-income families to stabilize their housing.

Housing Stabilization Programs Funding

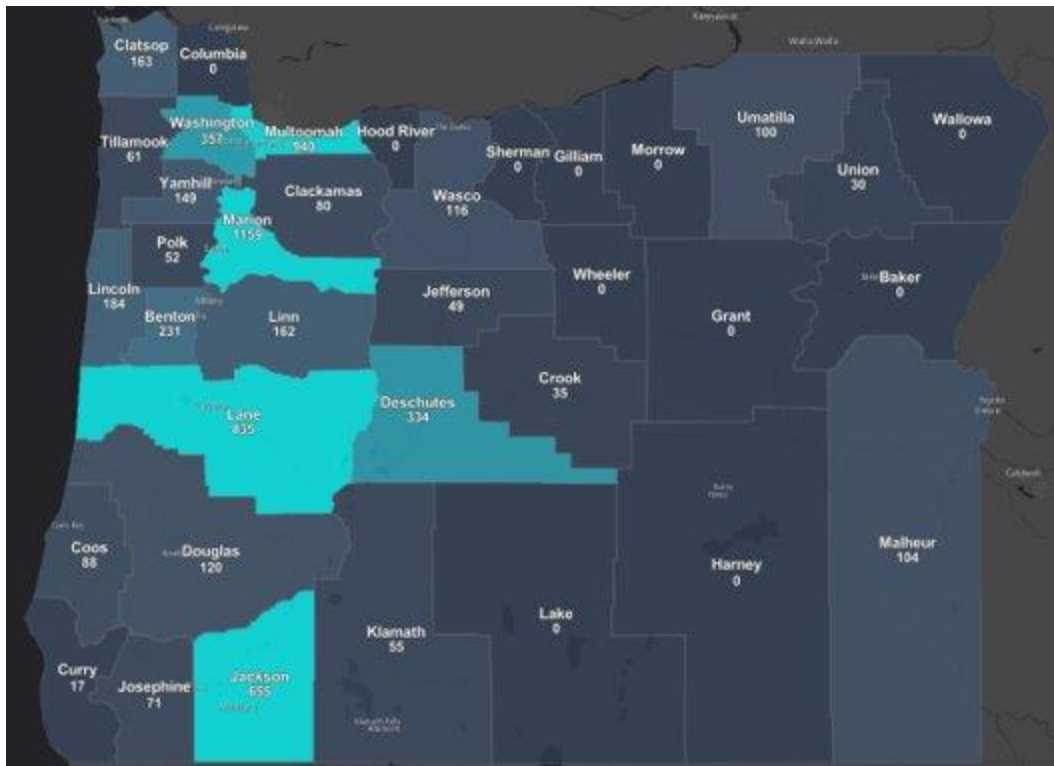


2023-25 One-Time Funds

The largest source of one-time Homeless Services Section funding in 2023-25 was shelter operation funding to prevent reductions in state shelter bed capacity, representing significant investment into the creation of a true statewide shelter system. An overview of one-time funded work can be found below.

Investment	Description	Allocated
Shelter Operations	<p>Operations funds, from SB 5511, to support ongoing shelter operations and infrastructure for previously funded emergency shelters, Navigation Centers, and Project Turnkey sites.</p> <p>Operational funds, from SB 1530, to continue to support ongoing shelter operations and infrastructure for previously funded emergency shelters, Navigation Centers, Project Turnkey sites, and expanded to include other shelters from across the state that were experiencing significant financial gaps and/or were at risk of reducing services or closing.</p>	<p>SB 5511 - \$24.1M</p> <p>SB 1530 - \$65M</p>
By and For Initiative, Native American Tribes of Oregon investments	<p>Program provides state General Funds to create and/or support local existing programs designed to prevent and reduce homelessness in Tribal communities.</p>	\$10M
EHA PETS	<p>Supportive funding for literally homeless individuals' and families' companion animals to facilitate access to permanent housing</p>	\$1M
Navigation Centers—operational funding	<p>No specific appropriation for navigation centers; however, they were funded through SB5511 and SB1530 for ongoing operations.</p>	n/a
Project Turnkey—operational funding	<p>No specific appropriation for Project Turnkey sites; however, these were funded through SB5511 and SB1530 for ongoing operations.</p>	n/a

Between Jan. 1, 2023, and Oct. 31, 2024, OHCS funded **6,147 beds** across **136 shelters** through the shelter funding administered by both Homeless Services and Executive Order sections.



2025-27 Policy Option Packages:

These POPs are intended to maintain investments made both through the Homeless Services section and the Executive Order section. Please see Don't Lose Ground explanation for more detail.

Policy Option Package 501: Maintaining Shelter Operations

To prevent the closure of 4,800+ existing state-funded shelter beds
 GF \$217.9 M | LF \$0 | OF \$0M | FF \$0 | Pos. 0, FTE 0

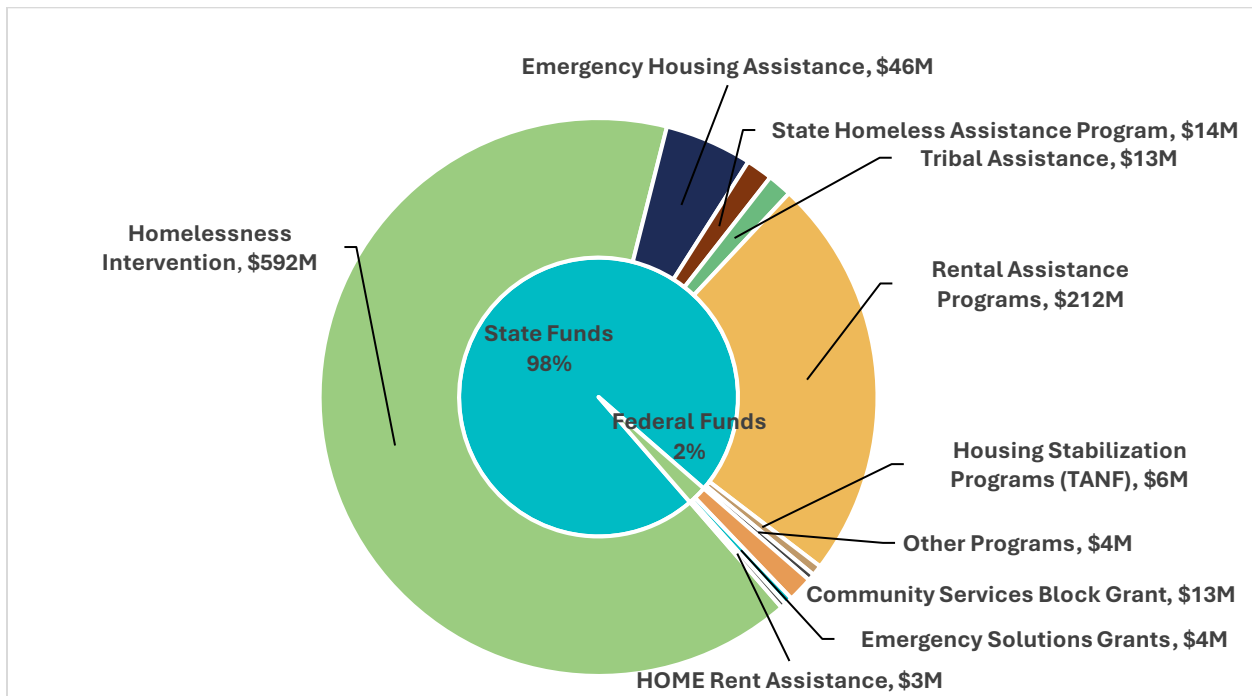
Policy Option Package 502: Sustaining Rehousing Unsheltered Households

To rehouse 2,870 additional Oregonians
 GF \$188.2 M | LF \$0 | OF \$0M | FF \$0 | Pos. 0, FTE 0

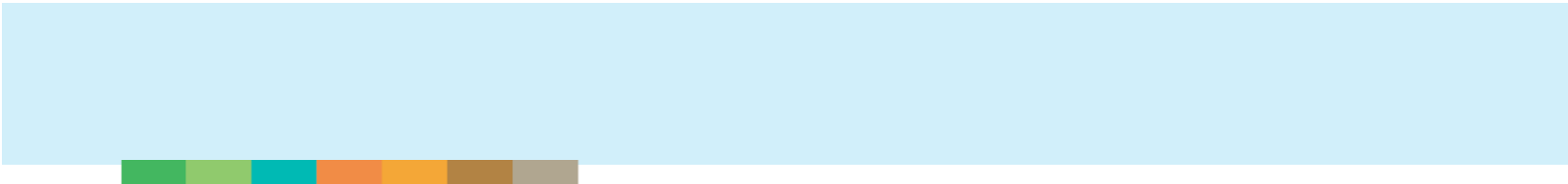
Policy Option Package 506: Tribal Housing Grant Fund

To invest in the housing needs of the nine federally recognized Tribes in Oregon based on each individual Tribe's housing needs in homelessness response and housing retention, affordable rental housing, and low-income homeownership opportunities. This will continue some of the BAFI-NATO programming but expands our Tribal funding approach beyond the Housing Stabilization Division.
 GF \$12.8 M | LF \$0 | OF \$0M | FF \$0 | Pos. 0, FTE 0

Homelessness and Housing Retention Funding



HOUSING RETENTION Programs

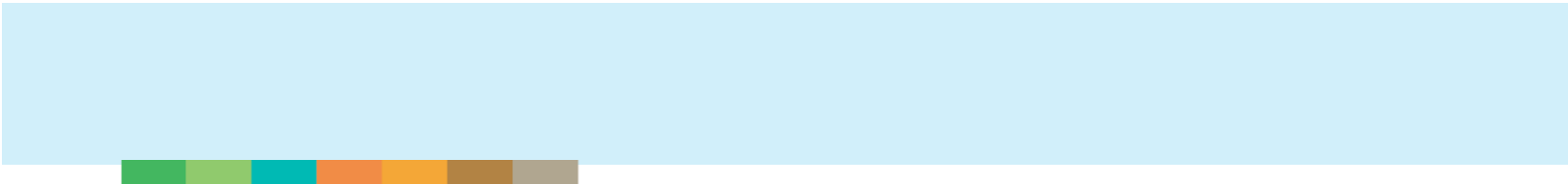


The Oregon Eviction Diversion and Prevention Program (ORE-DAP) is a statewide program that focuses on prioritizing households who are most at risk of facing evictions and homelessness and are 80% or below of the area median income. This funding is primarily allocated through the 18-member Community Action Agency (CAA) Network, with a separate 30% set-aside to three culturally responsive organizations (CRO) who work with households to determine the most effective intervention to stop the eviction process. Eligible expenses include but are not limited to rental and utility payments (including arrears), security deposits, landlord/tenant mediation services and legal services, supported employment services, housing navigation and on-going case management services to assist the household with avoiding eviction and achieve housing stabilization.

The Eviction Prevention Rapid Response Program (EPRR) provides rapid financial assistance paired with legal services for Oregonians at most imminent risk of eviction, those with eviction court summons, to allow them to maintain housing stability. EPRR was administered in a partnership between Oregon Law Center and Public Partnerships LLC (PPL), with PPL administering the direct client financial assistance portion of the program. All 2023-25 direct financial assistance funds have been exhausted through Dec. 30, 2024. Legal services funding is described in more detail below.

Youth Rental Assistance Programs

The Legislature appropriated \$5M in General Fund to OHCS through HB 5019 during the 2023-25 biennium to increase services and assistance to school-aged,



K-12 children or their families who are experiencing homelessness or are at risk of experiencing homelessness. This new youth-specific funding represents an opportunity to grow and strengthen OHCS' overall support of youth and family housing stabilization efforts in partnership and alignment with existing Rental Assistance for Youth (RAY) funding and other state level long-term rent assistance. Funding has been directed to the Other Funds account and can span into the next biennium. The RAY and YEHA programs support young people and their families with housing placement, eviction prevention, ongoing rental assistance, case management, supported employment, as well as basic needs.

Tenant and Legal Services

OHCS funded two organizations, Community Alliance of Tenants and Springfield Eugene Tenant Association, to provide access to tenant education and housing rights coaching, resources, and information to empower tenants to advocate for themselves and their right to safe, stable, and affordable housing. Housing is the basis of a strong community, and tenant resource agencies assist tenants to advocate collectively for fair and equal protections in housing practices and policies.

Oregon Law Center provided referrals to EPRR rental assistance, legal advice, legal representation, and other services to households facing eviction that match geographic and subject-matter requirements. OHCS funded a virtual legal advice clinic that allowed low-income Oregonians to receive attorneys' answers to civil legal questions related to housing, employment, and benefits. Legal services partners provide balanced legal information for tenants and landlords, which includes generating and publishing materials in plain language that are translated into accessible languages and circulating materials to relevant agencies in the field.

The [Community Services Block Grant \(CSBG\)](#) is a federal program that assists communities toward the reduction of poverty, the revitalization of low-income communities and the empowerment of low-income families and individuals to become fully self-sufficient.

2023-25 One-Time Funds

The majority of funding flowing through the Housing Retention Section provides direct client assistance and services to help Oregonians remain in their homes.

An overview of one-time funded work can be found below.

Investment	Description	Allocated
<p>Oregon Eviction Diversion and Prevention (ORE-DAP) Program</p>	<p>Provides local rental assistance through the CAA network in tandem with providers of other critical eviction and housing related resources to support Oregonians facing eviction in maintaining housing stability. ORE-DAP includes 30% set-aside funds for CROs—IRCO, OWRC, and Urban League—described in detail below:</p>	<p>\$73M</p>
	<p>Immigrant and Refugee Community Organization (IRCO) - \$5.3M: Funding to support a full range of homelessness prevention efforts, including rental assistance, legal services, case management and more for communities served by IRCO.</p>	
	<p>Oregon Worker Relief Coalition (OWRC) - \$13.525M: Investments in the OWRC allow for rental assistance and other flexible services to be provided to Oregonians statewide through the Coalition’s network of community organizations, primarily serving immigrants and refugees across Oregon.</p>	
	<p>Urban League-Project Empowerment - \$13.25M: Supports equitable access to housing for African American and other BIPOC communities by providing wraparound services for community members experiencing houselessness or housing instability. This project has formed a cohort of participants who will receive long-term housing supports and work with</p>	

	staff to address housing, healthcare, and employment needs.	
Eviction Prevention Rapid Response (EPRR) Program	EPRR funds allowed for rapid financial assistance for Oregonians at most imminent risk of eviction—those with eviction court summons to allow them to maintain housing stability.	\$21M
Tenant Services Including Legal Services	Funding to support key partners in OHCS' homelessness prevention work including Community Alliance of Tenants (CAT), Springfield Eugene Tenant Association (SETA), and Oregon Law Center.	\$6M
Youth-EHA (YEHA)	This new youth-specific funding represents an opportunity to grow and strengthen OHCS' overall support of youth and family housing stabilization efforts in partnership and alignment with existing RAY funding and other state level long-term rent assistance. Funding has been directed to the Other Funds account and can span into the next biennium.	\$5M
PSU Program Evaluation	Evicted in Oregon Portland State University – Research continued to provide ongoing program evaluation and reports of their findings about evictions in Oregon. No additional funding in 2023-25.	\$0

Below are some key outcomes associated with the funds and programs listed above:

Investment	Outcomes
ORE-DAP and EPRR including HB 5019, SB 5511, and SB 1530 funding	17,569 households have been served as of Oct. 31, 2024, stopping their evictions.
CRO investments from the 30% set-aside out of ORE-DAP SB 5511 and SB 1530 funding	981 households served as of 2025, with rent assistance and housing services
Youth EHA (YEHA) contracts were signed at the end of October 2024.	Since Nov. 1, 2024, 40 households have been enrolled, and 126 different services have been provided for those 40. Of the 126 services provided, 106 of those were for rent and deposit assistance.

Policy Option Packages

These packages are intended to maintain investments made both through the Housing Retention section and the Executive Order section. Please see Don't Lose Ground explanation for more detail.

