



## **HOMES FOR GOOD HOUSING AGENCY**

### **BOARD OF COMMISSIONERS MEETING WEDNESDAY September 30th, 2020**

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# Agenda

Homes for Good Housing Agency

## BOARD OF COMMISSIONERS

### Location of the meeting:

This meeting will be conducted via public video call and conference line (see details below).



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**Wednesday, September 30, 2020 at 1:30pm**

To prevent the spread of COVID-19 Homes for Good will be conducting the September 30<sup>th</sup>, 2020 meeting will occur via a public video call with dial-in capacity. The public will be able to join the call, give public comment, and listen to the call:

Please join my meeting from your computer, tablet or smartphone.

<https://www.gotomeet.me/HomesforGoodAdministration/september-30th-homes-for-good-board-meeting>

You can also dial in using your phone.

United States: [+1 \(571\) 317-3112](tel:+15713173112)

**Access Code:** 410-653-453

### 1. PUBLIC COMMENTS – 20 Minutes

(Maximum time 20 minutes: Speakers will be taken in the order in which they sign up and will be limited to 3-minutes per public comments. If the number wishing to testify exceeds 10 speakers, then additional speakers may be allowed if the chair determines that time permits or may be taken at a later time.)

### 2. COMMISSIONERS' RESPONSE TO PUBLIC COMMENTS AND/OR OTHER ISSUES AND REMONSTRANCE (2 min. limit per commissioner)

### 3. ADJUSTMENTS TO THE AGENDA

### 4. COMMISSIONERS' BUSINESS

### 5. EMERGENCY BUSINESS

### 6. ADMINISTRATION

- A. Executive Director Report (Estimated 10 minutes)
- B. Approval of 8/19 Board Meeting Minutes
- C. **PRESENTATION**— Audit Exit Report from Moss Adams (Kevin Mullerleile, Senior Manager, Moss Adams) (Estimated Time 20 minutes)
- D. **ORDER 20-30-09-01H** — In the Matter of Adopting the 2020-2021 Budget (Jeff Bridgens, Finance Director) (Estimated Time 50 Minutes)
- E. **ORDER 20-30-09-02H** — In the Matter of Approving the Public Housing Operating Budget for the Fiscal Year Ending September 30, 2021 (Jeff Bridgens, Finance Director) (Estimated Time 10 Minutes)

- F. **ORDER 20-30-09-03H** — In the Matter of Approving the Submission of the PHA FY21 Annual Plan (Melanie Church, Division Analyst) (Estimated Time 10 minutes)
- G. **ORDER 20-30-09-04H** — In the Matter of Authorizing the Condominium Declaration for Market District Commons Condominium. (Steve Ochs, Real Estate Development Division Director) (Estimated Time 10 minutes)
- H. **ORDER 20-30-09-05H** — In the Matter of Approving Contract 20-P-0056 (Architectural Services) for the 1100 Charnelton Permanent Supportive Housing Development (Nora Cronin, Project Development Manager) (Estimated Time 10 minutes)

## **8. OTHER BUSINESS**

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### **UPCOMING AGENDA ITEMS**

#### **OCTOBER 2020**

WORK SESSION: Board Input/Vision for Strategic Equity Plan development process

#### **NOVEMBER 2020**

NO MEETING

#### **DECEMBER 2020**

WORK SESSION: Board Input/Vision for Real Estate Development Pipeline 2021- 2025 and new development models

#### **JANUARY 2021**

Election of New Board Chair & Announcement of Vice Chair

WORK SESSION: Board Input/Vision for Customer Service Enhancements

In response to the Holiday Farm wildfire crisis Homes for Good staff determined that we have 129 Housing Choice Voucher households that were in evacuation zones. On 9/11 our staff attempted contact with all of these households via phone. For the households that we did speak with, the reaction was surprise and thanks that we were in contact with them to offer our support. We have 31 households there were in Evacuation Zone 3, and of these 31 households, 10 have lost homes including 4 households that are served by our Veterans Affairs Supportive Housing (VASH) program. Not all households in Zone 3 know if their home is still intact or not so these numbers may change. For the VASH households, we partner with the Veterans Affairs Support Team and we are supporting their efforts to find new housing. For the non-VASH households Homes for Good staff members are supporting their efforts to find replacement housing. We have also been in contact via letter with landlords whose properties have been destroyed or damaged.

We continue to monitor the financial impacts from COVID-19 diligently. The Housing Choice Voucher (HCV) Program has experienced 346 households representing 11% of the households on the program that have asked for rent decreases, which has increased the amount of subsidy we provide to participants by \$88,000 per month. In July, we applied for HUD Cares Act set aside funding, which is the funding we most need to offset the increase in HCV subsidy we are deploying. HUD has since changed the process so we currently do not qualify for the set aside funding based on new HUD methodology. If we can't meet the new HUD methodology the current annualized impact, which will grow every month, is \$1,058,000. The total amount of Cares Act funding for the HCV program we have received to date is \$1,223,000 but this is just for administrative expenses and it can't be spent on the increased Housing Assistance Payment subsidy that we are deploying. We have a deadline to spend these funds by 6/30/21. The Public Housing Portfolio and the HUD Multifamily Portfolio have experienced 143 households representing 17% of the households in the portfolio that have asked for rent decreases, which has reduced rent revenue by \$38,000 per month. In addition to the rent decreases the residents living in these portfolios have also struggled to pay rent and the total amount of uncollected rent for April, May, June and August is \$31,000. The September uncollected rent is as of the 10th and totals \$54,000 but we know from previous months that our residents continue to pay rent through the month so we know that the amount of uncollected rent for August will decrease significantly. The total amount of Cares Act Funding we have received for this portfolio is \$313,000 and these funds must be spent by 12/31/21. We are concerned that HUD hasn't indicated that more CARES Act funding for this portfolio will be allocated.

For our 3rd party managed portfolio the residents living in this portfolio have also struggled to pay rent and the total amount of uncollected rent for April through August is \$48,000 representing 3.2% of the gross potential rent revenue. The September uncollected rent is as of the 15th and totals \$22,000 but we know from previous months that our residents continue to pay rent through the month so we know that the amount of uncollected rent for September will decrease.

We are also working to support Lane County in their distribution of Cares Act rent assistance funding. To date we have sent Landlords a total of \$149,000 of rent assistance on behalf of 53 households. There are a total 8 community based organizations/programs that are supporting Lane County in distributing this rent assistance funding and we are one of three that are meeting Lane County's weekly "need to expend" requirements. On 9/23 Lane County contacted us to request our support in increasing the amount of funds that we distribute to support their expenditure requirements.

We are excited to report that we received 18 applications for the Equity Strategy Team and we are currently in the interview/selection process. The key responsibility of this committee is to create a Strategic Equity Plan, in coordination with the Homes for Good Board of Commissioners and the Leadership Team, that will guide the work of our organization in the coming years.





# MINUTES

Homes for Good

Housing Agency BOARD

OF COMMISSIONERS



Location of the meeting:

This meeting was conducted via public video call and conference line (see details below).

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**Wednesday, August 19<sup>th</sup>, 2020 at 1:30pm**

To prevent the spread of COVID-19 Homes for Good conducted the August 19<sup>th</sup> Meeting via a public video call with dial-in capacity. The public was able to join the call, give public comment, and listen to the call:

Please join my meeting from your computer, tablet or smartphone.

