

# ANALYSIS

## Housing and Community Services Department Expenditures and Outcomes

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**Analyst:** Michelle Deister

**Request:** Acknowledge receipt of a report on expenditures and outcomes related to state investments in programs administered by the Housing and Community Services Department.

**Analysis:** The budget report for the Housing and Community Services Department's (HCSD) 2023-25 budget bill, SB 5511 (2023) contained the following budget note:

*The Housing and Community Services Department is directed to maintain and update – at least semi-annually - data dashboards or other publicly accessible information that provides information on outcomes, and information on state investments provided to the Department. The information should include the amount of the state investment compared to how much of the investment has been spent down and should compare state investments to Department funding from other sources. The information should be available by program, date, county or region, and local service provider, as applicable. This information shall be available and maintained on the agency's web site. At least once per year, the agency shall report to the Joint Committee on Ways and Means on progress to date in expending appropriated funds, and on related outcomes for homeownership, affordable rental housing and homeless services that include the number housing units funded and number of households served through the Department's programs, as applicable.*

This is the second annual report submitted and covers expenditures through January 31, 2025.

HCSD maintains data dashboards on its website for various programs that provide actual expenditures and number of households served, although amounts are not identified by fund type and funds currently obligated but not spent are not included. Therefore, the utility of the dashboards is limited for purposes of comparing specific state investments to the Department's progress in program implementation.

Some of the General Fund that HCSD receives as part of its budget is deposited into established funds to enable expenditures for projects or programs with longer construction and administrative timelines that cross biennia. Some of these programs, such as the Homeownership Development Incubator Program, the Housing Choice Landlord Guarantee Program, Long Term Rental Assistance programs, and other energy assistance programs have unexpended balances from previous biennia.

The Legislative Fiscal Office (LFO) requested and received information on actual expenditures and current obligations funded by General Fund, lottery bond proceeds, and Article XI-Q general obligation bond proceeds for select programs, for the 2023-25 biennium. The following table summarizes commitments, as defined by executed contracts, and outcomes for those select agency programs, as requested by LFO. This does not include funding associated with the Governor's homelessness emergency declaration, which is the subject of a separate report to the Joint Committee on Ways and Means.

HOUSING AND COMMUNITY SERVICES DEPARTMENT						
<i>Expenditures and Outcomes - As of January 31, 2025</i>						
PROGRAM	2023-25 LEGISLATIVELY APPROVED BUDGET*	FUND TYPE	EXPENDED	COMMITTED	REMAINING	HOUSEHOLDS SERVED / UNITS CREATED**
<u>Housing Stabilization Division</u>						
Elderly Rental Assistance	1,450,146	GF	889,301	560,845	-	517
Emergency Housing Assistance (EHA)	29,363,032	GF	17,696,466	11,666,566	-	25,370
Housing Choice Landlord Guarantee Program	337,910	GF	337,910	-	-	157
EHA - School Age Homelessness	5,000,000	GF	99,182	4,601,674	299,144	2,652
Shelter Support - Project Turnkey & Navigation Centers	88,887,732	GF	30,150,336	58,683,271	54,125	6,400
State Homeless Assistance Program	12,709,276	GF	7,157,925	5,551,351	-	23,696
Tribal Housing Stabilization - BAFI - NATO	10,000,000	GF	341,773	8,813,959	844,268	602
Tenant Resources	6,000,000	GF	3,587,239	2,412,761	-	4,712
Tenant Resources - Seeding Justice	1,000,000	GF	-	-	1,000,000	TBD
Individual Development Account Program	5,000,000	GF	5,000,000	-	-	436
Homeless Prevention - Urban League	7,000,000	GF	4,375,000	2,625,000	-	TBD
<u>Project-Based Rental Assistance Division</u>						
Permanent Supportive Housing - Production	80,000,000	XI-Q	-	15,843,867	64,156,133	152
Permanent Supportive Housing - Rental Assistance and Services	15,696,550	GF	6,835,645	8,860,905	-	1,059
Permanent Supportive Housing - Risk Mitigation Fund	4,000,000	GF	-	-	4,000,000	-
<u>Home Ownership Division</u>						
LIFT - Homeownership Production	80,000,000	XI-Q	15,917,970	-	64,082,030	89
LIFT - Subsidy	5,000,000	GF	-	4,971,837	28,163	221
Affordable Home Loans (Down Payment Assistance) - NOAH	7,500,000	GF	-	-	7,500,000	0
Down Payment Assistance	7,500,000	GF	-	-	7,500,000	0
Manufactured Home Repair and Replacement Program	2,500,000	GF	1,849,681	650,319	-	22
<u>Multifamily Housing Division</u>						
LIFT - Multi-family Production	440,000,000	XI-Q	1,084,127	-	438,915,873	980
Affordable Housing Preservation	50,000,000	LB	-	31,836,345	18,163,655	150
Modular Development Capacity	20,000,000	GF	10,000,000	-	10,000,000	4
Predevelopment Loans	9,700,000	GF	-	-	9,700,000	7
Community-Based Agriculture Worker Housing	10,000,000	GF	-	8,066,341	1,933,659	48
Loan Guarantee Program - NOAH	20,000,000	GF	-	-	20,000,000	-
Housing Production Revolving Loan Program	75,000,000	GF	-	-	75,000,000	-
<b>TOTAL 2023-25 BUDGETED SPECIAL PAYMENTS</b>	<b>\$ 993,644,646</b>		<b>\$ 105,322,555</b>	<b>\$ 165,145,041</b>	<b>\$ 723,177,050</b>	
* Amount budgeted for Special Payments; September 2024 report included personal services and services and supplies costs associated with each program						
** Anticipated Outcomes for expended and committed funding						