Policy Option Package 504: Continuing to Prevent Evictions: Infrastructure

GF \$63.5 M | LF \$0 | OF \$0M | FF \$0 | Pos. 0, FTE 0

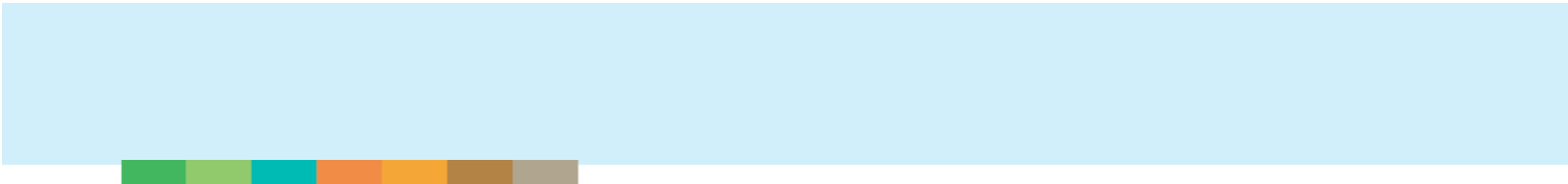
Policy Option Package 505: Continuing to Prevent Evictions: Financial Assistance

\$173.2M to prevent eviction and homelessness for 25,000 additional Oregonians through two separate, but interdependent policy option packages. This investment would continue ORE-DAP, EPRR, and tenant and legal services programs in Oregon.

GF \$109.7M | LF \$0 | OF \$0M | FF \$0 | Pos. 0, FTE 0

Executive Order Programs on Homelessness

On Jan. 10, 2023, Gov. Tina Kotek declared a state of emergency due to unsheltered homelessness in designated areas across Oregon through Executive Order (EO) 23-02. Kotek also proposed three actionable goals to be achieved



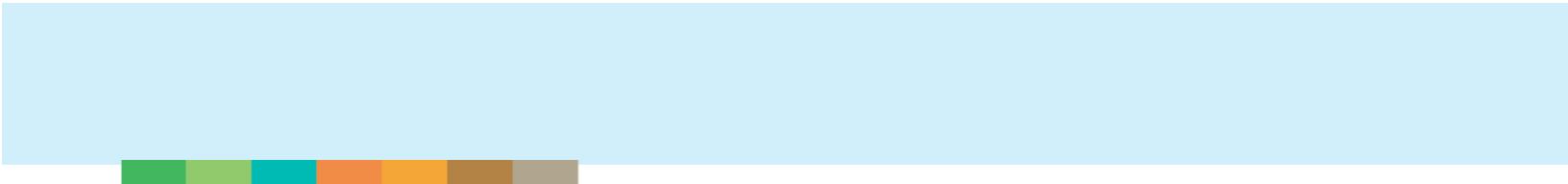
by Jan. 10, 2024: 1) prevent 8,750 households from becoming homeless statewide; 2) add 600 low-barrier shelter beds in emergency areas as designated in EO 23-02; and 3) rehouse at least 1,200 unsheltered households in emergency areas designated in EO 23-02. The Oregon Legislature acted swiftly in partnership with Kotek and passed HB 5019 and HB 2001 to fund and support the emergency response efforts, in addition to supporting homelessness response efforts in the Rural Oregon Continuum of Care (commonly referred to as the Balance of State or BoS), with additional goals to be achieved by June 30, 2025: 1) add 100 low-barrier shelter beds in the BoS; and 2) rehouse at least 450 unsheltered households in the BoS.

On Jan. 9, 2024, Kotek signed EO 24-02 to maintain the added capacity to the state's shelter system and expand goals to rehouse and prevent homelessness for additional households. Regions designated within EO 24-02 will work collectively to rehouse 650 households through the Oregon Rehousing Initiative (ORI), though some groups have identified regional goals that reach beyond that number. The BoS' ORI goals are not included within EO 24-02. They will collectively rehouse an additional 277 households by June 30, 2025, through ORI.

On Jan. 9, 2025, Kotek signed EO 25-01, extending the emergency response through January 2026. The order extends EO 24-02 and directs state agencies to continue the implementation of the executive order work on reducing homelessness. The new executive order intends to maintain the added capacity to the state's shelter system, rehouse people experiencing homelessness, and prevent homelessness in all designated regions.

Programs

EO 23-02 Shelter, Rehousing, and Street Outreach programs were initiated through EO 23-02 and HB 5019. By Jan. 10, 2024, 1,047 low-barrier shelter beds were created and 1,426 households experiencing unsheltered homelessness were rehoused in the original EO 23-02 regions. MAC groups are continuing to



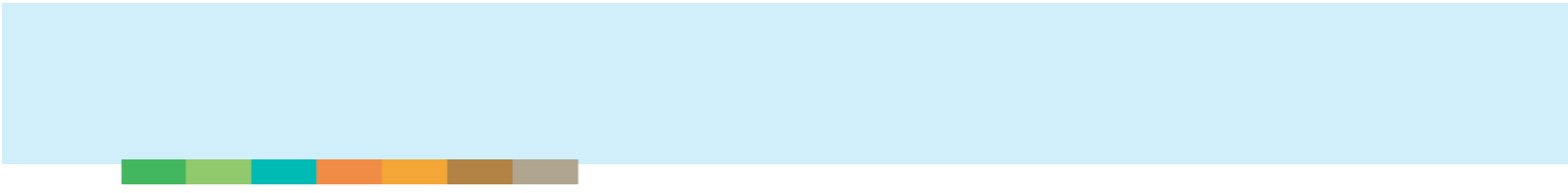
expend their HB 5019 allocations, with a continuation of rehousing placements taking place until June 20, 2025. In addition to programs implemented in the original EO regions, HB 5019 appropriated funding for the Balance of State (BoS). Every community across the BoS received funding to implement rehousing programs and provide support for street outreach and other critical homeless service response systems, such as sanitation services and data collection. A competitive funding process was utilized to select the most viable and robust projects to receive additional shelter funding. BoS regions are implementing these programs, with rehousing and new shelter bed goals to be met by June 30, 2025.

EO 23-02 included a goal of preventing 8,750 households from becoming homeless statewide. Funds were administered through two existing programs: 80% delivered through the Oregon Eviction Diversion and Prevention (ORE-DAP) program; and 20% delivered through the Eviction Prevention Rapid Response (EPRR) program. This goal was surpassed by providing prevention services to 9,024 households. For more information on ORE-DAP and EPRR, please refer to the Housing Retention section of this report.

OHCS received funding through SB 5511 to sustain work established during EO 23-02. EO regions were allocated funds to sustain efforts in emergency shelter, unit access/landlord engagement, and street outreach. OHCS collaborated with regions to conduct a needs analysis in each region to determine anticipated funding needs required to sustain the programs initiated during the EO.

The [Long-Term Rent Assistance](#) (LTRA) program ensures that households rehoused through EO 23-02 and HB 5019 investments continue to receive services and rental assistance beyond Jan. 10, 2024. This program aims to assist with rent costs, thereby increasing housing access and long-term stability for individuals exiting homelessness. LTRA funds (appropriated through SB 5511) have been allocated to the seven regions named in EO 23-02.

The [Oregon Rehousing Initiative](#) (ORI) is a statewide rehousing program in alignment with EO 24-02. The program utilizes targeted universalism to address inequities within regional rehousing programs and prioritize communities disproportionately impacted by homelessness in their community. ORI allows for



up to 24 months of rental assistance per household served, using progressive engagement to tailor services to the individual needs of each household. ORI funds were allocated to the nine regions named in EO 24-02, the remaining regions in the BoS, and included a 25% set-aside for culturally responsive organizations (CROs). In total, ORI has a goal of rehousing an additional 1,137 households by June 30, 2025.

Investment	Description	Allocated	
Shelter, Rehousing, and Street Outreach (HB 5019)	In designated EO regions, the EO 23-02 goals for rehousing placements and shelter bed creation were to be met by Jan. 10, 2024. In the Balance of State, shelter and rehousing goals are to be met by June 30, 2025.	Total: \$111.3M	
		2021-23 \$21.6M	2023-25 \$89.6M
Sustaining Shelter and Unit Access (SB 5511)	EO regions were allocated funds to sustain EO 23-02 efforts in emergency shelter, unit access/landlord engagement, and street outreach.	\$65.6M	
Long-Term Rent Assistance (LTRA) (SB 5511)	To provide long-term rental assistance to households rehoused through EO 23-02 and HB 5019 investments. Ensuring households continue to receive services and rental assistance beyond Jan. 10, 2024.	\$39.7M	
Oregon Rehousing Initiative (ORI) (SB 5701)	ORI households must be rehoused by June 30, 2025; however, regions have through June 30, 2027, to expend their ORI funds, as program guidance allows regions to allocate up to 24 months of rental assistance for households. Regions use progressive engagement to tailor services to the individual needs of each household.	\$39M	

Below are some key outcomes associated with the funds and programs listed above:

Investment	Outcomes
<p>Shelter, Rehousing, and Street Outreach (HB 5019)</p>	<p>In designated EO regions, 1,047 low-barrier shelter beds were created by Jan. 10, 2024, surpassing the original goal of 600 beds. Exceeding the original goal of 1,200 households, 1,426 households experiencing unsheltered homelessness were rehoused by Jan. 10, 2024. Data available through Sept. 30, 2024, reflect that both collective Balance of State goals—rehousing 450 households and creating 100 low-barrier shelter beds—have already been surpassed.</p>
<p>Long-Term Rent Assistance (LTRA) (SB 5511)</p>	<p>OHCS is reviewing the MAC groups' final program plans. Program rollout and implementation is ongoing.</p>
<p>Oregon Rehousing Initiative (ORI) (SB 5701)</p>	<p>EO regions (including the three opt-in regions) have a goal of rehousing 650 households, though some regions have identified regional goals beyond that number. In the BoS, regions have a collective ORI goal of 277 households. The three culturally responsive organizations have a collective ORI goal of 195 households. Households are to be placed by June 30, 2025, and implementation statewide is underway.</p>

Policy Option Packages

These packages are intended to maintain overall investments in the homelessness and housing instability response system and are shared with the Homeless Services and Housing Retention sections. Please see Don't Lose Ground explanation for more detail.

Policy Option Package 501: Maintaining Shelter Operations

To prevent the closure of 4,800+ existing state-funded shelter beds
GF \$16.8 M | LF \$0 | OF \$0 | FF \$0 | Pos. 0, FTE 0

Policy Option Package 502: Sustaining Rehousing Unsheltered Households

To rehouse 2,870 additional Oregonians
GF \$188.2M | LF \$0 | OF \$0 | FF \$0 | Pos. 0, FTE 0

Policy Option Package 504: Continuing to Prevent Evictions: Infrastructure

GF \$63.5M | LF \$0 | OF \$0 | FF \$0 | Pos. 0, FTE 0

Policy Option Package 505: Continuing to Prevent Evictions: Financial Assistance | \$109.7M

\$173.2M to prevent eviction and homelessness for 25,000 additional Oregonians through two separate, but interdependent policy option packages. This investment would continue ORE-DAP, EPRR, tenant and legal services programs in Oregon.

GF \$109.7M | LF \$0 | OF \$0 | FF \$0 | Pos. 0, FTE 0

Energy Services Section

The ratepayer-funded [Oregon Energy Assistance Program \(OEAP\)](#) is a low-income electric bill payment assistance program for customers of Pacific Power and Portland General Electric at or below 60% of state median income. The purpose of this program is effectively to reduce service disconnections to those customers. Priority assistance shall be directed to customers who are in danger of having their electricity service disconnected.

The federally funded [Low-Income Home Energy Assistance Program \(LIHEAP\)](#) provides low-income households, at or below 60% of state median income, assistance with their home energy expenses. The LIHEAP program includes bill payment assistance, energy education, case management, and home weatherization services.

The [Low-Income Weatherization Assistance Program \(WAP\)](#) provides weatherization and energy conservation services at no cost to households at or below 200% of federal poverty income level. The U.S. Department of Energy, the U.S. Department of Health and Human Services, Bonneville Power Administration, and the Public Purpose funds (ECHO) provide funding for the program.

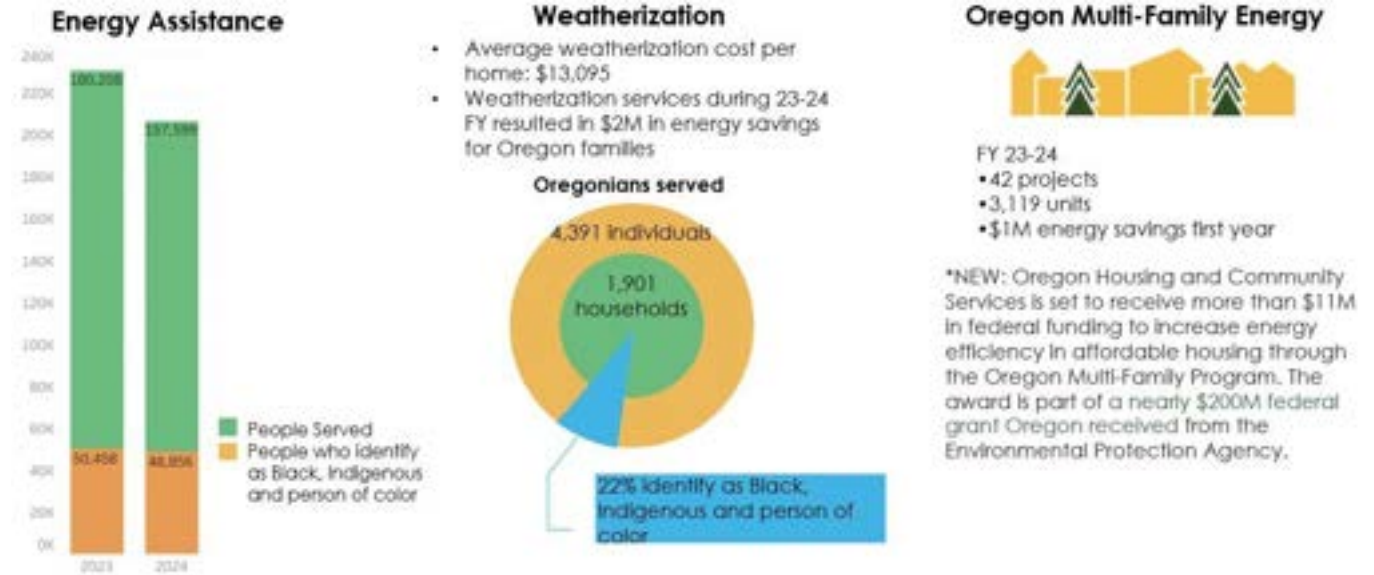
The state tax-funded [State Home Oil Weatherization \(SHOW\) Program](#) provides cash payments to eligible homeowners and contractors (both for-profit and nonprofit) for reimbursement of energy-efficient heating equipment and home weatherization improvements. Eligible dwellings must receive their primary heating fuel from a fuel oil dealer. Cash payments are awarded by a two-tier system to allow for varied income eligibility.

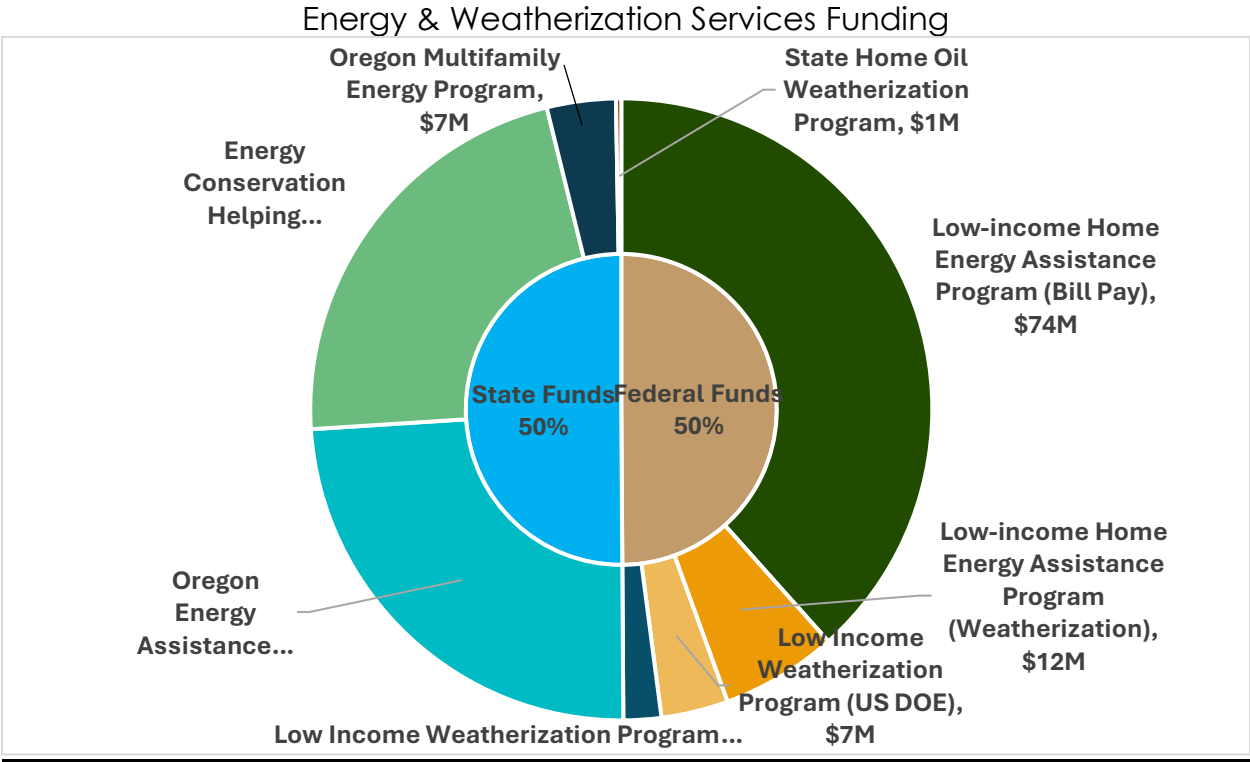
The [Oregon Multifamily Energy Program \(OR-MEP\)](#) provides owners and developers funds to increase energy efficiency in multifamily housing. Improvement measures include energy-reducing activities, such as installing energy-efficient insulation, windows, appliances, and light fixtures, among other activities. This program is available to all income-eligible developments seeking other OHCS funding offerings.