<https://global.gotomeeting.com/join/720420901>

You can also dial in using your phone.

United States: [+1 \(872\) 240-3212](tel:+18722403212)

**Access Code:** 720-420-901

## 1. PUBLIC COMMENTS – 20 Minutes

(Maximum time 20 minutes: Speakers will be taken in the order in which they sign up and will be limited to 3-minutes per public comments. If the number wishing to testify exceeds 10 speakers, then additional speakers may be allowed if the chair determines that time permits or may be taken at a later time.)

No Public Comment Given

## 2. COMMISSIONERS' RESPONSE TO PUBLIC COMMENTS AND/OR OTHER ISSUES AND REMONSTRANCE (2 min. limit per commissioner)

Commissioner Pat Farr was excused from the whole meeting.

## 3. ADJUSTMENTS TO THE AGENDA

No Adjustments to the Agenda

## 4. COMMISSIONERS' BUSINESS

No Commissioners' Business

## 5. EMERGENCY BUSINESS

No Emergency Business

## 6. ADMINISTRATION

### A. Executive Director Report (Estimated 10 minutes)

**Jacob Fox:** Talks about the Diversity Equity Strategy team that the agency will be forming, and some of the work they will do including looking at the Section 3 Program and the hiring of residents, low income people, and other minorities.

Jacob talks about the site staff who are working on food programs to get needed food to residents.

Jacob touches on the financial impacts of COVID-19.

Jacob talks about Real Estate Development including a positive change order for Market District Commons, and the funding for the 1100 Charnelton Permanent Supportive Housing Project.

### B. Approval of 7/22 Board Meeting Minutes

Motion: **Heather Buch**

Second: **Michelle Thurston**

**Joe Berney:** I just wanted to point out what is not in those minutes: we have been promised for a long time to look at long term strategies and integrating more inclusive perspectives into those, it is also not on this board agenda.

**Char Reavis:** Is this something we discussed that was not included in the minutes that you would like to be added?

**Joe Berney:** No, I apologize, this is something that Jacob brought up months ago, and was supposed to speak with me and with other people months ago, and that has not yet occurred. Nothing has happened, and this is just a way for me to bring it up saying it would be nice to have that discussion.

**This motion has been based unanimously 6/0 with Commissioner Farr being excused.**

### C. **ORDER 20-19-08-01H**— In the Matter of Approving the Submission of the PHA FY21 Annual Plan (Melanie Church, Division Analyst) (Estimated Time 5 minutes)

**Melanie Church:** Talks about the annual plan schedule, and the waivers from HUD for the plan process during COVID-19.

**Char Reavis:** So, I believe Michelle and I have quite a bit to say about this, so I am going to let Michelle go first.

**Michelle Thurston:** The one thing that I would like to point out that the information wasn't really provided to residents of the buildings. Yes, it was on the website, but usually there are hard copies, and information

on how to contact Homes for Good for any questions, comments, or concerns. There was a RAB (Resident Advisory Board) Meeting last month, where it was discussed, and we had a lot to say, and the results were widdled down to about two sentences, and residents really didn't get an equitable voice in that.

I know it was on the website, but a lot of people don't have access to computers, or the internet. There was a lot of information shared on social media, and a lot of people don't have social media. So, I do have some upfront concerns about that.

**Char Reavis:** So COVID has messed a lot of things up. Usually things come to RAB like it did, and then they come back to RAB again in the form of a book because these are changes in our policies, then it goes to Public Comment which HUD said that we didn't have to happen this year. As a board member I will sign this in if we vote on it, but as a resident leader, with RAB, I feel like we didn't get enough feedback from people. Normally as a RAB member I would have taken this to a resident meeting and let people know about it and that they would be able to comment on it, but Resident Meetings aren't happening right now our community rooms are closed so that didn't happen.

Char then express that she is not in support in the change of the occupancy standards that can affect transfers. Char talks about the current policy and some of the implications of the change in Public Housing, and her opposition.

I really wish this could have gone back to the RAB again.

**Wakan Alferes:** Talks about the ability to still gather comments from RAB after another copy is sent out to RAB that day, and work those comments in before submission.

**Jacob Fox:** Asks Melanie and Wakan to explain the change and the nuisances in the occupancy.

**Melanie Church:** (Referencing Pg. 39 of the Board Packet on screen)

Talks about the new policy and the alignment with Section 8 occupancy. She talks about the current policy and what unit sizes families can qualify based on ages of children and genders of children. She gives examples of family compositions and what they would qualify for. She talks about how this mostly affects families during the intake process, not those who are transferring or who grow their family sizes. She talks about the Fair Housing Council of Oregon, and the new policy aligning with their suggestions. Melanie also talks about the limited amount of Public Housing units, specifically the limited amount of 3- and 4-bedroom units, and the new occupancy standards would allow Homes for Good to House the most amount of people fairly.

Melanie talks about the current transfer list that Homes for Good holds, and that many of the transfer requests are for Elderly or disabled families who are looking to move from a one-bedroom unit to a two bedroom unit to accommodate a live-in aid, or to have another family member move in. The change in policy would not affect these transfers, since the other family member or the live-in aid would still be allocated a separate bedroom. The larger families who have requested transfers haven't done so specifically because of the ages or the genders of their children, but instead based on the total number of people in the unit.

Melanie talks about the alignment of the Public Housing Policy to be consistent with the Section 8 policy, so that if residents transfer between programs, they will have a consistent experience.

**Joe Berney:** I am just less curious about the institution of Homes for Good is explaining, and more curious about the resident Commissioners' perspective.

**Michelle Thurston:** I personally don't have a problem with the new guidelines, I see where it could affect people who want to have let's say, five kids, and have the different ages or genders mixed together being a recipe for disaster. But I also understand that we are housing people who otherwise wouldn't be housed, so in that respect I don't have a problem with that. So, my problem is, even though it was brought to the RAB, RAB did not get the chance to bring it to the residents, and for them to get the chance to chew it over, discuss it, see if they had any issues. I know for my complex the biggest area to understand is the new pet policy. They know that there are going to be new rules, but they don't have any of the information because they don't have access to internet, they don't have access to a computer, so they didn't have the opportunity to provide input. So that is my main concern, that my fellow residents didn't get the chance to contribute comments or read and understand.

**Char Reavis:** My issue is that there is only one sentence under that section with the occupancy there is only one sentence about RAB comments when we had a 45-minute conversation about it, and I didn't feel like our comments were captured like they could have been.

**Joe Berney:** When does this have to be submitted? Do we not have time to accommodate?

**Wakan Alferes:** Usually this is due to HUD in July. The HUD waivers states that we have until October 19 to submit. We do feel like we do have the time to get the additional comments from RAB like Char stated, but I don't know that we have time to have resident meetings before then. We have tried to get a number of resident meetings going, and they just haven't been working in a digital format. I think there are some very valid points that they are pointing out that are COVID struggles. I think it is also good to point out that even if HUD gives us a waiver, which makes our work easier in the moment, it doesn't detract from the need to collect good feedback and input from our participants and residents, and I

**Michelle Thurston:** One thing I wanted to point out that Char and I were the only RAB members that were able to attend that meeting due to the technology, so I am under the impression that our voices were listened to, but maybe not communicated. I would at least like to say thank you for listening and addressing that.