An analysis of the information provided indicates that:

- Of the \$993.6 million in appropriated General Fund, lottery bond proceeds, or Article XI-Q bond proceeds for the programs listed above, a total of 27.2% of funds have been committed or expended, as of January 31, 2025, with 21% of the biennium remaining.

- Based on spending patterns by partners to date, as much as \$2.5 million in Emergency Housing Assistance funding could remain unexpended by June 30, 2025, despite funds having been fully allocated to partners.
- The \$7.5 million appropriation for down payment assistance through the Network for Oregon Affordable Housing (NOAH) requires NOAH to provide a funding match. As of January 2025, the match requirement had not yet been met.
- The Moderate-Income Revolving Loan program, which provides loans to cities for housing and related infrastructure, recently went live for applications, \$75 million in funding was appropriated, a third of which, or \$24.7 million, is budgeted for the biennium. Funds are anticipated to be available in the Fall 2025.
- Cost per unit or household served varies widely by program, and is influenced by eligibility, policy priorities, economic factors, interest rates, and location of the program provider or project.
- Weatherization and energy assistance programs supported by public purpose charges, federal funds, and customer surcharges had expended 50.4% of 2023-25 budgeted special payments and had allocated a further 42.7% of funding to service delivery partners or projects, as of January 31, 2025.
- Of the \$126.9 million in budgeted special payments related to fire recovery programs funded with federal Community Development Block Grant Disaster Relief funds, 17.8% had been disbursed, and 36.4% had been committed for projects. Funding for these efforts is anticipated to accelerate now that the information technology platform associated with the effort is fully operational.

The Department is reserving a portion of funding due to funding cycle calendars, special initiatives or contingencies for the following programs:

- Tribal Housing Stabilization
- Shelter support funding
- Permanent Supportive Housing Risk Mitigation
- Permanent Supportive Housing Production
- Community-Based Ag Worker Housing
- Affordable Housing Preservation
- Predevelopment financing
- LIFT Multi-Family Production
- Affordable Home Loans (down payment assistance through the Network for Oregon Affordable Housing)
- LIFT Homeownership production

HCSD is proposing that some portion of funding be advanced, prior to the grantees meeting 100% of service and contract deliverables, to accommodate reporting lags, contingencies, and slower-than-expected expenditures of funding approved in earlier tranches for the Tribal Housing Stabilization program, shelter support funding, and long term rental assistance (this funding appropriated in response to Executive Order 23-02; shelter and rehousing programs associated with the executive order are reported on separately, and not included in the table).

**Recommendation:** The Legislative Fiscal Office recommends acknowledging receipt of the report.

# Oregon Housing and Community Services Department Brickman

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**Request:** Report on expenditures and outcomes related to appropriated funds for homeownership, affordable rental housing, and homeless services including the number of housing units funded and number of households served, by the Oregon Housing and Community Services Department.

**Recommendation:** Acknowledge receipt of the report.

**Discussion:** The Oregon Housing and Community Services Department (OHCS) is submitting a report per the following budget note contained in the Department's budget report for Senate Bill 5511 (2023).