2023-25 One-Time Funds

Investment	Description	Allocated
<p style="text-align: center;">US DOE Weatherization</p>	<p>Funds supported through the Infrastructure Investment and Jobs Act (IIJA) to support low-income families to reduce their energy bills by making their homes more energy efficient.</p>	<p style="text-align: center;">\$15.3M</p>

Below are some key outcomes associated with the funds and programs listed above:





2025-27 Policy Option Package
N/A

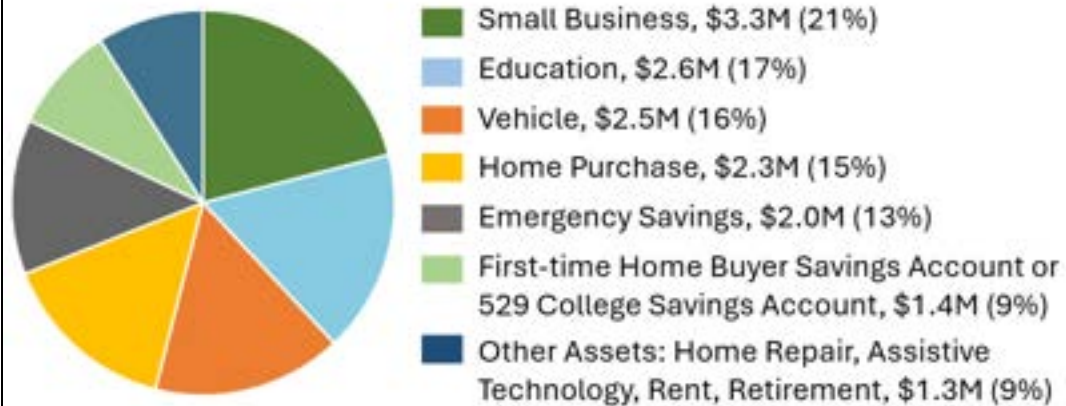
Individual Development Accounts

The IDA Initiative is a matched savings program funded by the state through individual and business taxpayer donations. The donor receives a tax credit for up to 90% of the value of the donation, with an annual statewide maximum of \$7.5 million in credits. The IDA Initiative helps families with lower incomes and limited net worth build assets and financial skills, which bring stability, financial security, and opportunity to their lives. With incentivized saving, personalized support, and financial education, Oregonians can access assets that can start an upward spiral of mobility. Through the IDA Initiative, Oregonians with low incomes are purchasing their first homes, completing post-secondary education, growing a microenterprise, or investing in one of several other asset categories. Oregonians who participate in the IDA Initiative express an increased sense of security, financial resilience, and hope for their future. Many participants note that they believe these changes would not have been possible without the IDA Initiative.

2023-25 One-Time Funds

Investment	Description	Allocated
Individual Development Account (IDA) Initiative	Additional General Fund dollars allocated in the 2024 Legislative Session to support IDA to expand access to the initiative	\$5M

Households use IDAs to accomplish goals that lead to financial stability and asset building.



\$15.5 million in matching funds disbursed to 2,223 residents throughout the state who completed their IDA in 2022 & 2023

2025-27 Policy Option Package

N/A

OHCS Sponsored Legislation

Bill	Summary
<p>HB 3034: Modifies the Emergency Housing Account (EHA)</p>	<p>This bill transfers management of EHA monies from the Housing Stability Council to OHCS, adds the Housing Stability Council to the list of advisory bodies developing policies for the use of EHA monies, cleans up language impacting how OHCS awards grants to our community partners, and adds clarity and flexibility to the process.</p>
<p>HB 3035: Clarifies OHCS' Lending Authority</p>	<p>This bill clarifies OHCS' authority to offer Flex Lending products, enabling the inclusion of more flexible financing options like refinances, rehabilitation loans, and loans for properties with accessory dwelling units or multi-unit homes.</p>
<p>HB 3036: Expands Oregon Affordable Housing Tax Credit (OAHTC)</p>	<p>This bill expands the eligible uses for the financial passthrough from the OAHTC program to include funding supportive services for tenants. It thereby provides a reliable resource for these services that helps reduce tenant instability.</p>
<p>HB 2139: Tribal Housing Fund</p>	<p>This bill will create a Tribal housing fund that OHCS administers. Moneys in the fund will be reserved for Oregon's nine federally recognized Tribes to use for the housing and homelessness needs they have identified as priorities in their communities.</p>

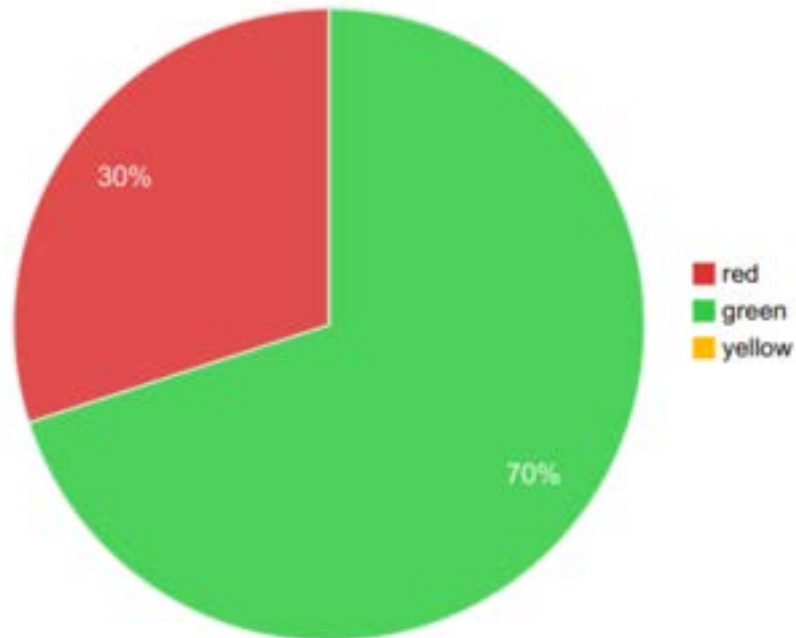
Key Performance Measures

	Approved Key Performance Measures (KPMs)
1	Reducing Homelessness – Percentage of homeless households who exited into permanent housing and retained that housing for six months or longer.
2	Energy Assistance – Of all crisis energy payments, the percentage of payments made to prevent power disconnections. Crisis payments include those for preventing disconnection of service or restoring service which was shut off.
3	Affordable Rental Housing – Percentage of regulated multifamily homes funded with grants, tax credits, and bonds, that will be affordable to households earning at or below 50% of the area median income.
4	Affordable Rental Housing for People with Disabilities – Percentage of affordable rental homes funded that provide rental opportunities for low-income individuals with physical or mental disabilities.
5	Affordable Rental Housing (Construction Costs) – Construction costs per square foot for newly built homes developed through grant and tax credit programs; and construction costs per square foot for rehabilitated homes developed through grant and tax credit programs, as compared to national RS Means data.
6	Affordable Rental Housing (Areas of Opportunity) – Percentage of affordable rental homes funded with 9% Low-Income Housing Tax Credits or HOME program funds that will be developed in high opportunity areas. High opportunity areas are defined as Census tracts that meet two of the following three criteria: low poverty rate, below-average unemployment rate, and high ratio of jobs to labor force.
7	Affordable Rental Housing in Rural Areas – Percent increase in the number of affordable rental homes that will be developed in rural areas. Rural areas are defined as communities with population 15,000 or less outside of the Portland Urban Growth Boundary in counties within Metropolitan Statistical Areas (Benton, Clackamas, Columbia, Deschutes, Jackson, Josephine, Lane, Marion, Multnomah, Polk, Washington, and Yamhill counties) and communities with 40,000 population or fewer in the balance of the

	state.
8	Homeownership – Percentage of households at or below the county median family income served by the Oregon Bond Residential Loan program.
9	Homeownership Services to People of Color – Percentage of people served by all OHCS homeownership programs who identify as people of color.
10	Agency Customer Service – Percentage of customers rating their satisfaction with the agency’s customer service as “good” or “excellent”: timeliness, accuracy, helpfulness, expertise, availability of information, overall.

	Proposed Key Performance Measures (KPMs)
New	Exits to Permanent Housing – Percentage of households enrolled in emergency shelter, street outreach, or rapid rehousing projects who exited to permanent housing.
Delete	Affordable Rental Housing – Percentage of regulated multifamily housing units funded with grants, tax credits, and bonds, that will be affordable to households earning at or below 50% of the area median income.
New	Affordable Rental Housing: Affordability – Percentage of regulated rental homes funded that will be affordable to households making at or below 50% of the area median income, whether through rent restrictions on the homes or through Project Based Rent Assistance (PBRA).
Delete	Affordable Rental Housing for People with Disabilities – Percentage of affordable rental homes funded that provide rental opportunities for individuals on low incomes with physical or mental disabilities.
New	Affordable Rental Housing: Unit Accessibility – Percentage of affordable rental homes funded that meet the definition of accessible as defined by the Building Codes Division of Department of Consumer and Business Services.
Delete	Affordable Rental Housing (Construction Costs) – Construction costs per square foot for newly built homes developed through grant and tax credit programs and construction costs per square foot for rehabilitated homes developed through grant and tax credit

	programs, as compared to national RS Means data.
New	Affordable Rental Housing: Development Costs – Percentage of newly built affordable rental housing projects with total development costs that fit within the bounds established through OHCS’ predictive cost model. This model is based on Oregon projects and is specific to affordable housing development.
Delete	Affordable Rental Housing (Areas of Opportunity) – Percentage of affordable rental homes funded with 9% Low-Income Housing Tax Credits or HOME program funds that will be developed in high opportunity areas. High opportunity areas are defined as Census tracts that meet two of the following three criteria: low poverty rate, below average unemployment rate, and high ratio of jobs to labor force.
Delete	Affordable Rental Housing in Rural Areas – Percent increase in the number of affordable rental homes that will be developed in rural areas. Rural areas are defined as communities with population 15,000 or less outside of the Portland Urban Growth Boundary in counties within Metropolitan Statistical Areas (Benton, Clackamas, Columbia, Deschutes, Jackson, Josephine, Lane, Marion, Multnomah, Polk, Washington and Yamhill counties) and communities with 40,000 population or fewer in the balance of the state.
New	Affordable Rental Housing: Rural Housing – Percentage of affordable rental homes funded that will be developed in rural areas as defined by OHCS.



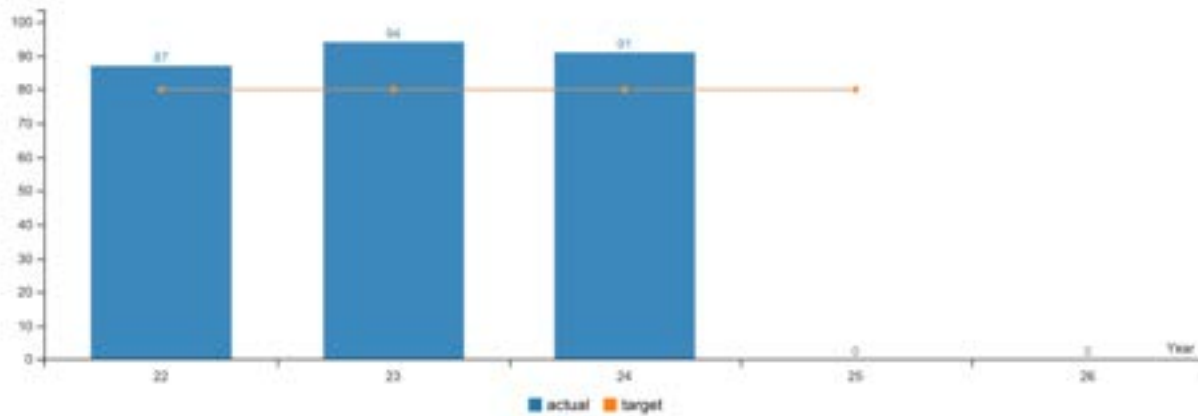
Performance Summary		
Green	Yellow	Red
Target to -5%	Target -5% to -15%	Target > -15%
70% of KPMs	0% of KPMs	30% of KPMs

Key Performance Measure 1: Reducing Homelessness

Percentage of homeless households who exited into permanent housing and retained that housing for six months or longer.

Data collection period: July 1-June 30

*Upward Trend = positive result



Report Year	2022	2023	2024	2025	2026
Percentage of homeless Oregonians remaining in permanent housing six months or longer					
Actual	87%	94%	91%		
Target	80%	80%	80%	80%	

How are we doing?

From July 1, 2023, through June 30, 2024, 91% of households who exited into permanent housing after receiving state homeless assistance funds had retained their housing for six months. There was a total of 10,347 households who exited to permanent housing and 9,437 of them retained housing after six months. This is above the target of 80%.

What factors affect our results?

Executive Order 23-02 and the related investments in the Balance of State for Emergency Shelter, Rehousing, and Homelessness Prevention led to a concerted effort across the state on rehousing previously unsheltered households into permanent housing situations and ensuring they can retain that housing. Even before the EO and related investments, OHCS had been prioritizing its rehousing and homeless retention efforts. These efforts have all contributed to OHCS meeting the target for this KPM.

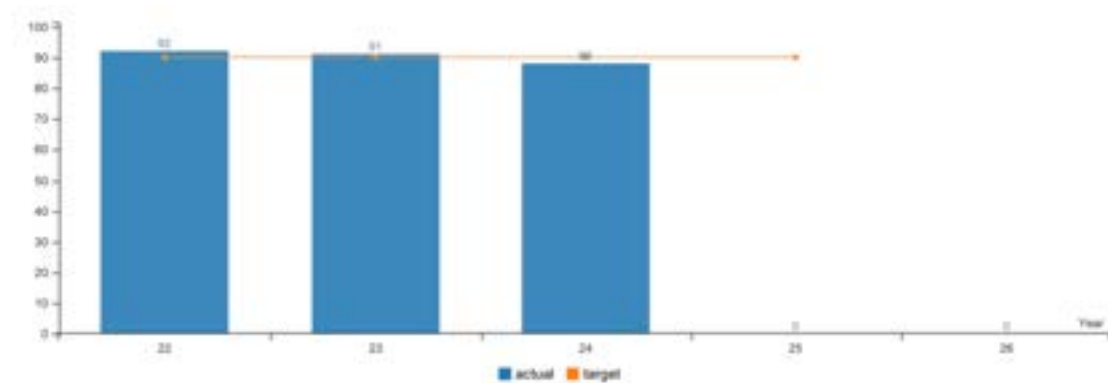
In 2022, OHCS shifted the methodology to measure this KPM to improve the data. Prior to 2022, community action agencies used data collected from six-month follow-up client contacts. In 2022, the method shifted to measuring “return to homeless” data reported in Homeless Management Information Systems (HMIS). The 2022 method queries all clients who exit into permanent housing from a street outreach, emergency shelter, transitional housing, safe haven, or a permanent housing program in the date range, six months prior to the report date range. Of those clients, the measure reports on how many of them did not return to homelessness as indicated in the HMIS system. A return is an entry into a street outreach, emergency shelter, transitional housing, safe haven or a new entry into a permanent housing program. This method matches the HUD System Performance Measure 2. The results indicated that only 9% of the households that were enrolled and exited into permanent housing returned less than six months after exiting the program. This leads us to infer that the remainder of households who did not re-enter the system have remained stably housed.