**Commissioners discuss not to make a motion and bring this item back to the next Board Meeting after some corrections and additional comments.**

- D. ORDER 20-19-08-02H—** In the Matter of Accepting a Quote and Awarding the Contract for the Legion Cottages - General Contractor Project. (Jacob Fox, Executive Director)  
(Estimated 10 minutes)

**Commissioner Heather Buch** declares a conflict of interest and recuses herself from the item, being related to the Executive Director of St. Vincent DePaul who is a service provider partner for the project.

**Jacob Fox:** Explains the role of St. Vincent DePaul in the project being a referring supportive services partner, and the context for the retroactive procurement.

Jacob explains the context of the contract being slightly over \$100,000, and other context for the retroactive contract. Jacob states, that as suggested last month, Homes for Good will be coming to the board in the next couple of months to get the contract signing approval of the Executive director raised to \$150,000 to align with federal requirements.

**Joe Berney:** Is it federal requirements that an Executive Director has signing authority up to 150K as you stated, or does the Federal regulations give you the leeway to go up to 150K, which makes it a decision here locally?

**Jacob Fox:** As I understand it, HUD said executive directors can authorize contracts up to 150K without board approval, but the Board would need to authorize me to do that first because the current threshold is 100k for my authority.

**Michelle Thurston:** I just wanted to make sure that this is something that we are going to discuss in a different board meeting, because that seems very reasonable in my opinion.

Motion: **Jay Bozievich**

Second: **Joe Berney**

**Jay Bozievich:** Talks about the closeness of the bids and the competitiveness

**This motion is passed unanimously 5/0 with Commissioner Heather Buch being recused, and Commissioner Pat Far being excused.**

- E. **ORDER 20-19-08-03H—** In the Matter of the Joint Order of the Board of Commissioners and Local Contract Review Board Exempting the Construction of PSH developments 1100 Charnelton and 13th and Tyler in Eugene, Oregon from the Competitive Bidding Requirements and Directing the Use of the CMGC Alternative Contracting Method. (Nora Cronin, Project Development Manager) (Estimated Time 5 minutes)

**Nora Cronin:** Explains that this is a joint motion for the board of commissioners and the contract review board to exempt both projects from using the competitive bidding process and use the CMGC Alternative Contracting Method instead.

**Joe Berney:** Can you state why this is the desired mechanism to move forward?

**Nora Cronin:** Yes, so some of the biggest factors for us is that in the CMGC contracting method we are able to get the contractor on board really early in the design. It helps save costs, and the architect prefers to have the architect there at the table, and we are able to get some of the sub-contractors to the table

early, so we are able to get more of an efficient building, and quite frankly for affordable in our opinion.

**Joe Berney:** Comments that this is one of the methods that some of the Lane County projects are exploring and are looking at implementing Community Benefit Agreements.

Inquires if Homes for Good is under the same requirements for Prevailing Wages as other municipality building projects.

**Nora Cronin:** States that 13<sup>th</sup> & Tyler is both BOLI and Federal Davis Bacon wage rates, and that 1100 Charnelton is only subject to the Federal Davis Bacon wage rates.

**Joe Berney:** This question to Jacob: Is Homes for Good going to be looking in to how the County is implementing Community Benefits Agreements to bind these as long as they don't increase costs, and is Homes for Good going to embrace that also? Especially on these projects given what we just learned?

**Jacob Fox:** I think that is a good discussion to have as a board Joe, and what I think what we need to do is look at the costs and make sure it is comparable if we enter into those agreements, and I don't think this board, particularly Char and Michelle as appointed commissioners have had a briefing on Community Benefit Agreements, so that would be my suggestion as next steps.

**Joe Berney:** Give an interview about Community Benefit Agreements. He states that he is interested in having a board discussion about Community Benefit Agreements prior to commitments being made so that they can be embraced through these projects.

I think you will find that as long as you are subject to prevailing wages you will find that this does not increase costs.

**Jacob Fox:** Joe just one question: When would you enter into those agreements, and can you tell us just a little bit about the timing and how those work? Jacob states that he has experience with Community Benefit Agreements in Portland, but not in Lane County.

**Joe Berney:** The vernacular is unfortunate, a Community Benefits Agreement in Lane County, is not the same as in Portland. They're fundamentally different. Ones in Portland add layers of cost, it adds layers of community groups that are involved in negotiating, these do not do that.

Motion: **Michelle Thurston**

Second: **Joe Berney**

**Jay Bozievich** states he is going to abstain on this vote; I would have voted yes on the 1100 Charnelton site and no on the 13<sup>th</sup> & Tyler project if these would have been separate board orders. I am going to continue to oppose the fairgrounds project, I think it is setting up a future dynamic between the Fairgrounds and the residents, and I think that is going to be a problem.

**This motion passes 5/0 with Commissioner Bozievich abstaining, and Commissioner Pat Farr being excused.**



- F. **ORDER 20-19-08-04H**— In the Matter of Approving Contract 20-C-0050 (Construction Management/General Contractor Services) for 1100 Charnelton, PSH Community in Eugene, Oregon (Nora Cronin, Project Development Manager) (Estimated Time 5 minutes)

**Nora Cronin:** Notes the contract number has changed to "20-C-0050" from the original board order title.

**Nora Cronin:** This board order is to approve entering into a contract with Essex construction for the 1100 Charnelton Project. Information about the process is in the board memo. There was an RFP in June, three contractors applied. A five-person committee evaluated the proposals based on the criteria posted in the RFP. Key factors in selecting Essex was that Essex proposed a shorter construction timeline than the other two, which resulted in significant cost savings to the project. This is because of their experience in tight urban sites, as well as their staff capacity at the time which also lead to them scoring well.

With this project, you would be allowing us to enter into the contract with Essex. This is a similar contract to what you have seen with The Commons on MLK, Market District Commons, and RAD Phase II. It would set a pre-construction services amount, and a guaranteed maximum price for when they go out for final bid, and sets the fixed CMGC fee at 3.5%, and it sets out the bidding process we would require for sub-contractors.

**Jacob Fox:** Would like to get feedback from Joe about the additional details within the board memo, and if it fit his requests from a couple of board meetings ago.

**Joe Berney:** Now, pretty much, and we can always talk after the meeting.

Motion: **Michelle Thurston**

Second: **Heather Buch**

**This motion passes 6/0 with Commissioner Pat Farr being excused.**

- G. **WORK SESSION**— 2021 Budget Work Session (Jeff Bridgens, Finance Director)  
(Estimated Time 30 Minutes)

**Jeff Bridgens:** Gives an overview of the budget process, and that the Agency budget will be coming to the board in September for approval.

Goes over the overall budget for FY 2019 and compares to budgeting for FY2020.

**Joe Berney:** (Financial Overview 2019 slide) The total revenue and resources available, listed as \$52mm, what of that is revenue, is that all revenue? Or, what of that is revenue and what of that is debt?