## **Budget Note**

*The Housing and Community Services Department is directed to maintain and update – at least semi-annually - data dashboards or other publicly accessible information that provides information on outcomes, and information on state investments provided to the Department. The information should include the amount of the state investment compared to how much of the investment has been spent down and should compare state investments to Department funding from other sources. The information should be available by program, date, county or region, and local service provider, as applicable. This information shall be available and maintained on the agency's web site. At least once per year, the agency shall report to the Joint Committee on Ways and Means on progress to date in expending appropriated funds, and on related outcomes for homeownership, affordable rental housing and homeless services that include the number housing units funded and number of households served through the Department's programs, as applicable.*

This report is the 2025 annual report from OHCS detailing expenditures and outcomes through January 31, 2025. In 2023-25, OHCS received \$710.6 million total funds (\$472.4 million General Fund, \$129.2 million Other Funds, and \$109.0 million Federal Funds) for its Housing Stabilization Program, which includes services addressing homelessness. As of January 31, 2025, OHCS has disbursed a total of \$347.0 million total funds and allocated an additional \$345.4 million for all programs. The amount to remain unspent is estimated to be \$29.1 million (\$22.4 million of which are Federal Funds). Through December 31, 2024, OHCS reports the Homeless Prevention Program has assisted more than 20,300 households at imminent risk of eviction, created more than 4,800 shelter beds, and rehoused over 1,550 households at risk of becoming homeless. Additional programs providing assistance include the Low-Income Home Energy Assistance Program and the Energy Conservation Helping Oregonians program assisting 140,000 Oregonians with utility costs.

The Affordable Rental Housing (ARH) program, which includes the Local Innovation and Fast Track Program (LIFT) and Permanent Supportive Housing (PSH), received \$759.9 million total funds (\$65.7 million General Fund, \$658.0 million Other Funds, and \$36.3 million Federal Funds). As of January 31, 2025, OHCS has disbursed \$56.9 million total funds and has allocated \$431.6 million total funds. The largest amount of funding

within this program (\$520.0 million) is for LIFT and PSH, which can be expended over a six year period for capital purposes. Throughout the 2023-25 biennium, ARH spent a significant amount of time working with partners to update funding processes resulting in a more supportive, less competition-based structure. The culmination of that work, the Oregon Centralized Application (ORCA), launched in the summer of 2024. As of January 31, 2025, funding was reserved for the development of 1,503 units and the preservation of 150 units. OHCS supported four businesses with funding to increase production of modular units and provided seven projects with predevelopment loans.

For Homeownership programs, OHCS received \$214.9 million total funds, including LIFT for homeownership (\$11.3 million General Fund, \$141.6 million Other Funds, and \$62.0 million Federal Funds). The Other Funds include \$80.0 million in LIFT Homeownership funds, which can be expended over a six-year period for capital purposes. OHCS, as of January 31, 2025, has disbursed \$91.1 million total funds and has allocated \$30.7 million total funds. As of January 31, 2025, the Homeownership Division has served 480 homebuyers through down payment assistance programs; funded 576 homes and replaced 22 manufactured homes with the Housing Development Incubator Program, the Homeownership Local Innovative Fast Track Program, and the Manufactured Home Preservation Fund; and served 1,286 people through Foreclosure Avoidance Counseling. The Homeownership Assistance program, funded with Federal Funds, is ending this biennium and has served 2,356 households.



# Oregon

Tina Kotek, Governor

## Housing and Community Services

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March 3, 2025

Senator Kate Lieber, Co-Chair  
Representative Tawna Sanchez, Co-Chair  
Joint Ways and Means  
900 Court Street NE  
H-178 State Capitol  
Salem, OR 97301

Dear Co-Chairs:

### **Nature of the Request**

On July 27, 2023 [SB 5511](#), the Oregon Housing and Community Services Department biennial budget bill, was signed into law. The [SB 5511 Budget Report](#) for the bill included a Budget Note directing OHCS to “*maintain and update – at least semi-annually - data dashboards or other publicly accessible information that provides information on outcomes, and information on state investments provided to the Department. The information should include the amount of the state investment compared to how much of the investment has been spent down and should compare state investments to Department funding from other sources. The information should be available by program, date, county or region, and local service provider, as applicable. This information shall be available and maintained on the agency’s web site. At least once per year, the agency shall report to the Joint Committee on Ways and Means on progress to date in expending appropriated funds, and on related outcomes for homeownership, affordable rental housing and homeless services that include the number housing units funded and number of households served through the Department’s programs, as applicable.*”

### **Agency Action**

Through January 31, 2025, OHCS has expended approximately 60% its General Fund and total funds budget excluding the six-year limitation for capital construction. Of the \$600 million in capital construction authorized in 2023-25, \$15.9M for permanent supportive housing, \$310.4M for LIFT affordable rental housing, and \$29.9M in LIFT homeownership have been awarded. Additional awards are expected during Spring 2025. Below are highlights from each OHCS division on some of the outcomes from the 23-25 biennium.