Key Performance Measure 2: Energy Assistance

Of all crisis energy payments, the percentage of payments made to prevent power disconnections. Crisis payments include those for preventing disconnection of service or restoring service that was shut off.

Data Collection Period: July 1-June 30

*Upward Trend = positive result



Report Year	2022	2023	2024	2025	2026
Energy Assistance					
Actual	92%	91%	88%		
Target	90%	90%	90%	90%	

How are we doing?

From July 1, 2023, through June 30, 2024, 88% of households receiving crisis energy assistance received payment for the prevention of power disconnections. This is below the target of 90%.

What factors affect our results?

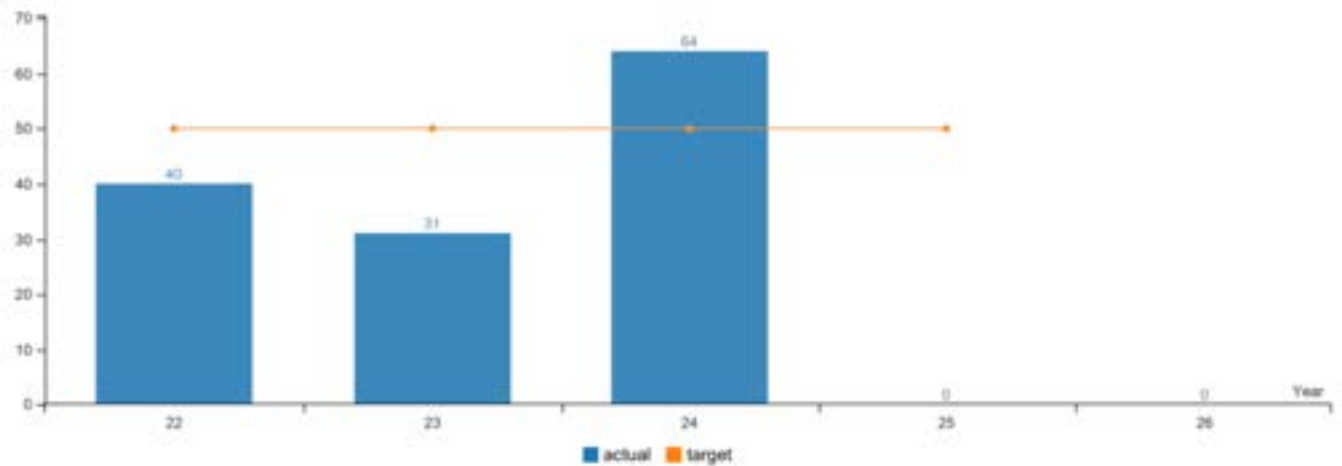
There has been a concerted long-term effort by the state and our community action partners to reduce the need for crisis interventions, focusing instead on the prevention of service disconnection. Restoration of service results in increased costs for families, for utility companies, and less efficiency for energy assistance programs. These efforts have been successful, with prevention services going from 82% of crisis payments in FY11 up to a high point of 96% in FY21. While the target of 90% was not met this year, we are pleased to see our prevention efforts are working and fewer households have sought assistance for restoration of services due to disconnections.

Key Performance Measure 3: Affordable Rental Housing

Percentage of regulated multifamily housing units funded with grants, tax credits, and bonds, that will be affordable to households earning at or below 50% of the area median income.

Data Collection Period: Jul 01 - Jun 30

*Upward Trend = positive result



Report Year	2022	2023	2024	2025	2026
Affordable Rental Housing					
Actual	40%	31%	64%		
Target	50%	50%	50%	50%	

How are we doing?

From July 1, 2023, through June 30, 2024, 1,557 units, or 64% of rental units approved for funding, will be affordable to households with income at or below 50% of the area median income. This is above our goal of 50%.

What factors affect our results?

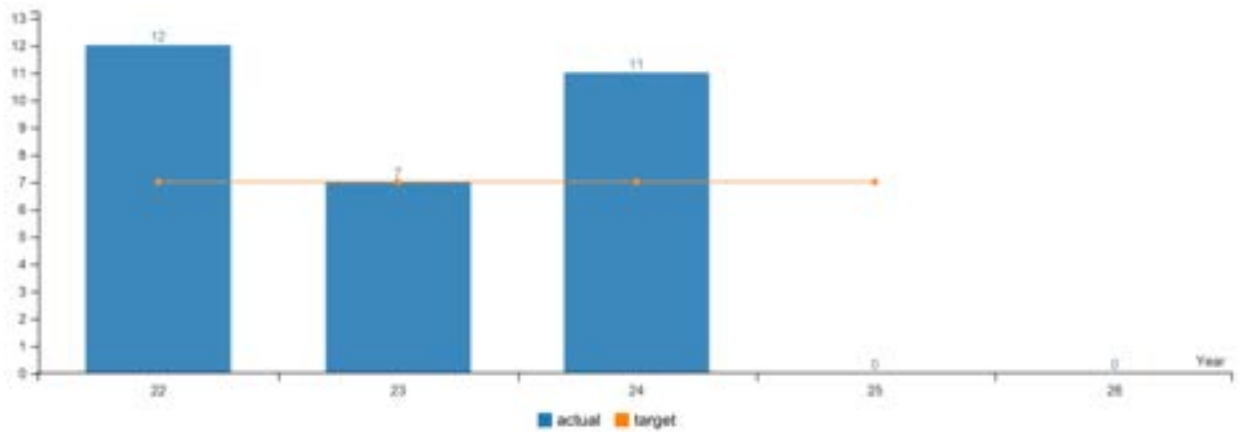
Most of our funding sources serve households earning at or below 60% of AMI, and in fiscal year 2024 several programmatic policies, including points in competitive LIFT and 9% LIHTC funding and continued investment in Permanent Supportive Housing (PSH) development for chronically homeless individuals gave further preference to serving lower incomes. As a result, we approved many projects that focused on housing for people with income at or below 50% of AMI. These figures include the rehabilitation and preservation of public housing properties in addition to other preservation and new construction of projects that include project-based rent assistance, which ensure that households only pay 30% of their income towards rent. This fiscal year, half of all units funded either preserved or created project-based assistance, which is well above the 16% of units with project-based rental assistance approved last fiscal year.

Key Performance Measure 4: Affordable Rental Housing for People with Disabilities

Percentage of affordable rental homes funded that provide rental opportunities for low-income individuals with physical or mental disabilities.

Data Collection Period: July 1 - June 30

*Upward Trend = positive result



Report Year	2022	2023	2024	2025	2026
Affordable Rental Housing					
Actual	12%	7%	11%		
Target	12%	12%	12%	12%	

How are we doing?

From July 1, 2023, through June 30, 2024, 265 units, or 11% of rental units approved for funding, will be set aside for individuals with physical, developmental, or mental disabilities. This is above our goal of 7%.



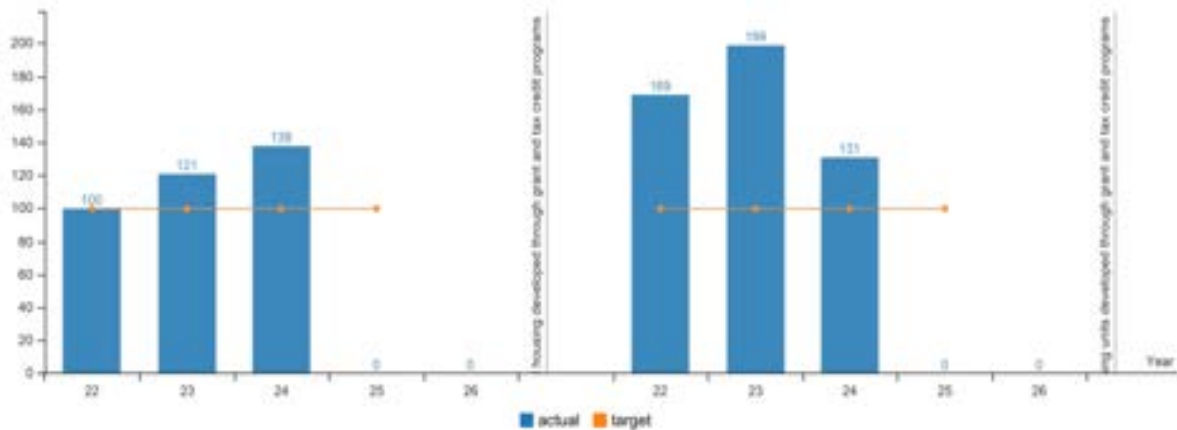
What factors affect our results?

There were several properties approved this fiscal year that set aside units for those with mental, developmental, or physical disabilities. Not reflected in these numbers are 197 additional units that will be Permanent Supportive Housing (PSH). While these units are not directly set aside for persons with disabilities, the populations they are designed to target do also have co-occurring disabilities. Everyone who is served with our PSH resources must be chronically homeless – which is a population defined both by the duration and recurrence of homelessness in addition to having co-occurring disabilities. Housing for those with disabilities like these requires intensive supportive services be provided to make the projects successful and ensure tenants remain stable within their housing. These specifically dedicated PSH resources allow us to serve these populations with more acute needs and challenges far more successfully through the PSH model. In addition, we work with our partners at Oregon Health Authority (OHA) and Oregon Department of Human Services (ODHS) for the HUD 811 Project-based Rent Assistance (PRA) program. This program is funded through a grant from the U.S. Department of Housing and Urban Development (HUD) and pays project-based rent assistance for persons who are living with a mental illness or an intellectual/developmental disability. The rent assistance is matched with services through OHA and ODHS, who are also responsible for the referral of prospective program participants.

Key Performance Measure 5: Affordable Rental Housing (Construction Costs)

Construction costs per square foot for newly constructed homes developed through grant and tax credit programs and construction costs per square foot for rehabilitated homes developed through grant and tax credit programs, as compared to national RS Means data.

Data Collection Period: July 1-June 30



Report Year	2022	2023	2024	2025	2026
a. Cost per square foot of newly built housing developed through grant and tax credit programs					
Actual	100%	121%	138%		
Target	100%	100%	100%	100%	
b. Cost per square foot for rehabilitated housing units developed through grant and tax credit programs					
Actual	169%	199%	131%		
Target	100%	100%	100%	100%	

How are we doing?

From July 1, 2023, through June 30, 2024, the average cost per square foot of new construction properties that were built during that period was \$328.73, or 138% of the combined 2023 and 2024 national average construction costs per square foot as reported by RS Means data (\$238.53). This is above the target of 100%, which is a negative result. For properties that were preserved and went through significant rehabilitation, the average cost per square foot of that rehabilitation was \$146.21, which is 131% of the combined 2023 and 2024 national average rehabilitation costs per square foot as reported by RS Means data (\$111.88). This is above the target of 100%, which is a negative result.



What factors affect our results?

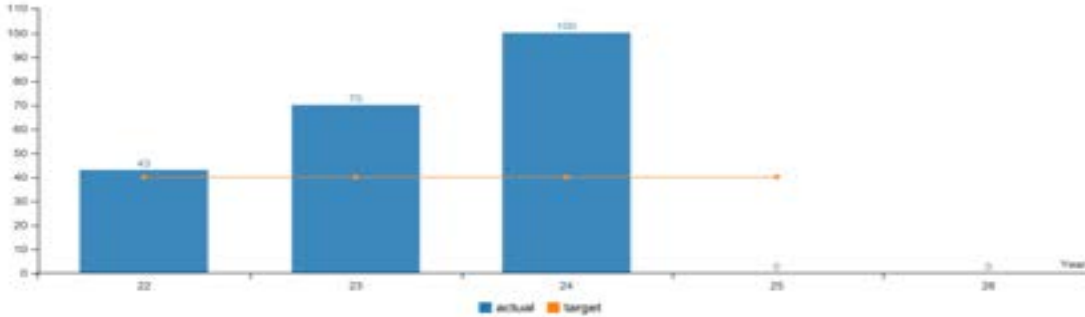
Many requirements can increase costs in the development or rehabilitation of affordable housing, including but not limited to paying workers prevailing wages, building to leadership in energy and environmental design standards, site work, design standards, the fluctuating costs and availability of materials, and locational factors. In addition, for many of our older projects needing rehabilitation, namely preservation properties, we are finding the need to invest in large systems upgrades necessary for tenant health and safety that would be less likely to have seen reflected in a normal market rehab that would be more aligned with the national average rehabilitation costs from RS Means. Furthermore, we are using national RS Means data because statewide data is not available, but Oregon construction costs tend to be higher than the national average, especially in urban areas.

Key Performance Measure 6: Affordable Rental Housing (Areas of Opportunity)

Percentage of affordable rental homes funded with 9% Low-Income Housing Tax Credits or HOME program funds that will be developed in high opportunity areas. High opportunity areas are defined as Census tracts that meet two of the following three criteria: low poverty rate, below average unemployment rate, and high ratio of jobs to labor force.

Data Collection Period: July 1 - June 30

*Upward Trend = positive result



Report Year	2022	2023	2024	2025	2026
Affordable Rental Housing					
Actual	43%	70%	100%		
Target	40%	40%	40%	40%	

How are we doing?

From July 1, 2023, through June 30, 2024, 100% of units funded with 9% Low-Income Housing Tax Credits or HOME program funds through a competitive process scored at least three out of five points in the updated location opportunity and environmental factors section of OHCS’ 2022 Qualified Allocation Plan. This is above the target of 40%.



What factors affect our results?

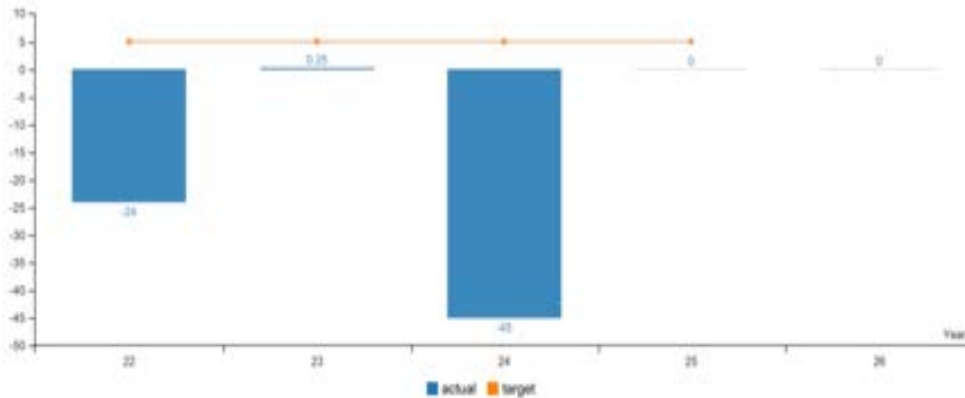
The definition of high opportunity areas provided in this KPM is no longer being used or tracked by OHCS. In 2022, the agency's Qualified Allocation Plan was updated after robust stakeholder engagement and approval by our Housing Stability Council. New construction developments can now receive up to five points in the Location Opportunity & Environmental Factors section, which includes the following criteria: one point if project is not in a USDA food desert; one point if project has access to parks and public space; one point if project is in a Census tract where 50% or more of households earned more than 100% of the area median income and the poverty rate is less than or equal to 20%; one point for access to school/education/library/workforce training; one point for projects in urban areas if in a Transit-Oriented Development or within a half mile of a fixed transit stop; or one point for projects in rural areas with access to transit options. There is also a maximum of negative two points for projects sited in Balance of State – Urban and Rural and negative three points for projects sited in Metro and Non-Metro HOME PJs that are in tracts with greater health risks due to environmental factors compared to the rest of the state, as defined by the Environmental Protection Agency's Environmental Justice Screening and Mapping Tool.

Key Performance Measure 7: Affordable Rental Housing in Rural Areas

Percent increase in the number of affordable rental homes that will be developed in rural areas. Rural areas are defined as communities with a population of 15,000 or fewer outside the Portland Urban Growth Boundary in counties within Metropolitan Statistical Areas (Benton, Clackamas, Columbia, Deschutes, Jackson, Josephine, Lane, Marion, Multnomah, Polk, Washington and Yamhill counties) and communities with 40,000 population or fewer in the balance of the state.

Data Collection Period: July 1-June 30

*Upward Trend = positive result



Report Year	2022	2023	2024	2025	2026
Affordable Rental Housing in Rural Areas					
Actual	-24%	.25%	-45%		
Target	5%	5%	5%	5%	

How are we doing?