**Jeff Bridgens:** Good question: \$38mm of that comes from revenue, the rest comes from borrowing.

**Joe Berney:** So, on the surface it looks like we made more money than we spent, but that is not correct.

**Jeff Bridgens:** No, when you see our financial statements, you will see the \$38mm dollars in revenue, but when you look at our operating expenses, you will only see about \$35mm dollars in expenses. So you will see an operating income of about 3 million dollars, but we spent a lot of that on non-operating expenses such as interest expense, and some other increases for capital related grants as well factoring into the overall net position. But what you will see in terms of the operating revenues and expenses is an overall operating net income in 2019.

**Jeff Bridgens:** (Rent Assistance Division FY 2021 Budget Slide) Talks about the increase in Housing Assistance Payments (HAP) and an increase in admin fee, and its relation to new voucher programs that the agency is administering, and the relationship the Fair Market Rent (FMR) study that the agency had conducted. With that we would see an increase in HAP going out to residents. Some of that may not be new vouchers, but also more expensive vouchers, spending more on a per-voucher basis.

**Jacob Fox:** (Rent Assistance Division FY 2021 Budget Considerations Slide) Talks about the FMR study, Project Based Vouchers in relation to new Real Estate Development projects, Diversity Equity and Inclusion initiatives, and a potential management position in Rent Assistance.

**Joe Berney:** What does "continued diversity, equity, and inclusion training" mean to you and how much money would that be?

**Jacob Fox:** It doesn't necessarily mean a huge line item, but for me I think the budget needs to reflect our ongoing commitment to DEI work. For the Rent Assistance Division, it could be continued training for our staff, it could be targeted outreach to female landlords, or landlords of color in the community. For me it is a continued theme that we will come back to the board with more specific about.

**Joe Berney:** It doesn't sound like you are firm on what that means, I would propose that Homes for Good, what that means is, in terms of hiring, renting and contracting, that if your making that extra effort to reach out to people, you move money towards them.

**Jeff Bridgens:** Notes about how HUD funding is budget at this time, but that Homes for Good will not receive notice of what the actual HUD funding is until about January. Also talks about the RAD conversion of Public Housing units into project-based vouchers and how that increases funding into the Rent Assistance Division.

**Joe Berney:** It looks to me that Homes for Good is incentivized to build new because there is an administrative fee or development fee built in. Is that Correct?

**Jeff Bridgens:** There is a development fee for new developments as that is a significant support that Homes for Good requires to subsidize other programs where there isn't as much admin dollars, so it is a significant revenue source for the agency. In regards to vouchers, there is an administrative revenue associated with each voucher.

**Joe Berney:** So, there is an incentive for Homes for Good to build new, financially.

**Jacob Fox:** Yes, for sure.

**Heather Buch:** Talks about her experience with developer fees, building new and with rehabilitation.

**Jeff Bridgens:** Talks about the Public Housing Budget. Jeff mentions the impact of RAD on the Public Housing Budget. Also talks about the impacts of COVID-19 rent loss on the FY 2020 budget.

**Jeff Bridgens:** Talks about the Real Estate Development Budget

**Jacob Fox:** Mentions the potential shrinkage of staff by two employees due to the shrinkage in the portfolio due to RAD.

**Jeff Bridgens:** Talks about the COCC budget and the Real Estate Development Budget.

**Jacob Fox:** Talks about the cross-divisional impacts of the RAD program and the budget. The potential addition of a new Project Developer to focus on development in Rural Lane County. He also talks about potential rehabilitation projects such as Olive Plaza, then the developer fee structure.

**Jeff Bridgens:** Talks about the increase in the COCC budget due to the New Administration Building and rents associated with it for the new admin building.

**Char Reavis:** Asks about the Rent being charged to the divisions.

**Jeff Bridges:** For the divisions who are using the new admin building by space, they are charged a market rent for office space. That rent is intended to cover the cost of operating the building and pay their principal and interest on the loan that was taken out to buy and renovate the building.

**Char Reavis:** So, it comes out of the budget of each division.

**Jeff Bridgens:** Yes. So, the rent is a way for each division who is using the space, pay for the space.

**Michelle Thurston:** You were saying you want to add on to the development team.

**Jacob Fox:** Yes, what I have flagged is potentially three new positions. We frankly don't know if we will be able to afford them yet, but yes that is accurate.

**Michelle:** Asks about the reduction of staff in other areas, and if the addition of those areas mean the reduction in other areas such as Resident Services or Property Management.

**Jacob Fox:** Talks about RAD and the affect it will have on the FTE of the Supportive Housing Division. Some divisions may grow a little bit, some divisions may shrink some, but our goal is about a net neutral in the total staff.

**Jacob Fox:** Talks about the need for another Finance staff member to help support the Real Estate Development team and the complicated financial transactions that go on in that department.

## **8. OTHER BUSINESS**

Adjourn



# BOARD OF COMMISSIONERS AGENDA ITEM

**BOARD MEETING DATE:** 09/30/2020

**AGENDA TITLE:** Audit Exit Report from Moss Adams

**DEPARTMENT:** Finance

**CONTACT :** Jeff Bridgens

**EXT:** 2525

**PRESENTER:** Kevin Mullerleile

**EXT:**

**ESTIMATED TIME :** 20 Minutes

- ☐ ORDER/RESOLUTION
- ☐ PUBLIC HEARING/ORDINANCE
- ☒ DISCUSSION OR PRESENTATION (NO ACTION)
- ☐ APPOINTMENTS
- ☐ REPORT
- ☐ PUBLIC COMMENT ANTICIPATED

**Approval Signature**

**EXECUTIVE DIRECTOR:**

A handwritten signature in black ink, appearing to be "J. H.", is written over a horizontal line.

**DATE:** 9/22/20

**LEGAL STAFF :**

**DATE:**

**MANAGEMENT STAFF:**

**DATE:**

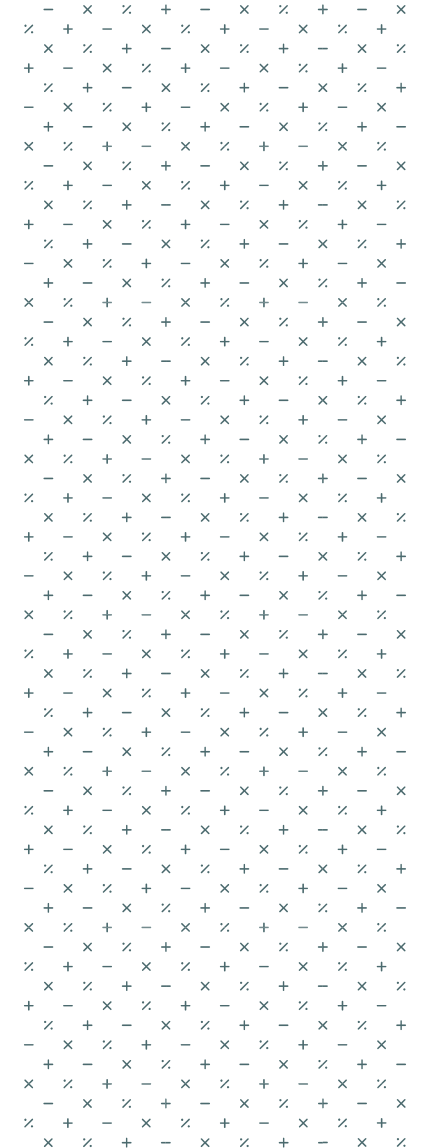


# Homes For Good Housing Agency Audit Results

COMMUNICATION WITH THOSE CHARGED WITH  
GOVERNANCE

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September 30, 2020







# Board of Commissioners

**Homes For Good Housing Agency**

Dear Board of Commissioners:

Thank you for your engaging Moss Adams LLP. We are pleased to have the opportunity to meet with you to discuss the results of our audit of the financial statements and compliance work of Homes For Good Housing Agency for the year ended September 30, 2019.