### **Affordable Rental Housing**

The Affordable Rental Housing (ARH) division is dedicated to creating and preserving quality, affordable rental housing for low- and moderate-income Oregonians. ARH offers financial resources, ensures long-term property performance, and maintains program compliance. During

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the biennium, ARH spent months engaging with partners to update its funding processes to a more supportive, less competition-based structure. The culmination of that work, the Oregon Centralized Application (ORCA), launched summer in the summer of 2024. As of January 31, 2025, funding was reserved for the development of 1,503 units and the preservation of 150 units. OHCS also supported four businesses with funding to increase production of modular units. Additionally, recognizing the need to support affordable housing developments before they can obtain all necessary funding sources and start construction, OHCS created the Predevelopment program in 2024. OHCS provided 7 projects with predevelopment loans.

### **Disaster Recovery & Resilience**

The Disaster Recovery & Resilience division provides support to individuals whose homes were impacted by the 2020 Labor Day fires. During the 2023-2025 biennium, the division utilized Lottery Revenue Bonds to develop 30 permanent units in Jackson County and expects 217 additional permanent units serving three counties: 12 in Lincoln, 30 in Lane, and 175 in Jackson. Through the use of the Wildfire Recovery and Resilience Account, the division has served an additional 868 households across 8 counties, funded 4 projects serving 53 additional households with intermediate housing assistance and 1 permanent unit, and expects to fund 13 additional permanent units.

### **Homeownership**

The Homeownership Division provides services to Oregonians seeking to become homeowners and provides support to homeowners struggling to stay in their homes. In the 2023-2025 biennium, the Homeownership Division served 480 homebuyers through our down payment assistance programs. The Housing Development Incubator Program, the Homeownership Local Innovative Fast Track Program, and the Manufactured Home Preservation Fund have funded 576 homes along with replacing 22 manufactured homes across Oregon. Near the end of the 2023-2025 biennium, the federally funded Homeowner Assistance Fund program is ending after serving 2,356 households. The Homeownership Division also served 1,286 people through Foreclosure Avoidance Counseling.

### **Housing Stabilization**

The Housing Stabilization Division works to prevent homelessness, support shelter operations, and provide a wide range of housing stability programs to help meet the needs of the most vulnerable Oregonians. In the 2023-2025 biennium, the Emergency Housing Assistance program will have served over 24,000 households, providing a critical resource for people in need. Through the Oregon Eviction Diversion and Prevention Program (ORE-DAP), Eviction Prevention Rapid Response (EPRR), and partnerships with culturally responsive organizations, OHCS will have assisted more than 20,300 households at imminent risk of eviction. Through Governor Kotek's Executive Orders on homelessness and shelter expansion efforts, more than 4,800 shelter beds



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have been supported and maintained, which has significantly increased our capacity to serve individuals and families experiencing homelessness all across the state. Additionally, the Oregon Rehousing Initiative (ORI) successfully rehoused over 1,550 households that would have otherwise been at risk of becoming homeless. Additional resources such as the Low-Income Home Energy Assistance Program (LIHEAP) and Energy Conservation Helping Oregonians (ECHO) have provided crucial relief to over 140,000 Oregonians by easing the burden of rising utility costs. Lastly, the Individual Development Account (IDA) program has empowered over 1400 Oregonians to achieve their long-term savings goals and get closer to home ownership.

### **Dashboards**

OHCS has been producing various dashboards on the number of households served and units funded through our homeownership, affordable rental housing, and homeless services programs for a number of years, and have made the majority of those available to the public. The [Homeownership Dashboard](#) has been updated on a quarterly basis since 2017, and the [Affordable Rental Housing Funding Dashboard](#) has been updated annually since 2019. Our newest dashboard is the [OHCS Housing Instability Dashboard](#). We also have dashboards relating to EO activities, including Shelter Development and Rehousing activities that were directed by MAC groups, which are included on other dashboards here for the Balance of State: [OHCS Emergency Homeless Response BoS Dashboard | Tableau Public](#) and here for the original EO Regions: [OHCS Emergency Homeless Response Dashboard | Tableau Public](#). All of these dashboards are filterable by funding agency. These numbers are still subject to change as we work with the funding agencies to ensure accuracy.

### **Action Requested**

The Oregon Housing and Community Services Department requests acceptance of this report.

### **Legislation Affected**

None.

Sincerely,

Andrea Bell, Executive Director  
Oregon Housing and Community Services  
cc: Amanda Beitel, Legislative Fiscal Office  
Michelle Deister, Legislative Fiscal Office  
Kate Nass, Chief Financial Office  
Tamara Brickman, Chief Financial Office