From July 1, 2023, through June 30, 2024, 25% of rental units approved for funding were in rural areas. The number of units funded in rural areas was 1,156 in FY 2023 and decreased 45% to 631 in FY 2024. This is below the target of a 5% increase but meets the target of 25% of approved units being in rural areas.



What factors affect our results?

While we did not meet our target of a 5% increase of units funded in rural areas of the state this year, we have met our Statewide Housing Plan goal of increasing OHCS-funded housing in Oregon's rural areas by 75%. From July 1, 2014, through June 30, 2019, we had only funded 1,454 units in rural areas. The five-year period of the Statewide Housing Plan ended on June 30, 2024, and OHCS funded 5,058 units in rural areas over that time, for an increase of 248% over the prior five-year period. This shows a real commitment to reaching more rural communities throughout the state. The overall number of units funded this fiscal year decreased by 53% from the previous fiscal year, which is why the number of rural units also decreased. This decrease is primarily due to the rollout of the new application system for all OHCS funds, the Oregon Centralized Application (ORCA), which delayed the release of funds that typically would have been awarded in the first half of 2024 to later in the year.

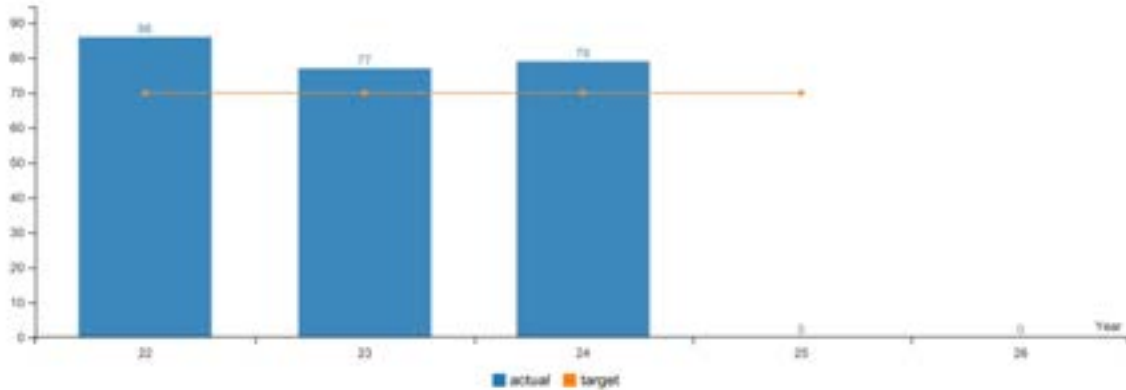
The percentage of all units funded in rural areas does remain above what it was in FY 2020 (19%), at 25%. We recommend re-establishing the target for this KPM to align with the percentage of overall units that are in rural areas. The percent of units funded in rural areas as a percent of total units funded was 19% in FY 2020, 30% in FY 2021, 24% in FY 2022, 21% in FY 2023 and now is 25% in FY 2024. Using these data points as a baseline, we would like to continue using this measurement, with a target that 25% of the funded units be in rural areas of the state.

Key Performance Measure 8: Homeownership

Percentage of households at or below the county median family income served by the Oregon Bond Residential Loan program.

Data Collection Period: July 1-June 30

*Upward Trend = positive result



Report Year	2022	2023	2024	2025	2026
Homeownership					
Actual	86%	77%	79%		
Target	70%	70%	70%	70%	

How are we doing?

From July 1, 2023, through June 30, 2024, 79% of loans made through the Oregon Bond Residential Loan program went to households at or below the county median family income. This is above our target of 70%.

What factors affect our results?

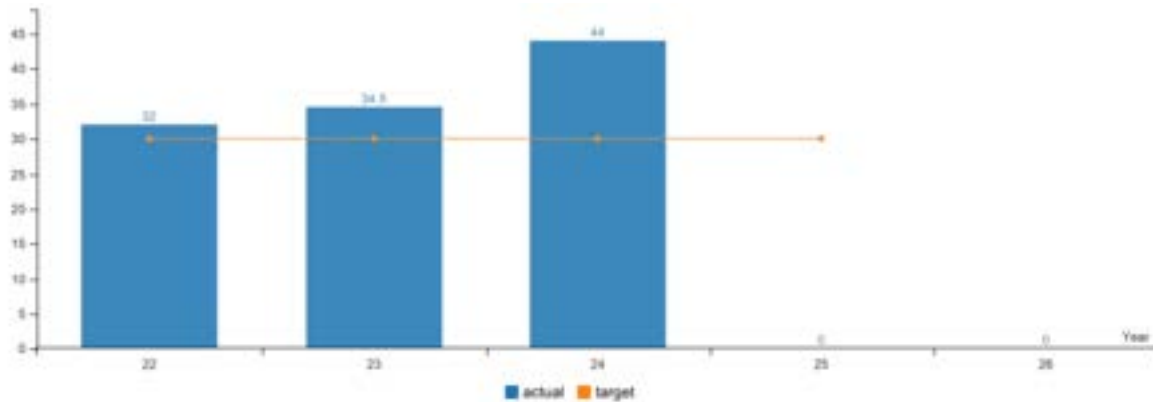
The lowest income limits OHCS uses for the bond program is 100% of statewide median family income (MFI). The statewide median family income for 2024 was \$99,200 while the county median family income ranges from \$65,800 in Malheur County up to \$116,900 in the Portland metropolitan area. The highest limit for a larger-size household is 140% of statewide MFI or 140% of county MFI, whichever is greater.

Key Performance Measure 9: Homeownership Service to People of Color

Percentage of people served by all OHCS Homeownership programs who identify as people of color.

Data Collection Period: July 1-June 30

*Upward Trend = positive result



Report Year	2022	2023	2024	2025	2026
Homeownership Services to People of Color					
Actual	32%	34.50%	44%		
Target	30%	30%	30%	30%	

How are we doing?

From July 1, 2023, through June 30, 2024, 44% of clients served by our homeownership programs were Black, Indigenous, and people of color (BIPOC). This is above our target of 30%.

What factors affect our results?

Programs such as the Home Ownership Assistance Program (HOAP), the Down Payment Assistance (DPA), and the Oregon Bond Residential Loan (OBRL) program represent a substantial proportion of our results. There were 3,206 new clients served by the HOAP program, and 49% of them identified as BIPOC. With the DPA program, 319 clients became new homeowners and 55% were people of color. In the OBRL program, 127 of the 479 loans (27%) went to first-time homebuyers who were people of color.

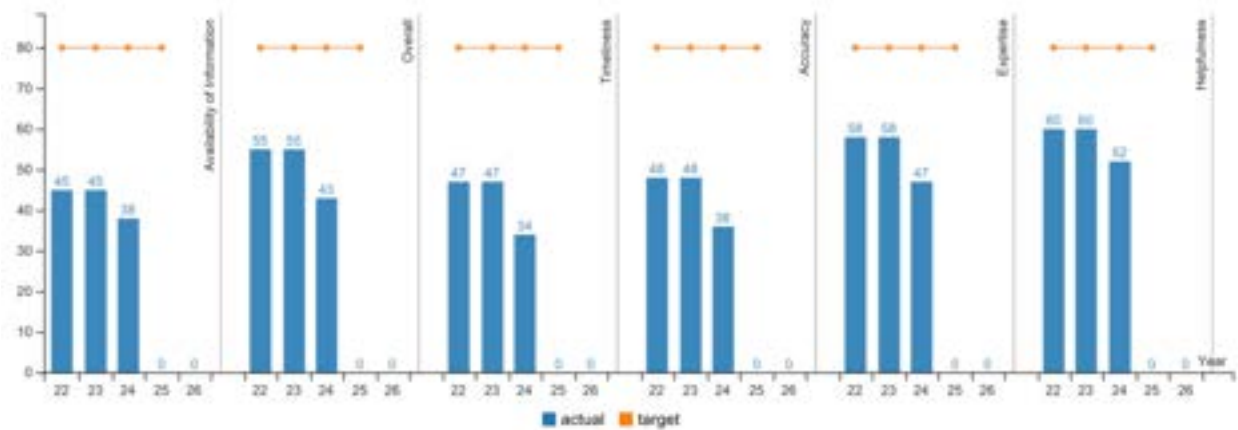
For the Homeowner Assistance Fund (HAF), 452 clients approved for assistance were BIPOC, which is 39% of the 1,148 total clients approved in the fiscal year. And lastly, in the 2024 fiscal year, Foreclosure Avoidance Counseling served 236 new clients, and 25% of them were BIPOC (59 clients).

Key Performance Measure 10: Agency Customer Service

Percentage of customers rating their satisfaction with the agency's customer service as "good" or "excellent": timeliness, accuracy, helpfulness, expertise, availability of information, overall.

Data Collection Period: Jan. 1-Dec. 31

*Upward Trend = positive result



Report Year	2022	2023	2024	2025	2026
Availability of Information					
Actual	45%	45%	38%		
Target	80%	80%	80%	80%	
Overall					
Actual	55%	55%	43%		
Target	80%	80%	80%	80%	
Timeliness					
Actual	47%	47%	34%		
Target	80%	80%	80%	80%	
Accuracy					

Actual	48%	48%	36%		
Target	80%	80%	80%	80%	
Expertise					
Actual	58%	58%	47%		
Target	80%	80%	80%	80%	
Helpfulness					
Actual	60%	60%	52%		
Target	80%	80%	80%	80%	

How are we doing?

Our 10th customer service survey, conducted in 2024, received 132 complete responses. While 43% of respondents rated the overall quality of service positively (“excellent” or “good”), this fell below our 80% target. We conduct this survey every other year.

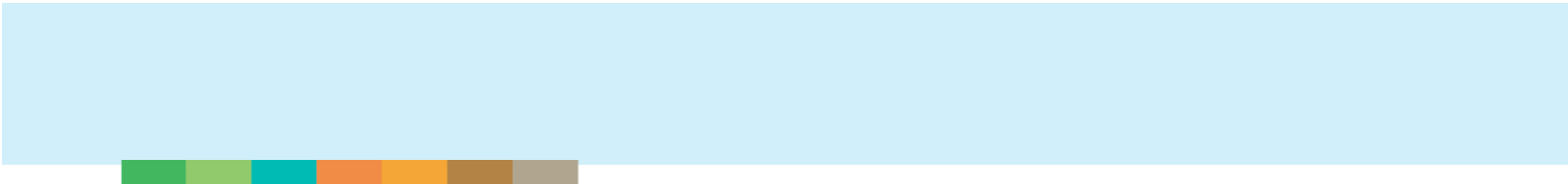
What factors affect our results?

The 2024 Customer Service Survey results were lower than the 2022 results when 55% of 77 respondents rated OHCS’ overall quality of service as “excellent” or “good,” and lower than the 2020 results when 79% of respondents rated us favorably. Many of the “poor” or “fair” ratings were attributed to a lack of satisfaction with the agency’s response to the 2020 Labor Day wildfires and straight-line winds.

OHCS works with hundreds of partners across Oregon’s housing continuum. This year, 59% of survey respondents were individual members of the public and 41% were organizations. That’s up from 28% of individuals who responded in 2022 and 10% in 2020. Although we are not a direct service provider, OHCS’ expanded role in meeting Oregon’s housing needs through implementing historic investments with new programs and initiatives has increased our visibility, attracting a broader range of respondents. Given our evolving role, we anticipate identifying new trends in customer service.

OHCS received its highest ratings for employee helpfulness (52%) and expertise (47%). The timeliness of services (34%) is the factor the survey shows OHCS needs to focus on improving the most.

We added questions to this year’s survey about communication methods to



better understand stakeholder needs and improve our practices. OHCS is also currently implementing internal strategic operation changes, including a focused effort to define our customer base better and enhance our operations to ensure greater accountability in meeting the diverse needs of our customers.

OHCS values stakeholder feedback as an essential component of government accountability and transparency. We are committed to providing excellent service and will continue to focus on improving timeliness of services, enhancing communication and outreach efforts, and strengthening community partnerships.

10% Reduction

If required, OHCS would recommend the reductions below:

1. Eliminate standard inflation on several services and supplies line-items and reduced rates for DAS and DOJ.
2. Hold OHCS positions vacant and eliminate two long-term vacancies.
3. Shift funds from General Fund to Other Funds for four positions and downward reclass one position.
4. Reduce language access budget.
5. Reduce funding for the Housing Choice Landlord Guarantee Program, the Elderly Rental Assistance Program, and Emergency Housing Assistance.

Program Area	Program Unit/ Activity Description	Impact of 15% Reduction	General Fund	Other Funds
HSD, PSH, MF, HOD, DRR, CSD, Debt	Eliminate standard inflation on several services & supplies line items and reduced rates for DAS and DOJ.	Lower assessments and hourly rates paid for DAS and DOJ price list, no impact. Elimination of inflation adjustment has unknown impact, may reduce ability to make needed purchases or hold vacancies longer.	(\$172,640)	\$0
HSD, MF, HOD, DRR, CSD, Debt	Vacancy savings	Increase in assumed savings from holding vacancies. Impact to services is unknown; unknown which positions will become vacant and whether normal recruitment timeline would balance reduction. Might require reductions / modifications to services & supplies purchases.	(\$234,940)	\$0
PSH	Permanent Supportive Housing (PSH) - Fund Shift	Shift two positions and associated services & supplies that support PSH administration to Other Funds. The shift may require an increase to charges on transactions.	(\$627,722)	\$627,722
HOD	Homeownership Development Incubator Program (HDIP) - Fund Shift	Shift two positions and associated services & supplies that support HDIP administration to Other Funds and downward reclass #1843 to a loan specialist. Charges for LIFT-HO would need to be evaluated to ensure coverage of all program costs.	(\$713,744)	\$661,197

HSD	Housing Choice Landlord Guarantee Program	Landlords who received a commitment of funds for renting to housing voucher holders may not be reimbursed for damages.	(\$337,910)	(\$337,910)
CSD	Central Services Division	Eliminate long-term vacancies: economist 2, which was held for permanent financing to support organizational assessments and FA2, which supports budget services within the organization.	(\$395,565)	\$0
HOD	Homeownership - Language Access	Reduce language access budgeted directly in HO program. No major impact anticipated.	(\$40,000)	\$0
HSD	Elderly Rental Assistance Program	About 76 elderly households will not receive assistance that would keep them in their homes.	(\$1,621,451)	\$86,864
HSD	Emergency Housing Assistance	Would leave about 2,200 households on the street or at risk of becoming homeless.	(\$4,707,040)	\$0

Budget Narrative Audit Report

<u>Audit</u>	<u>Audit #</u>	<u>Finding</u>	<u>Finding #</u>	<u>Corrective Action</u>	<u>Date Completed</u>	<u>Note from Management</u>	<u>Status to Report</u>	<u>Required</u>
2021 LIHEAP	93.568 Low- Income Home Energy Assistance Program	Ensure documentation is maintained to support amounts reported and review of reports	2021 -	The OHCS Assistant Director of Energy Services will work with the OHCS Energy Assistance Coordinator to ensure that our reporting procedures and controls include manager review of completed reports before submission and that all report support documentation is maintained	6/30/2022	The department continues to review all Federal reports internally and approved by Management for final submission. The department's control process requires a review of all Federal reports prior to submission and maintenance of documentation. Program staff submit reports to be reviewed by a manager prior to submittal by OHCS Energy Assistance Coordinator which will be supported by a LIHEAP report. Adequate controls are in place to ensure documentation is maintained to support amounts reported and reports are reviewed prior to submission.	Corrective action taken	Program and Fiscal have submitted the reports. HHS had an issue on their end and their system reporting upload was down at he time of submission. We had the information but could not submit it. They were notified we had them and they were submitted when HHS was back on-line. 11/2022.