The accompanying report, which is intended solely for the use of the Board of Commissioners and Management and not intended to be and should not be used by anyone other than these specified parties, presents important information regarding the financial statements and our audit that we believe will be of interest to you.

We conducted our audit with the objectivity and independence that you expect. We received the full support and assistance of Agency personnel. We are pleased to serve and be associated with the Agency as its independent public accountants and look forward to our continued relationship.

We look forward to discussing our report or any other matters of interest with you during this meeting.

Sincerely,

*Moss Adams, LLP*



# Agenda

1. Engagement Team
2. Nature of Services Provided
3. Auditor Opinions/Reports
4. Significant Audit Areas
5. Communication with *Those Charged with Governance*
6. Accounting Update



# Engagement Team

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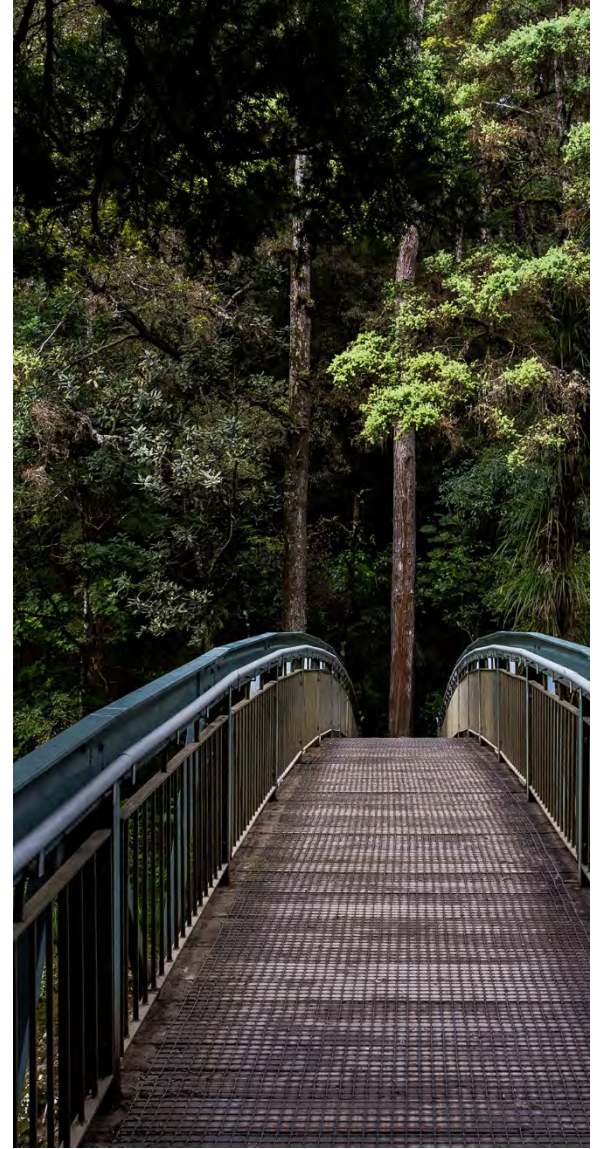
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# Nature of Services Provided





# Nature of Services Provided

---

1

Audit the Agency's financial statements (with reliance on other auditor for other component units) in accordance with GAAS and GAGAS

2

Assistance with, and technical review of, the financial statements for compliance with GAAP

3

Compliance testing/reporting under Oregon Minimum Audit Standards

4

Single Audit of federal grant programs under Uniform Guidance



# Nature of Services Provided

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5

Agreed-upon procedures over  
electronic REAC submission

6

Reporting - Overall audit plan,  
audit results, communicating  
internal controls findings and  
noncompliance





# Auditor Opinions & Reports





# Auditor Report on the Financial Statement

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Unmodified Opinion

**Financial statements are presented fairly and in accordance with U.S. GAAP**



# Other Auditor Reports

## GAGAS Report on Internal Control Over Financial Reporting and on Compliance and Other Matters

- No financial reporting findings
- No compliance findings

## Report on Compliance with Requirements that could have a Direct and Material Effect on the Major Federal Programs and on Internal Control Over Compliance in accordance with the Uniform Guidance for Federal Awards (2 CFR Part 200)

- No control findings
- No compliance findings



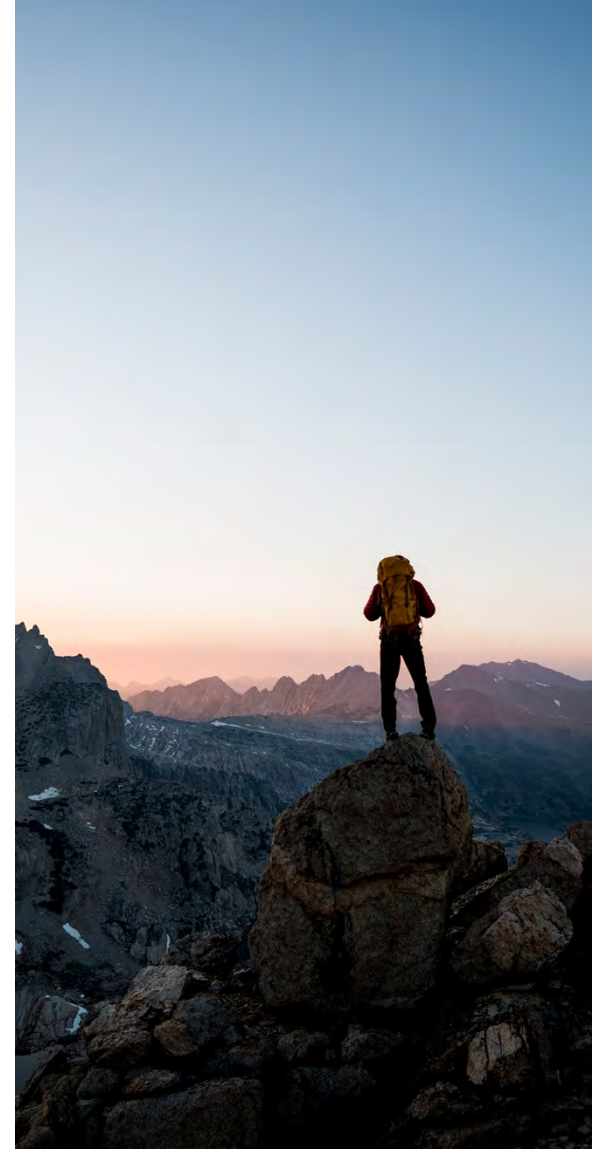
# Other Auditor Reports

**Report on Compliance  
and Other Matters based  
on an audit of financial  
statements in  
accordance with Oregon  
Minimum Standards**