Budget Narrative Audit Report

<p>2021 LIHEAP 93.568 Low- Income Home Energy Assistance Program</p>	<p>Establish controls to ensure information is readily available to assist in monitoring compliance requirements</p>	<p>OHCS will work with IT support to ensure critical system reports are generated timely. Additional staff are also being hired to ensure capacity exists to dedicate the necessary time to preparing GMR's</p>	<p>8/23/2023</p>	<p>Complete. Additional staff have been added and cross trained, and coordination on IT generated downloads has improved to data is obtained timely.</p>	<p>Corrective action taken</p>	<p>Additional staff have been added and cross trained, and coordination on IT generated downloads has improved to data is obtained timely.</p>
<p>2022 LIHEAP 914-2022- 04-01</p>	<p>Ensure subrecipient risk assessments and fiscal monitoring are performed and required grant information is communicated timely to subrecipients.</p>	<p>2022-32 OHCS lost critical fiscal monitoring staff and was unable to complete all risk assessments and fiscal monitoring due to this. OHCS is on track to complete fiscal monitoring and risk assessments for all subrecipients of LIHEAP in FY23. Additionally, OHCS has established vendor relationships to perform fiscal monitoring as a backup for when staff vacancies exist.</p>		<p>This has been completed from a fiscal compliance standpoint. Fiscal Compliance is currently in the process of hiring for an OPA3 that was recently vacated and for 23-25 LAB recruiting for a section manager and 2 more PA2's. Fiscal Compliance has also extended the Moss-Adams contract into 23-25 for continued monitoring, operational review of processes and back up as needed.</p>	<p>Corrective action was taken</p>	<p>Fiscal Compliance is currently in the process of hiring for an OPA3 that was recently vacated and for 23-25 LAB recruiting for a section manager and 2 more PA2's. Fiscal Compliance has also extended the Moss-Adams contract into 23-25 for continued monitoring, operational review of processes and back up as needed.</p>

Budget Narrative Audit Report

2022 LIHEAP	914-2022- 04-01	Ensure review of subrecipient request for funds verifies immediate cash needs are supported	2022-34 Strong internal controls exist and costs were eventually substantiated and allowable, however OHCS had significant staff turnover and newer staff processing these advance requests did not gather the level of detail required by OHCS to substantiate draws in a timely manner. Training has been completed for FY23.	6/30/2023	Complete. Staff have been retrained, communication has gone out to program staff and grantees to reset expectations. A monthly report is being ran to also identify if any supporting documentation is missed through the year instead at the end of the year.	corrective action was taken	Staff have been retrained, communication has gone out to program staff and grantees to reset expectations. A monthly report is being ran to also identify if any supporting documentation is missed through the year instead at the end of the year
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Budget Narrative Audit Report

2022 ESG	914-2023- 06-01	Controls are needed to ensure program expenditures are allowable.	<p>2022-18 OHCS had significant staff turnover in FY22, and that coupled with the substantively increased number of subrecipients, lead to a lack of monitoring. OHCS has subsequently hired staff and established vendor relationships to perform fiscal monitoring as a backup for when staff vacancies exist. Additionally, OHCS is on track to complete fiscal and program monitoring for all subrecipients of ESG funds in FY23</p>	<p>Fiscal has entered into contractual agreement with Moss-Adams to complete ALL monitoring of ESG funded programs for FY22 within the CAA network and FY22/FY23 for those 26 outside of the CAA network by 12/31/2023. Inhouse staff will complete FY23 Fiscal Monitoring for all within the CAA network as normally scheduled during FY24.</p>	<p>corrective action was taken</p>	<p>Fiscal has entered into contractual agreement with Moss-Adams to complete ALL monitoring of ESG funded programs for FY22 within the CAA network and FY22/FY23 for those 26 outside of the CAA network by 12/31/2023. Inhouse staff will complete FY23 Fiscal Monitoring for all within the CAA network as normally scheduled during FY24.</p>
2022 ESG	914-2023- 06-01	Documentation verifying subrecipients have not been suspended or debarred needs to be retained	<p>2022-22 Procurement will ensure documentation demonstrating subrecipients have not been suspended or debarred will be saved in the procurement file.</p>	<p>Procurement staff have been retrained on the requirement of saving documentation verifying suspension/debarment. All electronic files will have saved documentation.</p>	<p>corrective action was taken</p>	<p>Procurement staff have been retrained on the requirement of saving documentation verifying suspension/debarment. All electronic files will have saved documentation.</p>

Budget Narrative Audit Report

2022 ESG	914-2023- 06-01	Subrecipients need to be monitored to ensure compliance with procurement standards	<p>2022-24 OHCS had significant staff turnover in FY22, and that coupled with the substantively increased number of subrecipients, lead to a lack of monitoring. OHCS has subsequently hired staff and established vendor relationships to perform fiscal monitoring as a backup for when staff vacancies exist. Additionally, OHCS is on track to complete fiscal and program monitoring for all subrecipients of ESG funds in FY23.</p>	<p>Fiscal has entered into contractual agreement with Moss-Adams to complete ALL monitoring of ESG funded programs for FY22 within the CAA network and FY22/FY23 for those 26 outside of the CAA network by 12/31/2023. Inhouse staff will complete FY23 Fiscal Monitoring for all within the CAA network as normally scheduled during FY24.</p>	<p>corrective action was taken</p>	<p>Fiscal has entered into contractual agreement with Moss-Adams to complete ALL monitoring of ESG funded programs for FY22 within the CAA network and FY22/FY23 for those 26 outside of the CAA network by 12/31/2023. Inhouse staff will complete FY23 Fiscal Monitoring for all within the CAA network as normally scheduled during FY24.</p>
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Budget Narrative Audit Report

2022 ERA	914-2023- 06-02	Perform fiscal monitoring for subrecipients administrative expenditures to ensure compliance.	2022-25 OHCS had significant compliance monitoring staff turnover in FY22 which led to a lack of monitoring. OHCS has subsequently hired a contractor to perform fiscal monitoring of all ESG funded grantees. OHCS also hired staff to pre-FY22 levels, fully trained all staff and began developing internal working relationships with program staff to assure operational efficiencies. This includes an annual workshop with all grantees, internal training, and standardizations of monitoring processes.	Fiscal has entered into contractual agreement with Moss-Adams to complete ALL monitoring of ESG funded programs for FY22 within the CAA network and FY22/FY23 for those 26 outside of the CAA network by 12/31/2023. Inhouse staff will complete FY23 Fiscal Monitoring for all within the CAA network as normally scheduled during FY24.	corrective action was taken	Fiscal has entered into contractual agreement with Moss-Adams to complete ALL monitoring of ESG funded programs for FY22 within the CAA network and FY22/FY23 for those 26 outside of the CAA network by 12/31/2023. Inhouse staff will complete FY23 Fiscal Monitoring for all within the CAA network as normally scheduled during FY24.
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Budget Narrative Audit Report

2022 ERA	914-2023- 06-02	Ensure Monthly and Quarterly reports are accurate and adequately supported	2022-27	While OHCS submitted monthly and quarterly reports since program inception that include program and fiscal information, we acknowledge that there were some discrepancies between systems when one file was overridden with new information and one other file contained an error. We have taken steps to ensure data integrity and records retention moving forward and future compilations of the application tracking system data will be stored to support the point in time reconciliations and figures reported to US Treasury. One quarterly report will also be refiled if allowable by US Treasury to ensure quarterly figures reported are accurate. Data integrity	This is in progress. US Treasury has not reopened the portal to refile the quarterly report in question. Additional due diligence is being performed to ensure data files provided by Research are preserved and align with the figures on any reports filed with US Treasury.	corrective action was taken
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Budget Narrative Audit Report

2022 ESG	914-2023- 06-01	Controls are needed to ensure subrecipients' compliance with equipment and real property requirements.	2022-19 OHCS has instituted a procedure for State FY23 which is on track to be completed for all ESG recipients; this procedure currently includes a notification and approval process for the tracking of the acquisition, rehabilitation, renovation, or conversion of property and separately a vehicle purchase and equipment purchase. We are in the process of refining a control system to ensure adequate safeguards are in place to prevent loss, damage, or theft. Additionally, we are reviewing our maintenance procedures to ensure properties are in good condition	Program Compliance Team has added questions to agency questionnaire verify agency's policy and procedures for the security, maintenance, and accountability for assets, and specifically asks for the documentation surrounding any items in excess of \$5,000 purchased during the monitoring period. This questionnaire is sent out to agencies during monitoring and is used as part of the desk review process.	Partial corrective action was taken	Vehicle Purchase Request, Equipment Purchase Request, and Equipment/Vehicle Disposition Request Forms have been created. We are in the process of updating our guidance to enforce this requirement.
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Budget Narrative Audit Report

2022 ESG	914-2023- 06-01	Controls are needed to ensure buildings renovated for use as emergency homeless shelters are maintained as shelters for the period required.	2022-20 Program monitoring for all ESG recipients is on track to be completed for State FY23. Our program manuals state the restrictive use period requirements for any rehabilitation, renovation, conversion, or maintenance of real property. OHCS' program manuals clearly define and outline the requirements for approval of acquisition-renovation-rehabilitation, expectations regarding restrictive use periods based on project type, as well as a requirement for an annual certificate of continuing program compliance. The continuing program compliance requirement allows subrecipients to self-certify that a property is meeting the required restrictive use	6/30/2023	Program Compliance Team has added questions to agency questionnaire determine whether or not a property was purchased or renovated using program funds during the monitoring period. Agencies using program funds to operate a shelter or day center are expected to provide fire safety, security, and health inspection documentation as applicable. Program compliance team is currently working with a contractor to develop more robust policies and procedures for monitoring for future monitoring.	Corrective action was taken	Monitoring has added this to the Program Compliance Checklist to ensure restrictive use period is being adhered to based on program guidance.
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Budget Narrative Audit Report

2022 ESG	914-2023- 06-01	Controls are needed to ensure compliance with level of effort requirements	2022-21 Level of Effort monitoring is part of program monitoring for State FY23 which is on track to be completed for all ESG recipients. OHCS is in the process of designing a self-certification form for subrecipients to acknowledge and agree to the compliance requirements in which funds may not be used to replace funds the local government provided for street outreach and emergency shelter services.	Add this to the Program Compliance Check-list. Program compliance doesn't review budgets. If there is a self-certification form required, then Program can see if they submitted this information.	Partial corrective action was taken	Monitoring has added this to the Program Compliance Checklist to ensure adherence to self-certification. Self-certification form is entering final stages of review.
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Budget Narrative Audit Report

2022 Corona virus State and Local Fiscal Recovery Funds	914-2023-05-01	Comply with subrecipient monitoring requirements	<p>2022-31 OHCS performed appropriate due diligence in determining whether organization was a subrecipient or vendor. Internally OHCS identified the issue of how to classify the organization and used all resources available to make the determination. The result of the due diligence and discussion was that OHCS determined the organization should be classified as a vendor, not a subrecipient. OHCS will review and strengthen the current process for determination.</p>	4/5/2024	OHCS Central Services Division will develop a process on internal roles/responsibilities of determining subrecipient vs. vendor relationship.	Corrective action was taken	OHCS Central Services Division will develop a process on internal roles/responsibilities of determining subrecipient vs. vendor relationship.
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2022 LIHEAP	914-2022- 04-01	Ensure financial reports are submitted.	2022-33	OHCS submitted 2 of the 4 required reports but was unable to submit the remainder due to technical issues with the federal reporting system. OHCS compiled all requisite reporting information timely and is in correspondence with the federal funder to enable report submission.	This is still in progress. Efforts continue for staff to obtain the correct access to file older reports.	Partial corrective action was taken
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Budget Narrative Audit Report

2022 ESG	914-2023- 06-01	Controls need to be strengthened to ensure the required expenditures are spent timely	2022-23 OHCS did reach out to HUD and requested an extension of the obligation deadline, however, did not receive direct approval. Going forward, OHCS will ensure grant management reports and time-bound expenditure plans are consistently maintained and followed for all OHCS grants and grantees. In addition, OHCS will perform due diligence and ensure follow-up occurs when needed and documentation is retained to support our efforts.	This is in progress. Additional positions are being filled to expand capacity to support timely tracking. We're also working with program to ensure spenddown plans exist and are supported/followed, and resources exist within programmatic areas as well to support this effort.	No further action warranted
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Budget Narrative Audit Report

2022 ERA	914-2023- 06-02	Ensure accessible documentation to evidence compliance with program requirements	<p>2022-29 OHCS had significant compliance monitoring staff turnover in FY22 leading to incomplete subrecipient monitoring reviews. OHCS completing these reviews would've ensured subrecipients had adequate time to produce necessary documentation to evaluate compliance, or if not, subrecipients would've been required to take corrective actions. For fiscal compliance, OHCS hired a contractor to perform fiscal monitoring of federal funded Grantees. OHCS also hired fiscal staff to pre-FY22 levels, fully trained them, conducted coordinated working sessions, and reached out to the CAA network for discussions on improving processes. OHCS continues to work with the</p>	corrective action was taken
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Budget Narrative Audit Report

2022 ERA	914-2023- 06-02	Implement program monitoring over client assistance payments to ensure compliance	<p>Lack of staff significantly limited our ability to perform the necessary monitoring. An additional contractor was brought on to monitor the work of our vendor in February of 2022. The contractor continued to provide program compliance support to OHCS through the end of January 2023. This contractor was also engaged in other projects and activities as needed during their contract term. The largest workload was investigating payments or cases that were identified as potentially non-compliant. All these cases were researched extensively, and findings were identified, and corrective action and collection activities were started if needed. Out of</p>	<p>was implemented in the spring of 2023 and our documented policies and procedures continue to be updated and improved. Each review requires a 30 day notice and sample size is dependent on the total number of processed and paid applications. Initially, the CAA programs were to be reviewed and finalized. Multiple reviews were scheduled but unfortunately had to be suspended or rescheduled due to the nearing contract end date for PPL. To date, the four required federal reports for PPL have been completed (OERAP 1 and 2, FY 22 and FY23 each). It is important to note, each review has not yet been closed as the PPL response time is still open. A payment recapture process specific to program compliance</p>	Corrective Action was taken
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Budget Narrative Audit Report

2022 ERA	914-2023- 06-02	Ensure Federal Funding Accountability and Transparency Act reporting is completed	2022-28 OHCS has attempted multiple times to submit the FFATA, however the award was never made available to report on within the system. OHCS has also reached out to US Treasury multiple times to confirm that we were not required to report but have yet to hear directly from US Treasury. OHCS was able to confirm and received a response from US Treasury that went to another state that grantees were not required to complete the FFATA on the federal reporting website as US Treasury was doing that on behalf of the recipient, and OHCS did share that correspondence with SOS. Although US Treasury has been nonresponsive, OHCS will continue to attempt to	Still in progress.	Partial corrective action was taken	Update 7/12/24: US Treasury is not responding to our requests. SOS wants a letter directly to us, and not another state agency which is what we have. Waiting to see if this will fall off the FY24 report.
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Budget Narrative Audit Report

2022 ERA	914-2023- 06-02	Ensure controls over administrative expenditure limits are properly designed and sufficiently detailed to ensure compliance	2022-30	<p>This was a very fast-paced, complex award with multiple layers of funding. OHCS did have and continues to have a pulse on administrative costs from the various admin funding sources and has not exceeded those allowable limits. Reporting was routinely compiled to show the various allocations and expenditures to date, which included administrative costs. Reporting was not provided in a consistent manner as information from multiple systems was needed, however program and fiscal staff met regularly to review. OHCS is taking careful steps to design a system that will consistently track awards while ensuring spending is</p>	<p>This is in progress. A budget to actuals tool is in development to provide sustainable tracking and reporting on administrative expenditures for all programs.</p>	<p>corrective action was taken</p>	<p>This is in progress. A budget to actuals tool is in development to provide sustainable tracking and reporting on administrative expenditures for all programs.</p>
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Budget Narrative Audit Report

2023 LIHEAP	914-2024- 04-01	Ensure review of federal cash draws are adequately documented to support the draws are for the immediate cash needs of the program	2023-17	<p>Additional training has been provided to new team members, to ensure adequate documentation exists to support immediate cash needs. Two-step verification of all draws is also required. Refresher training has been provided to staff to ensure oversight is in place at all times. The funds inadvertently drawn were corrected the first week of March 2024.</p>	Corrective action was taken. AW240940	Staff have been retrained, and reconciliations are completed timely to ensure accuracy and oversight of draws.
2023 LIHEAP	914-2024- 04-01	Ensure the Grant Management Report control is performed and documented	2023-18		Corrective action was taken.	A dedicated staff resource has been trained and has brought grant reconciliations and reporting current. Additional training has been provided for awareness of the earmarking and obligation requirements as well.

Budget Narrative Audit Report

2023 LIHEAP	914-2024- 04-01	Ensure documentation is retained to support amounts reported	2023-19		Corrective action was taken.	Staff have received training and documentation is now retained consistently to support reported figures.
2023 ESG	914-2024- 04-03	Fully implement controls to ensure subrecipients are in compliance with program requirements	2023-15	OHCS has hired an outside contractor to complete the requested work. Contractor was not in place in time to complete action prior to end of audit work, however work will be finalized prior to the end of the current fiscal year.	Corrective action was taken.	