- No compliance findings



# Significant Audit Areas





# Significant Audit Areas



Audit Area	Procedures	Results
Internal control over financial reporting	Tested year-end closing entries, and footnote disclosures	No audit adjustments needed, extension with the State's 6/30/19 audit filing deadline wasn't granted
Notes Receivable	Review of promissory agreement, testing of valuation and collectability	Balance materially correct, new notes properly added
Capital Assets	Review of the Agency's valuations, testing additions, analytical tests of depreciation	Capital assets materially correct, one passed adjustment for late invoice received that wasn't capitalized as of 9/30/19
Long Term Debt	Testing of debt agreements, payments and interest, confirmed outstanding balances	Debt transactions were supported by underlying agreements, in compliance with applicable laws





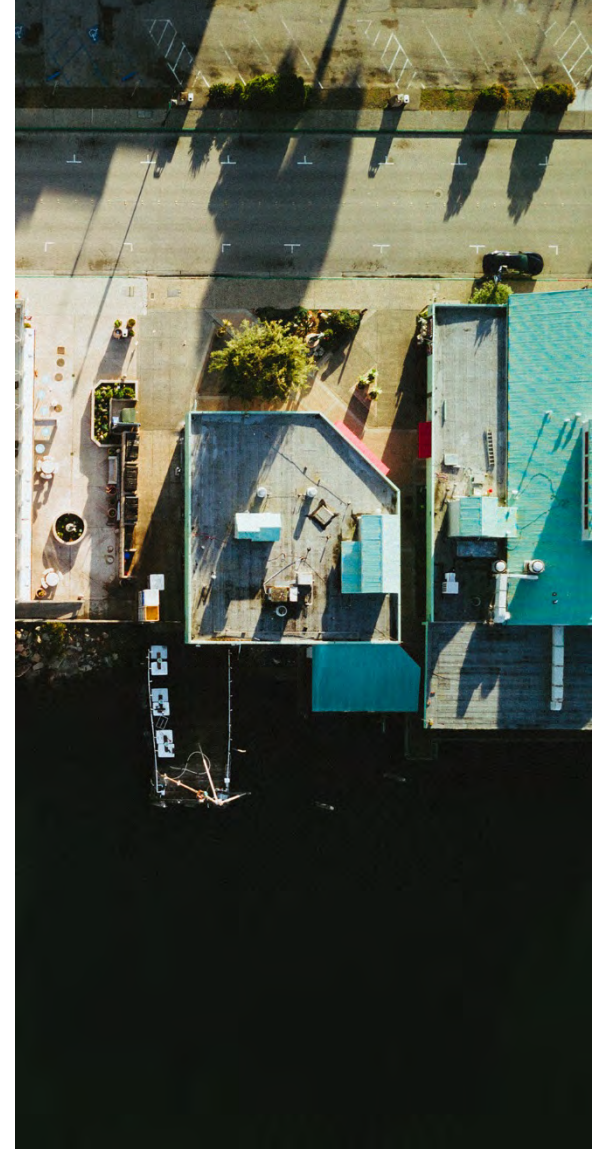
# Significant Audit Areas



Audit Area	Procedures	Results
Component Unit Reporting	Read component unit audited financial statements, Assess other audit firm's independence	Unmodified opinions received on eight component unit audits
Compliance with Federal Laws and Regulations	Testing of the SEFA, Uniform Guidance procedures	SEFA materially correct, no compliance issues identified over three major federal programs tested



# Communication with Those Charged with Governance





## COMMUNICATION WITH GOVERNING BODY

# Planned Scope & Timing of the Audit

---

It is the auditor's responsibility to determine the overall audit strategy and the audit plan, including the nature, timing and extent of procedures necessary to obtain sufficient appropriate audit evidence and to communicate with those charged with governance an overview of the planned scope and timing of the audit.

## Our Comments

The planned scope and timing of the audit was communicated to the Board at the audit entrance meeting on April 20, 2020



# Significant Accounting Policies & Unusual Transactions

The auditor should determine that the Board is informed about the initial selection of and changes in significant accounting policies or their application. The auditor should also determine that the Board is informed about the methods used to account for significant unusual transactions and the effect of significant accounting policies in controversial or emerging areas for which there is a lack of authoritative guidance or consensus.

## Our Comments

Management has the responsibility for selection and use of appropriate accounting policies. The significant accounting policies used by the Agency are described in the Footnotes to the financial statements.

Throughout the course of an audit, we review changes, if any, to significant accounting policies or their application, and the initial selection and implementation of new policies. There were no changes to significant accounting policies for the year ended September 30, 2019

We believe management has selected and applied significant accounting policies appropriately and consistent with those of the prior year.



# Management Judgments & Accounting Estimates

The Board should be informed about the process used by management in formulating particularly sensitive accounting estimates and about the basis for the auditor's conclusions regarding the reasonableness of those estimates.

## Our Comments

Management's judgments and accounting estimates are based on knowledge and experience about past and current events and assumptions about future events. We apply audit procedures to management's estimates to ascertain whether the estimates are reasonable under the circumstances and do not materially misstate the financial statements.

Significant management estimates impacting the financial statements include the following: Valuation and collectability of long-term notes receivable and interest receivable, and useful lives of capital assets.

We deemed them to be reasonable.



## COMMUNICATION WITH GOVERNING BODY

# Key Financial Statement Disclosures

The disclosures in the financial statements are consistent, clear and understandable. Certain financial statement disclosures are particularly sensitive because of their significance to financial statement users.

## Our Comments

The most sensitive disclosures are:

- Notes 2 and 3 – Cash and investments
- Note 6 – Notes and interest receivable
- Note 8 – Long-term debt
- Note 18 –COVID-19



# Difficulties Encountered in Performing the Audit

---

The Board should be informed of any significant difficulties encountered in dealing with management related to the performance of the audit.

## Our Comments

No significant difficulties were encountered during our audit.



# Significant Audit Adjustments & Unadjusted Differences Considered by Management To Be Immaterial

The Board should be informed of all significant audit adjustments arising from the audit.

Consideration should be given to whether an adjustment is indicative of a significant deficiency or a material weakness in the Agency's internal control over financial reporting, or in its process for reporting interim financial information, that could cause future financial statements to be materially misstated.

The Board should also be informed of uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented that were determined by management to be immaterial, both individually and in the aggregate, to the financial statements as a whole.

## Our Comments

There were no corrected audit adjustments.

There was one uncorrected audit adjustment for capital costs that were not properly accrued as of 9/30/19. Had this misstatement been corrected, current year assets and liabilities would increase by \$425,020.



# Potential Effect on the Financial Statements of Significant Risks & Exposures & Uncertainties

---

The Board should be adequately informed of the potential effect on the financial statements of significant risks and exposures and uncertainties that are disclosed in the financial statements.

## Our Comments

The Agency is subject to potential legal proceedings and claims that arise in the ordinary course of business, which are disclosed in the notes to the financial statements.



## COMMUNICATION WITH GOVERNING BODY

# Disagreements with Management

---

Disagreements with management, whether or not satisfactorily resolved, about matters that individually or in the aggregate could be significant to the Agency's financial statements, or the auditor's report.

## Our Comments

We are pleased to report that there were no disagreements with management.



## COMMUNICATION WITH GOVERNING BODY

# Deficiencies in Internal Control

---

Any material weaknesses and significant deficiencies in the design or operation of internal control that came to the auditor's attention during the audit must be reported to the Board.

### Our Comments

- Material weakness
  - None noted
- Significant deficiencies & non-compliance
  - Nothing to communicate



## COMMUNICATION WITH GOVERNING BODY

# Representations Requested of Management

We requested certain representations from management that are included in the management representation letter.

## Our Comments

We received the representation letter from management prior to issuing our reports.



# Management's Consultation with Other Accountants

In some cases, management may decide to consult about auditing and accounting matters. If management has consulted with other accountants about an auditing and accounting matter that involves application of an accounting principle to the Agency's financial statements or a determination of the type of auditor's opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts.

## Our Comments

We are not aware of any significant accounting or auditing matters for which management consulted with other accountants.



## COMMUNICATION WITH GOVERNING BODY

# Other Communications

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Report to the Board  
committee significant  
written communications  
between the auditor and  
client management.

## Our Comments

Other than the engagement letter,  
management representation letter, and  
communication to those charged with  
governance, there were no other  
significant communications.



## COMMUNICATION WITH GOVERNING BODY

# Best Practices Recommendations

- Ensuring all capital projects are properly accrued
- Provide management training to ensure procurement approval policies followed
- Establishing plan to draft the Agency's financial statements for audit in accordance with State's filing deadline



# Fraud & Noncompliance with Laws and Regulations

Fraud involving senior management and fraud (whether caused by senior management or other employees) that causes a material misstatement of the financial statements should be communicated. We are also required to communicate any noncompliance with laws and regulations involving senior management that come to our attention, unless clearly inconsequential.

## Our Comments

We have not become aware of any instances of fraud or noncompliance with laws and regulations.



# Recent Accounting Developments

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## New Standards

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Public-Private and Public-Public  
Partnerships and Availability  
Payment Arrangements [GASB 94]

**Primary objective is to improve financial reporting by addressing issues related to public-private and public-public partnership arrangements (PPPs).**

**A PPP is an arrangement in which a government contracts with an operator to provide public services by conveying control of the right to operate or use a nonfinancial asset for a period of time in an exchange or exchange-like transaction. Effective for fiscal years beginning after June 15, 2022, and all reporting periods thereafter.**



## New Standards

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Postponement of the Effective Dates  
of Certain Authoritative Guidance  
[GASB 95]

In light of the COVID-19 pandemic, GASB issued GASB 95, *Postponement of the Effective Dates of Certain Authoritative Guidance*, which is intended to provide relief to state and local governments. The proposal postponed the effective dates and provisions of the following pronouncements:

*GASB 83, Certain Retirement Obligations*

*GASB 84, Fiduciary Activities*

*GASB 87, Leases*

*GASB 88, Certain Disclosures Related to Debt, including Direct Borrowings and Direct Placements*

*GASB 89, Accounting for Interest Cost Incurred before the End of a Construction Period*

*GASB 90, Majority Equity Interests*

*GASB 91, Conduit Debt Obligations*

*GASB 92, Omnibus 2020*, paragraphs 6-10, 12

*GASB 93, Replacement of Interbank Offered Rates*, paragraphs 13 and 14

The pronouncements have been extended one year, except for GASB 87, which has been extended 18 months from the original effective dates



## New Standards

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Subscription-Based Information  
Technology Arrangements [GASB 96]

**Defines accounting and financial reporting for subscription-based information technology arrangements (SBITAs) for government end users.**

**Results in a right-to-use subscription asset and a corresponding subscription liability.**

**Provides the capitalization criteria for outlays other than subscription payments, including implementation costs of a SBITA and requires note disclosures regarding an SBITA. Effective for fiscal years beginning after June 15, 2022, and all reporting periods thereafter.**



## New Standards

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Certain Component Unit Criteria, and  
Accounting and Financial Reporting for  
Internal Revenue Code Section 457  
Deferred Compensation Plans [GASB  
97]

Increases consistency and comparability related to the reporting of fiduciary component units in circumstances in which a potential component unit does not have a governing board and the primary government performs the duties that a governing board typically would perform

Requires that a Section 457 plan be classified as either a pension plan or an other employee benefit plan depending on whether the plan meets the definition of a pension plan and clarifies that Statement 84, as amended, should be applied to all arrangements organized under IRC Section 457 to determine whether those arrangements should be reported as fiduciary activities.



## INDUSTRY FOCUS

# An Array of Resources

In today's fast-paced world, we know how precious your time is. We also know that knowledge is key. These resources offer what you need to know, when you need to know it, and in the format that fits your life.



### Articles & Alerts

Industry-specific insight and important tax and assurance updates



### Webcasts

On demand and live sessions with our professionals on technical and timely topics



### Reports & Guides

A more in-depth look at significant changes and subjects across the accounting landscape



# Contact Us

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THANK  
YOU





# BOARD OF COMMISSIONERS AGENDA ITEM

**BOARD MEETING DATE:** 09/30/2020

**AGENDA TITLE:** In the Matter of Adopting the 2020-2021 Budget

**DEPARTMENT:** Finance

**CONTACT :** Jeff Bridgens, Finance Director

**EXT:** 2525

**PRESENTER:** Jeff Bridgens, Finance Director

**EXT:** 2525

**ESTIMATED TIME :** 50 minutes

- ☒ **ORDER/RESOLUTION**
- ☐ **PUBLIC HEARING/ORDINANCE**
- ☐ **DISCUSSION OR PRESENTATION (NO ACTION)**
- ☐ **APPOINTMENTS**
- ☐ **REPORT**
- ☐ **PUBLIC COMMENT ANTICIPATED**

**Approval Signature**

**EXECUTIVE DIRECTOR:**

A handwritten signature in black ink, appearing to be "J. Bridgens", is written over a horizontal line.

**DATE:** 9/22/20

**LEGAL STAFF :**

**DATE:**

**MANAGEMENT STAFF:**

**DATE:**



## **HOMES FOR GOOD MEMORANDUM**

**TO:** Homes for Good Board of Commissioners

**FROM:** Jeff Bridgens, Finance Director  
Jacob Fox, Executive Director

**AGENDA ITEM TITLE:** ORDER 20-30-09-01H/In the Matter of Adopting the 2020-2021 Budget

**AGENDA DATE:** September 30<sup>th</sup>, 2020

### **I MOTION**

It is moved that the Order be approved which adopts the Agency fiscal year 2021 Budget.

### **II ISSUE**

It is necessary for the board to adopt the Homes for Good Housing Agency's fiscal year 2021 Budget.

### **III DISCUSSION**

#### **A. Background**

This Order approves the Homes for Good Housing Agency's budget for the fiscal year beginning October 1, 2020.

#### **B. Analysis**

The fiscal year 2021 Budget Document (Budget Document) presents the Homes for Good Housing Agency's (Agency) Budget for the fiscal year October 1, 2020 through September 30, 2021. The Budget Document provides summary information about distinct activities, as well as the agency as a whole. The Budget Document also moves us forward on our strategic initiative to expand our communication capacity and to increase the Homes for Good's Board understanding of our financial opportunities and challenges. The Budget Document is organized by four broad groupings consisting of Community Services, Housing and Rent Assistance and the Central Office Cost Center. The 2021 Homes for Good Housing Agency's budget is \$1,849,900 higher than the previous year's budget.