Budget Narrative Audit Report

2023 ESG	914-2024- 04-03	Verification that subrecipients have not been suspended or debarred needs to be retained	2023-16	Since the original findings in 2022, we have added the SAM check as a mandatory review activity in our agreement trackers, and have provided training and guidance as to the retention of the screenshots of the SAM check as of 6/30/2023. As we have experienced some additional staff turnover since then, we will reiterate that guidance; document the requirement in a team procedure; and provide a refresher as to the necessity of this document retention on a recurring basis. This will currently be in the Procurement Administrative files but is subject to change as there is a project in motion at OHCS for a Grant Management System that	corrective action was taken
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Budget Narrative Audit Report

2023 ERA	914-2024- 04-02	Obtain documentation to support expenditures or pursue cost recovery	OHCS is in the process of coordinating with agencies and contractor to resolve any outstanding compliance concerns. Expenses may be considered mitigated if documentation to support the questioned cost is obtained, or if agency is able to clarify policy and procedure to support existing documentation. If expenditure is not resolved and is identified as non- compliant with federal requirements, OHCS may pursue cost recovery. Anticipated completion date is 90 days. *NOTE for OHCS only :This is considering response and review times for open reports and if we need to issue a notice to cure, creating that invoice and sending it with standard	Partial corrective action was taken
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PROPOSED SUPERVISORY SPAN OF CONTROL REPORT

In accordance with the requirements of ORS 291.227, presents this report to the Joint Ways and Means Committee regarding the agency's Proposed Maximum Supervisory Ratio (MSR) for the 20 - 20 biennium.

Supervisory Ratio for the 20 - 20 biennium

The agency's actual supervisory ratio as of: is 1:
 (Date) (Enter ratio from last published DAS CHRO Supervisory Ratio)

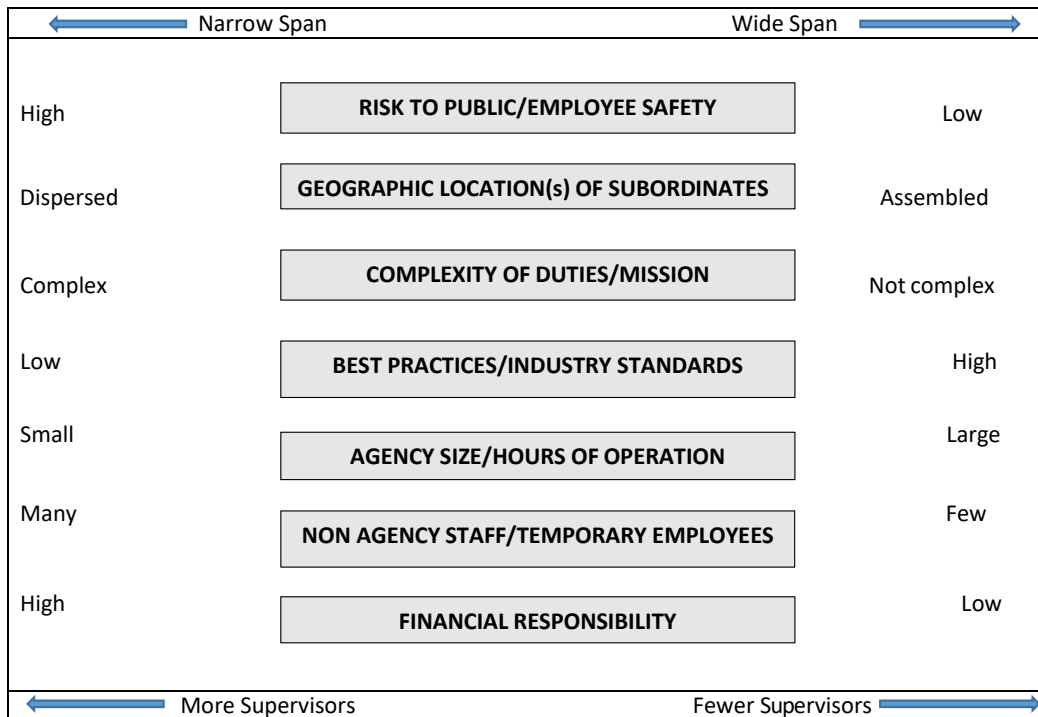
The agency actual supervisory ratio is calculated using the following calculation:

<input type="text"/> (Total supervisors)	=	<input type="text"/> (Employees in a supervisory role)	+	<input type="text"/> (Vacancies that if filled would perform in supervisory role)	- 1	(Agency Head)
<input type="text"/> (Total non-supervisors)	=	<input type="text"/> (Employees in a non-supervisory role)	+	<input type="text"/> (Vacancies that if filled would perform a non-supervisory role)		

The Agency has a current actual supervisory ratio of:

1 : = /
 (Actual Span of Control) (Total non-supervisors) (Total Supervisors)

When determining an agency maximum supervisory ratio, all agencies begin with a baseline supervisory ratio of 1:11 and based upon some or all of the following factors, may adjust the ratio up or down to fit the needs of the agency.





PROPOSED SUPERVISORY SPAN OF CONTROL REPORT

Please answer the following questions:

1. Is safety of the public or of state employees a factor to be considered in determining the agency maximum supervisory ratio? Yes No

Explain how and why this factor impacts the agency maximum supervisory ratio upward or downward from 1:11.

2. Is geographical location of the agency's employees a factor to be considered in determining the agency maximum supervisory ratio? Yes No

Explain how and why this factor impacts the agency maximum supervisory ratio upward or downward from 1:11.

3. Is the complexity of the agency's duties a factor to be considered in determining the agency maximum supervisory ratio? Yes No

Explain how and why this factor impacts the agency maximum supervisory ratio upward or downward from 1:11.

4. Are there industry best practices and standards that should be a factor when determining the agency maximum supervisory ratio? Yes No

Explain how and why this factor impacts the agency maximum supervisory ratio upward or downward from 1:11.



PROPOSED SUPERVISORY SPAN OF CONTROL REPORT

5. Is size and hours of operation of the agency a factor to be considered in determining the agency maximum supervisory Yes No

Explain how and why this factor impacts the agency maximum supervisory ratio upward or downward from 1:11.

6. Are there unique personnel needs of the agency, including the agency's use of volunteers or seasonal or temporary employees, or exercise of supervisory authority by agency supervisory employees over personnel who are not agency employees a factor to be considered in determining the agency maximum supervisory ratio? Yes No

Explain how and why this factor impacts the agency maximum supervisory ratio upward or downward from 1:11.

7. Is the financial scope and responsibility of the agency a factor to be considered in determining the agency maximum supervisory ratio? Yes No

Explain how and why this factor impacts the agency maximum supervisory ratio upward or downward from 1:11.

Based upon the described factors above the agency proposes a maximum supervisory ratio of 1:

Unions requiring notification:

Date unions notified:

Submitted by: Date:

Signature: Date:

Signature: Date:

Signature: Date:

Signature: Date:

BUDGET NARRATIVE

Program Prioritization for 2025-27

Agency Name: Housing and Community Services Department		Agency Number: 91400																					
2025-27 Biennium		Agency-wide																					
Program/Division Priorities for 2025-27 Biennium																							
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22		
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program-Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (for C, FM, and FO Only)	Comments on Proposed Changes to CSL Included in Agency Request			
Agcy	Prgm/Div																						
1	1	OHCS	ARH	Affordable Rental Housing Programs	91400-03 91400-04 91400-05 91400-06	12	2,878,963	0	279,838,173	400,000	39,414,224	0	\$ 322,531,360	92	92.00	Y	N	FO, S	ORS 317.097; ORS 446.515-446.547; ORS 456.502-456.725; ORS 458.380-458.740; ORS 566.340; 42 USC 12724; 2008 HERA; IRS Section 42;	Awarding Low Income Housing Tax Credits to developers; administering housing development grants and loans; ensuring compliance with program rules and laws, financial stability, and health and safety standards.	Resources for Predevelopment, Preservation, Rental Development for Lift. The Land Acquisition Program, CARE, Culturally Responsive Property Management and SDC's. Operational Support including Information Services Support.		
2	1	OHCS	CC	Capital Construction	91400-03 91400-04 91400-05	12	0	0	0	0	0	0	\$ -	0	0.00	Y	N	S	ORS 458.485		Requests additional XI-Q bond proceeds for Rental Development for LIFT and PSH. PSH Risk Mitigation, Homeownership Development, Preservation, for Expiring and Financial Needs. Preservation for Manufactured Parks. CARE and Manufactured Home Replacement Program.		
3	1	OHCS	PSH	Permanent Supportive Housing Rent Assistance		12	23,696,977	0	0	0	0	0	\$ 23,696,977	2	2.00	Y	N				Resources for PSH CSL Improvements. Expansion of PSH Rental Assistance & Services. PSH Risk Mitigation. Supportive Housing. Rental Development for PSH. Operational Support including Information Services Support.		
4	1	OHCS	HSD	Homeless Services	91400-01	12	48,247,046	0	30,334,666	0	19,965,420	0	\$ 98,547,134	29	29.00	Y	Y	FO, S	ORS 456.265; ORS 456.375-456.390; ORS 456.555; ORS 456.607-456.609; ORS 458.365-458.377; ORS 458.620, 458.650, 458.677; 458.700; 42 USC 7, 9901-9926, 11317-11378, 12725	Administering grants to alleviate poverty and homelessness.	Maintaining Shelters, Sustaining Re-Housing & Long Term Rental Assistance. Continuing to Prevent Evictions Infrastructure. Maintaining Tribal Homelessness Investments and Tribal Housing Block Grants. Operation Support including Information Technology support. Resources for Supportive Housing. Expanding Shelters, Transitional and Re-housing. Expansion of the IDA program.		
5	1	OHCS	HO	Homeownership Programs	91400-07 91400-08	12	3,330,447	0	18,283,957	0	926,154	0	\$ 22,540,558	21	21.00	Y	N	FO, S	ORS 456; P.L. 111-203	Administering grants to stabilize neighborhoods.	Requests funding for Homeownership Assistance Fund, LIFT and HDIP. Resources for Preservation Expiring + Physical and Financial Needs. Preservation. Down payment assistance for CROs. Down Payment Assistance paired with lending. Foreclosure Avoidance Counseling. Resources for SDC's. Operation support including support for information services.		
6	2	OHCS	HSD	Energy Services	91400-02	12	336,381	0	95,765,916	0	95,214,311	0	\$ 191,316,608	18	18.00	Y	Y	FO, S	ORS 456.594-456.599; ORS 468.421; ORS 757.612; 24 USC 6833, 8621-8630	Administering grants to alleviate energy expenses.	Package 508 includes 2 positions to support Federal Fund weatherization program.		
7	2	OHCS	PBCA	Performance Based Contract Admin		12	0	0	5,839,862	0	1,120,571	185,102,399	\$ 192,062,832	21	20.50	Y	N	FO	Title 42 Section 8 section 14371	Rent subsidy payments to landlords/owners of Section 8 (Housing Choice) units.	Culturally Responsive Property Management.		
8	2	OHCS	HO	Manufactured Homes and Parks Programs		12	761,380	0	1,754,541	0	0	0	\$ 2,515,921	5	5.00	Y	N	S			Funding for preservation of manufactured parks.		
9	1	OHCS	DRR	Disaster Recovery & Resiliency		12	1,075,072	0	690,278	0	3,872,294	0	\$ 5,637,644	13	13.00	Y	N	FO			Limitation for Disaster Recovery & Resiliency Operation support including Information Service support.		
10	3	OHCS	HO	TANF Programs			0	0	5,338,662	0	168,542	0	\$ 5,507,204	1	1.00								
11	2	OHCS	ARH	Asset Management & Compliance			240		13,962,708	0	177,136		\$ 14,140,084	47	47.00	Y							
N/A	N/A	OHCS	CSD	Central Services	91400-09	4	7,638,576	0	45,244,514	0	6,033,646	0	\$ 58,916,736	143	143.00	N	N						
N/A	N/A	OHCS	DM	Bond Activities and Debt Service		4	231,475,439	40,500,992	6,721,380	698,023,568	0	0	0	\$ 976,721,379	10	10.00	Y	N	D		Requesting additional positions support for the agency. Additional S&S, DS for issuing XI-Q bonds and lottery bonds.		
						319,440,521	40,500,992	503,774,659	698,423,568	166,892,298	185,102,399	\$ 1,914,134,437	402	401.50									

Within each Program/Division area, prioritize each Budget Program Unit (Activities) by detail budget level in ORBITS

Document criteria used to prioritize activities:
 Self-Sustaining (weight = 20%) Program funds both direct and indirect admin costs
 Scale: 1 = Not Effective

- 7. Primary Purpose Program/Activity Exists**
- 1 Civil Justice
 - 2 Community Development
 - 3 Consumer Protection
 - 4 Administrative Function
 - 5 Criminal Justice
 - 7 Education & Skill Development
 - 8 Emergency Services
 - 9 Environmental Protection
 - 10 Public Health
 - 11 Recreation, Heritage, or Cultural

- 19. Legal Requirement Code**
- C Constitutional
 - D Debt Service
 - FM Federal - Mandatory
 - FO Federal - Optional (once you choose to participate, certain requirements exist)
 - S Statutory

BUDGET NARRATIVE

Policy Group	Agency Name	IT Project Name	PPM Idea/ Project ID	PPM Idea/Project Name	Mandate	Short Description	Start Date	End Date	Policy Option Package Request (Y/N)	POP #	Total Budget \$ (PPM)	Total Cost	Previous Biennium (2023 -2025) GF Cost	Previous Biennium (2023 -2025) OF Cost	Previous Biennium (2023 -2025) LF Cost	Previous Biennium (2023 -2025) FF Cost	Current Biennium (2025-2027) GF Cost	Current Biennium (2025-2027) OF Cost	Current Biennium (2025-2027) LF Cost	Current Biennium (2025-2027) FF Cost	Future Biennia (2027 - and ongoing) GF Cost	Future Biennia (2027 - and ongoing) OF Cost	Future Biennia (2027 - and ongoing) LF Cost	Future Biennia (2027 - and ongoing) FF Cost
Transportation and Economic Development	OHCS	Grants Management	Transportation and Economic Development	OHCS	Grants Management	This project will provide a single solution to administer grants from application to review and award; it will improve reporting and facilitate better data for analysis, increase productivity and reliability, and result in a unified user experience for both staff and applicants.	2024-03-01	2025-05-01	Yes	509	\$ 1,015,000	\$ 1,015,000	\$ -	\$ -	\$ -	\$ -	\$ 115,000	\$ -	\$ -	\$ -	\$ 900,000	\$ -	\$ -	\$ -
Transportation and Economic Development	OHCS	Customer Relationship Management	Transportation and Economic Development	OHCS	Customer Relationship Management	Implementation of a Customer Relationship Management system allowing for: Improved engagement with partners, unified recordkeeping and service for staff, and data for continuous improvement efforts; culminating enhanced service to the community and constituents of OHCS.	2024-05-01	2027-12-31	Yes	509	\$ 2,000,000	\$ 1,250,000					\$ 1,250,000							
Transportation and Economic Development	OHCS	ProLink HFA	Transportation and Economic Development	OHCS	ProLink HFA	ProLink HFA is the established data system of record for the Affordable Rental Housing Division. The plan is to keep this system in full use while supporting improved functionality of ProLink HFA. This requires implementing needed system enhancements that will improve the user experience and data quality overall. This package will allow OHCS to continue the use of the ARH data systems and continue to address the challenges associated with delivering funds and monitoring partner performance while ensuring data integrity. The growing scale of funds delivery for affordable rental housing requires the maintenance and enhancement of our established data systems. This includes covering the known annual costs, intentional planning for known needed system enhancements and preparation for contingencies that may arise.	2025-01-01	2027-12-31	Yes	509		\$ 3,415,690								\$ 2,184,476				\$ 1,231,214

Oregon Housing and Community Services (OHCS)
2025-27 Biennium

Long-term vacancies (12 months or more) as of December 31, 2024

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21		
Agency	SCR	DCR	Pos No	Position Class Comp		Position Title	Pos Type	GF Fund Split	LF Fund Split	OF Fund Split	FF Fund Split	FTE	2025-27 GF PS Total	2025-27 LF PS Total	2025-27 OF PS Total	2025-27 FF PS Total	2025-27 Total Bien PS BUDGET	Vacant Date	Position eliminated in GRB? Y/N	Reason for vacancy		
914	070	11	0001805	OAS	C1117	Research Analyst 3	PF	0.13	0.00	0.77	0.10	1.00	29,553	0	175,043	22,733	227,329	N/A	N	Held to support organizational assessments and future financing.		
914	070	11	0002004	OAS	C1162	Economist 2	PF	1.00	0.00	0.00	0.00	0.50	103,035	0	0	0	103,035	N/A	Y - parital	GRB reduced to 0.5 FTE and remaining 0.5 FTE would be abolished as part of a pending PFP.		
914	010	02	0000958	MMN	X0863	Program Analyst 4	PF	0.19	0.00	0.00	0.81	1.00	55,771	0	0	242,472	298,243	8/14/2023	N	Internal promotion of incumbent; to recruit pending final organizational assessment.		
914	070	04	0001379	OAS	C1244	Fiscal Analyst 2	PF	0.00	0.00	0.70	0.30	1.00	-	-	165,202	70,801	236,003	8/14/2023	N	Held to support organizational assessments and future financing.		
914	070	80	0001570	MMN	X0872	Operations & Policy Analyst 3	PF	0.40	0.00	0.60	0.00	1.00	114,452	-	171,678	-	286,130	10/10/2022	N	Reclassified to an HRA2, filled on 1/6/25		
914	070	11	0001602	OAS	C0872	Operations & Policy Analyst 3	PF	0.00	0.00	1.00	0.00	1.00	-	-	265,775	-	265,775	8/11/2021	N	Reclassified to a Racial Equity Research Analyst (A3), REQ-169864, Candidate in reference check		
914	040	01	0001791	OAS	C0872	Operations & Policy Analyst 3	PF	0.00	0.00	1.00	0.00	1.00	-	-	265,775	-	265,775	N/A	N	Held to support organizational assessments and future financing.		
914	040	01	0001766	OAS	C0862	Program Analyst 3	PF	0.00	0.00	0.00	0.00	-	-	-	-	-	-	N/A	Y	Phased-out (Pkg 022).		
914	040	01	0001843	OAS	C0862	Program Analyst 3	PF	0.00	0.00	1.00	0.00	1.00	-	-	255,242	-	255,242	7/17/2023	N	Reclassified to a LS1, candidate to start on 1/21/25. GRB shifts funding to OF from GF in Pkg 090.		
914	060	01	0001889	MMS	X7324	Grants, Loans, and Programs Manager 2	PF	0.00	0.00	0.00	1.00	1.00	-	-	-	310,760	310,760	N/A	N	Reclassified to a GLPM2 from PE/M E, REQ-172184, candidates are being screened		
914	070	04	0002019	OAS	C0437	Procurement & Contract Specialist 2	PF	0.00	0.00	0.00	0.00	-	-	-	-	-	-	N/A	Y	Phased-out (Pkg 022). Not restored in Pkg 508.		
914	070	04	0002026	OAS	C0437	Procurement & Contract Specialist 2	PF	0.00	0.00	0.00	0.00	-	-	-	-	-	-	N/A	Y	Phased-out (Pkg 022). Not restored in Pkg 508.		
914	070	04	0002018	OAS	C0438	Procurement & Contract Specialist 3	PF	0.00	0.00	0.00	0.00	-	-	-	-	-	-	N/A	Y	Phased-out (Pkg 022). Not restored in Pkg 508.		
914	025	01	0001944	OAS	C0861	Program Analyst 2	PF	0.00	0.00	1.00	0.00	1.00	-	-	236,003	-	236,003	N/A	N	Held to support organizational assessments and future financing.		
914	070	04	0001938	OAS	C1218	Accountant 3	PF	0.00	0.00	0.60	0.40	1.00	-	-	159,465	106,310	265,775	N/A	N	Section experienced turnover in multiple positions. In the process of filling positions and on boarding new staff.		
914	070	08	0002072	MMN	X1338	Learning & Development Specialist 1	PF	0.00	0.00	1.00	0.00	1.00	-	-	224,911	-	224,911	N/A	N	Held to support organizational assessments and future financing.		
914	030	01	0002044	OAS	C3268	Construction Project Manager 2	PF	0.00	0.00	1.00	0.00	1.00	-	-	265,775	-	265,775	N/A	N	To be abolished as part of pending PFP.		
914	080	06	0001940	OAS	C1245	Fiscal Analyst 3	PF	0.00	0.00	1.00	0.00	1.00	-	-	265,775	-	265,775	N/A	N	Held to support organizational assessments and future financing.		
TOTAL								1.72	0.00	9.67	2.61	13.50	302,811	0	2,450,644	753,076	3,506,531					

(a) Other Fund Type	(b) Program Area (SCR)	(c) Treasury Fund #/Name	(d) Category/Description	(e) Constitutional and/or Statutory Reference	(f) (g) 2023-25 Ending Balance		(h) (i) 2025-27 Ending Balance		(j) Comments: Significant changes from what was reported in the 20203 session for 23-25 ending balances.
					In LAB	Revised	In CSL	Revised	
Limited	010 Housing Stabilization Programs	00401 OTHER FUNDS ACCOUNT (Multiple programs)	Operations	ORS 456.574	1	2,755,450	0	406,964	Spending is projected slower than anticipated in 23-25. In this SCR, programs include Individual Development Account administration, Housing Stabilization Program, Barclays Bank energy settlement, and others.
Limited	010 Housing Stabilization Programs	00615 EMERGENCY HOUSING ACCOUNT	GRANT FUND	ORS 458.650	413,332	8,053,239	0	0	Not a significant change from what was reported for 2023 session.
Limited	010 Housing Stabilization Programs	00897 LOW-INCOME ELECTRIC BILL PYMT ASSISTANCE	GRANT FUND	ORS 456.587	2,266,030	8,250,600	21,451,943	21,661,458	Revenues are projected to be higher than previously reported.
Limited	010 Housing Stabilization Programs	00898 ELECTRICITY PUBLIC PURPOSE CHARGE (ECHO)	GRANT FUND	ORS 456.587	2,003,950	34,852,098	7,158,532	27,297,129	Beginning balances are higher than previously projected due to slow spending in 21-23. Revenues are projected to be higher in 23-25. Spending is projected to be slower than previously projected.
Limited	010 Housing Stabilization Programs	00898 ELECTRICITY PUBLIC PURPOSE CHARGE (OMEP)	GRANT FUND	ORS 456.587	11	2,246,843	10,856,222	5,079,337	Spending in 23-25 projected to be higher than expected.
Limited	010 Housing Stabilization Programs	01507 HOUSING CHOICE LANDLORD GUARANTEE PGM FD	GRANT FUND	ORS 456.385	277,244	2,922,675	0	3,361,539	Spending is projected slower than anticipated in 23-25.
Limited	010 Housing Stabilization Programs	01546 WILDFIRE DAMAGE HOUSING RELIEF ACCOUNT	GRANT FUND	ORS 458.317	0	227,937	0	227,937	Not a significant change from what was reported for 2023 session.
Limited	010 Housing Stabilization Programs	01792 OIL-HEATED DWELLINGS ENERGY ACCOUNT	GRANT FUND	ORS 456.597	553	531,341	0	210,094	Not a significant change from what was reported for 2023 session.
Limited	010 Housing Stabilization Programs	01795 RENT GUARANTEE PROGRAM FUND	GRANT FUND	ORS 456.609	4,659	189,118	0	94,769	Not a significant change from what was reported for 2023 session.
Limited	010 Housing Stabilization Programs	02131 LONG-TERM RENT ASSISTANCE FUND	GRANT FUND	ORS 458.392	0	735,668	0	735,668	Spending projected to be slower than anticipated for 23-25.
Limited	025 Project-Based Rental Assistance	00401 OTHER FUNDS - PROJECT-BASED RENTAL ASSISTANCE PROGRAMS	Operations	ORS 456.576	2,991,955	738,339	4,891,810	0	Spending projected to be higher than anticipated for 2023-25.
Limited	025 Project-Based Rental Assistance	01343 GENERAL HOUSING ACCOUNT		ORS 456.665		3,997,600	0	3,997,600	Risk mitigation - no claims paid as of February 2025. New, not previously reported.
Limited	030 Multifamily Rental Housing Programs	00401 OTHER FUNDS - AFFORDABLE RENTAL HOUSING PROGRAMS	Operations	ORS 456.574	277,959	3,480	4,490,651	0	Spending in 23-25 projected to be higher than expected.
Limited	030 Multifamily Rental Housing Programs	00431 HOUSING FINANCE ACCOUNT	Operations	ORS 456.720	8,814,643	30,578,232	0	10,784,006	Not a significant change from what was reported for 2023 session.
Limited	030 Multifamily Rental Housing Programs	00477 Elderly & Disabled Operating Fund	Operating	ORS 456.535	1,660	0	0	0	
Limited	030 Multifamily Rental Housing Programs	00617 Housing Development and Guarantee Fund	GRANT FUND	ORS 456.630	264,788	3,326,739	3,685,597	3,845,034	Not a significant change from what was reported for 2023 session.
Limited	030 Multifamily Rental Housing Programs	00898 ELECTRICITY PUBLIC PURPOSE CHARGE	GRANT FUND	ORS 456.587	158,535	22,776,063	2,830,189	11,570,890	Beginning balance and revenues are higher than anticipated in 23-25.
Limited	030 Multifamily Rental Housing Programs	00936 COMMUNITY INCENTIVE FUND	GRANT FUND	ORS 458.720	0	1,959,272	0	238,706	Spending is projected slower than anticipated in 23-25.
Limited	030 Multifamily Rental Housing Programs	00984 FARMWORKER HOUSING DEVELOPMENT ACCOUNT	GRANT FUND	ORS 458.660	0	44,787	0	0	Not a significant change from what was reported for 2023 session.
Limited	030 Multifamily Rental Housing Programs	01343 GENERAL HOUSING ACCOUNT	GRANT FUND	ORS 456.665	26,710,756	69,527,815	1,447,369	18,179,142	Spending is projected to be slower than anticipated in 2023-25.
Limited	030 Multifamily Rental Housing Programs	02421 LRB 2023B TAXABLE - PRESERVATION	GRANT FUND	ORS 456.574	265,857	542,100	1,626,098	464,656	
Limited	030 Multifamily Rental Housing Programs	02421 LRB 2023B TAXABLE - PRESERVATION	GRANT FUND	ORS 456.574	0	26,500,000	0	0	New bond sale in 2023
Limited	030 Multifamily Rental Housing Programs	02132 Housing Acquisition Fund	GRANT FUND	ORS 456.574	5,222,628	15,052,896	0	0	Spending in 23-25 projected to be higher than expected.
Limited	030 Multifamily Rental Housing Programs	2448 Housing Project Revolving Loan Fund	GRANT FUND	2024 CHAPTER 110 SEC 35: SB 1537-B	0	75,899,930	0	25,100,900	New, not previously reported. Originally anticipated 23-25 expenditures which now seem unlikely. Program opens late Winter/Spring of 2025.
Limited	040 Single Family Housing Programs	00401 OTHER FUNDS - HOMEOWNERSHIP PROGRAMS	Operations	ORS 456.574	574,411	4,373,243	18,388,022	267,650	Spending projected to be higher than anticipated for 2023-25.
Limited	040 Single Family Housing Programs	00431 HOUSING FINANCE ACCOUNT	Operations	ORS 456.720	5,815,878	2,749,552	7,660,636	12,549,483	Spending projected to be higher than anticipated for 2023-25.
Limited	040 Single Family Housing Programs	00550 MOBILE HOME OMBUDSMAN	Operations	ORS 456.414	557,160	920,397	2,787,742	2,152,644	25-27 GRB revenue may be over stated by up to \$1M based on most recent trends -- wildfires reduced number of homes/parks
Limited	040 Single Family Housing Programs	00695 HOME OWNERSHIP ACCOUNT (CET)	GRANT FUND	ORS 458.655	2,616,397	3,030,319	6,177,555	4,584,555	Not a significant change from what was reported for 2023 session.
Limited	040 Single Family Housing Programs	00695 HOME OWNERSHIP ACCOUNT (HOAP)	GRANT FUND	ORS 458.655	13,143,204	10,650,217	11,598,470	9,307,180	Spending projected to be higher than anticipated for 2023-25.
Limited	040 Single Family Housing Programs	00898 ELECTRICITY PUBLIC PURPOSE CHARGE (MMCR)	GRANT FUND	ORS 456.587	0	973,534	0	667,979	New, not previously reported.
Limited	040 Single Family Housing Programs	01343 GENERAL HOUSING ACCOUNT	GRANT FUND	ORS 456.665	0	284,449	373,449	368,449	Not a significant change from what was reported for 2023 session.
Limited	040 Single Family Housing Programs	01984 Manufactured Home Preservation Fund	GRANT FUND	ORS 458.366	0	818,553	0	981,861	Spending is projected slower than anticipated in 23-25.

Limited	060 Disaster Recovery & Resiliency	Wildfire Recovery	Operations				12,714,904	0	This was an error in revenue projections in GRB
Limited	060 Disaster Recovery & Resiliency	02171 & 02309 for LRB 2022 & 2023 WILDFIRE HOUSING	GRANT FUND	ORS 456.574	0	6,632,973	7,116,194	(1,887,882)	Interest on bond proceeds trending lower due to draw down of funds. GRB expenditure limitation for Special Payments may be too high once the 23-25 biennium closes/reconciles.
Limited	070 Central Services	00401 OTHER FUNDS - CENTRAL SERVICES	Operations	ORS 456.574	0	0	7,520,611	0	This SCR does not generate revenue. Assumes expenses have a transfer in to offset to a zero ending balance.
Limited	070 Central Services	00431 HOUSING FINANCE ACCOUNT	Operations	ORS 456.720	0	0	0	0	Not a significant change from what was reported for 2023 session.
Limited	080 Bond Activities and Debt Service	00401 OTHER FUNDS - HOMEOWNERSHIP PROGRAMS	Operations	ORS 456.574	0	0	954,033	0	Not a significant change from what was reported for 2023 session.
Limited	080 Bond Activities and Debt Service	00431 HOUSING FINANCE ACCOUNT	Operations	ORS 456.720	1,031,095	0		0	This SCR does not generate revenue. Assumes expenses have a transfer in to offset to a zero ending balance.
Limited	080 Bond Activities and Debt Service	00477 ELDERLY & DISABLED OPERATING FUND	Operations	ORS 456.535	1,329,182	0	182,235	0	This SCR does not generate revenue. Assumes expenses have a transfer in to offset to a zero ending balance.
				Totals	74,741,888	342,145,459	133,912,262	162,247,748	
				Rev dbase/ORBITS	74,741,888	342,145,459	133,912,262		
				Difference	0	0	0		
NOT INCLUDED ON THIS FORM:									
	Capital Construction accounts for Article XI-Q Bond proceeds								
	Accounts with non-limited funds related to OHCS bond indentures								
	Trustee Accounts related to OHCS bond indentures								
	These accounts hold funds that are not available for fund sweeps, but information can be provided if needed								

Objective: Provide updated Other Funds ending balance information for potential use in the development of the 2025-27 legislatively adopted budget.

Instructions:

Column (a): Select one of the following: Limited, Nonlimited, Capital Improvement, Capital Construction, Debt Service, or Debt Service Nonlimited.

Column (b): Select the appropriate Summary Cross Reference number and name from those included in the 2023-25 legislatively approved budget. If this changed from previous structures, please note the change in Comments (Column (j)).

Column (c): Select the appropriate, statutorily established Treasury Fund name and account number where fund balance resides. If the official fund or account name is different than the commonly used reference, please include the working title of the fund or account in Column (j).

Column (d): Select one of the following: Operations, Trust Fund, Grant Fund, Investment Pool, Loan Program, or Other. If "Other", please specify. If "Operations", in Comments (Column (j)), specify the number of months the reserve covers, the methodology used to determine the reserve amount, and the minimum need for cash flow purposes.

Column (e): List the Constitutional, Federal, or Statutory references that establishes or limits the use of the funds.

Columns (f) and (g): Use the appropriate, audited amount from the 2023-25 legislatively approved budget and the 2025-27 current service level at Governor's Budget.

Columns (g) and (h): Provide updated ending balances based on revised expenditure patterns or revenue trends. The revised column (i) should assume 2025-27 current service level expenditures, considering the updated 2023-25 ending balance and any updated 2025-27 revenue projections. Do not include adjustments for reduction options

(i): that have been submitted. Provide a description of revisions in Comments (Column (j)).

Column (j): Please note any reasons for significant changes in balances previously reported during the 2023 session.

Additional

Materials: If the revised ending balances (Columns (g) or (h)) reflect a variance greater than 5% or \$50,000 from the amounts included in the LAB (Columns (f) or (h)), attach supporting memo or spreadsheet to detail the revised forecast.