**Rent Assistance** consists of Homes for Good Housing Choice Voucher (HCV) program and VASH (Veterans Assistance) Voucher program, which together comprise significant operations of the agency. For FY21, the Rent Assistance budgeted expenses total 25,551,700, an increase over the prior year budget of \$3,830,700. The increase is expected based upon increased housing assistance payments and additional funding provided by the CARES Act. The long-range financial planning section of the budget

document includes a detailed information about voucher utilization and program reserves.

**Housing** includes 598 units of Public Housing and multi-housing. This budget presents budgets for each of the nine separate public housing complexes and for each of the three separate groups of public housing scattered sites (Eugene, Springfield and Veneta). The Housing Division also includes eleven other multi-family housing complexes with a total of 566 units; four complexes are managed by Homes for Good staff and seven by a third-party management company. The principal revenues for the Agency's property consist of tenant rents and HUD assistance. The fiscal year 2021 housing budgets collectively are approximately \$360,000 more than the fiscal year 2020 budget primarily due to increased personnel services expense.

**Community Services** budgets include the Agency's Real Estate Development operations and grant funded resident enhancement programs. Often the clients who use these services reside in Homes for Good housing or receive rent assistance through the voucher programs. Finally, Community Services includes energy services operations and certain commercial leasing activities. The overall budget totals for Community Services may vary widely from year-to-year depending on the Agency's real estate development activities. RAD Phase II is expected to significantly impact the Agency by the continued conversion of scattered site homes into newer developments.

The **Central Office Cost Center (COCC)** accounts for Homes for Good administration and overhead activities. Revenues of the COCC include management fees, bookkeeping fees, and asset management fees that are charged to the public housing complexes, multi-family complexes and a per voucher fee to rent assistance. The revenue also includes fees for service for maintenance. Fees for service are based on the anticipated needs of property managers. The COCC includes the operations for a full-year for the Agency's newly remodeled administrative building.

### **Reserve Information**

Homes for Good carries reserve balances for many of the activities in the budget. Restricted reserves represent resources having externally imposed constraints on the use them by grantors, contributors, creditors, investors, other governments or any applicable legislation. Unrestricted reserves represent resources that have not been restricted and may be strategically invested. However unrestricted reserves may be limited to use in a specific program. For example, the Housing Choice Voucher unrestricted reserve may be used for any purpose in the HCV program, but may not be used outside the HCV program. Very few Homes for Good reserves are totally unrestricted, meaning that the funds can be used for any purpose in any program.

### **Budgetary Basis**

Homes for Good budgets are developed on a cash basis and therefore do not contain non-cash expenses such as depreciation expense. The budgetary basis is a different basis of accounting than used for preparation of Homes for Good's audited financial statements.

### **Significant Budget Highlights**

Homes for Good's significant initiatives for fiscal year 2021 include the following:

*Real Estate Development:* Real estate development continues to be a focus of Homes for Good in 2021. The sale of scattered sites is expected to generate significant proceeds totaling an estimated \$4,500,000 for housing purposes. We note however that under RAD these units are converted to vouchers under the Housing Choice Voucher program of HUD.

*New Administrative Building* - Homes for Good purchased the building at West 13th Avenue in Eugene in September 2017 and sold the building at 177 Day Island Road in July 2018. Remodeling of this space started in July 2019 and was available for use by Homes for Good beginning in April 2020. The

operations of 100 W. 13<sup>th</sup> were moved to include within the COCC instead of Community Services because the building will serve as Homes for Good's primary operational offices starting in 2020. Building rents, paid by various operations of the Agency, will serve as the primary repayment source for the building's mortgage.

*CARES Act Funding* – This budget contains certain funding provided by the CARES Act in 2020. The Agency expects to recognize approximately \$700,000 of CARES Act funding during 2021 in its rent assistance operations and another \$200,000 in its public housing portfolio. These funds are non-recurring in nature and provided for specific designated purposes relating to the Agency's response to the COVID-19 pandemic.

## **Conclusion**

The proposed fiscal year 2021 budget supports the Agency's ongoing commitment to provide quality affordable housing and our desire to make continued progress on our strategic initiatives. Homes for Good plays a significant role in implementing public policy goals intended to provide solutions for people experiencing homelessness and other barriers to housing in our community that without our support will not be able to access an affordable home.

### **A. Alternatives/Options**

The Board can either approve the proposed budget Motion as recommended or make changes before adopting the budget.

### **B. Recommendation**

Approval of the proposed Motion is recommended.

### **C. Timing**

Upon Board approval, the proposed budget will become effective on October 1, 2020.

## **IV IMPLEMENTATION/FOLLOW-UP**

None required.

## **V ATTACHMENTS**

Budget Document

# BUDGET DOCUMENT FOR FISCAL YEAR 2021

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🌐 [www.homesforgood.org](http://www.homesforgood.org)

📍 100 W 13th Ave Eugene, OR 97401

✉ [info@homesforgood.org](mailto:info@homesforgood.org)





# Homes. People. Partnerships. Good.

Homes for Good is Lane County's housing agency and our primary work is to help low-income residents with the logistics of affordable housing. At a higher level, we are neighbors united to get every Lane County resident who needs help, into a home.

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## **HOMES FOR GOOD BOARD OF COMMISSIONERS**

Char Reavis	Board Chair/Appointed Commissioner
Michelle Thurston	Appointed Commissioner
Jay Bozievich	Lane County Commissioner
Pat Farr	Lane County Commissioner
Joe Berney	Board Vice-Chair/Lane County Commissioner
Heather Buch	Lane County Commissioner
Pete Sorenson	Lane County Commissioner

## **LEADERSHIP TEAM**

Jacob Fox	Executive Director
Jeff Bridgens	Finance Director
Steve Ochs	Real Estate Development Division Director
Beth Ochs	Rent Assistance Division Director
Wakan Alferes	Supportive Housing Division Director
Bailey McEuen	Human Resources Director
Steve Jole	Energy Services Division Director
Ela Kubok	Communications Director
Curtis Wyant	Information Technology Director

# EXECUTIVE DIRECTOR'S MESSAGE



Homes, People, Partnership, Good are the core values of our transformative organization. Our budget process, and this clear and concise budget document, reflect our priorities and our commitment to transforming our community by providing a home to the people in Lane County that need it the most. What we love most about our budget document is that it is grounded in budgeting best practices, it is easy to understand, it is infused with images of our employees and the people we serve, and it contains data that helps the reader understand the impact we have in Lane County.

Needless to say, 2020 has been a year of historic challenges. In March of 2020, the COVID-19 Pandemic compelled the Homes for Good Leadership Team to fundamentally changed our organizational structure. In May of 2020, the entire Nation was yet again witness to the systemic history of police brutality towards Black Americans when George Floyd was killed by Minneapolis Police Department officer which resulted in protests focused on racial justice in our Nation and in Lane County. In September of 2020, the State of Oregon faced another tragedy as massive wildfires raced across numerous counties including Lane County.

Because of the prudent investment of time and resources on the part of Homes for Good Board of Commissioners and staff over the past 5 years the organization has never been more resilient and financially capable. Key drivers of our financial stability include proactive management of our federally funded housing/programs in close coordination with the team from the Department of Housing and Urban Development (HUD), an unprecedented level of real estate development projects and COVID-19 Cares Act funding that we have received from HUD.

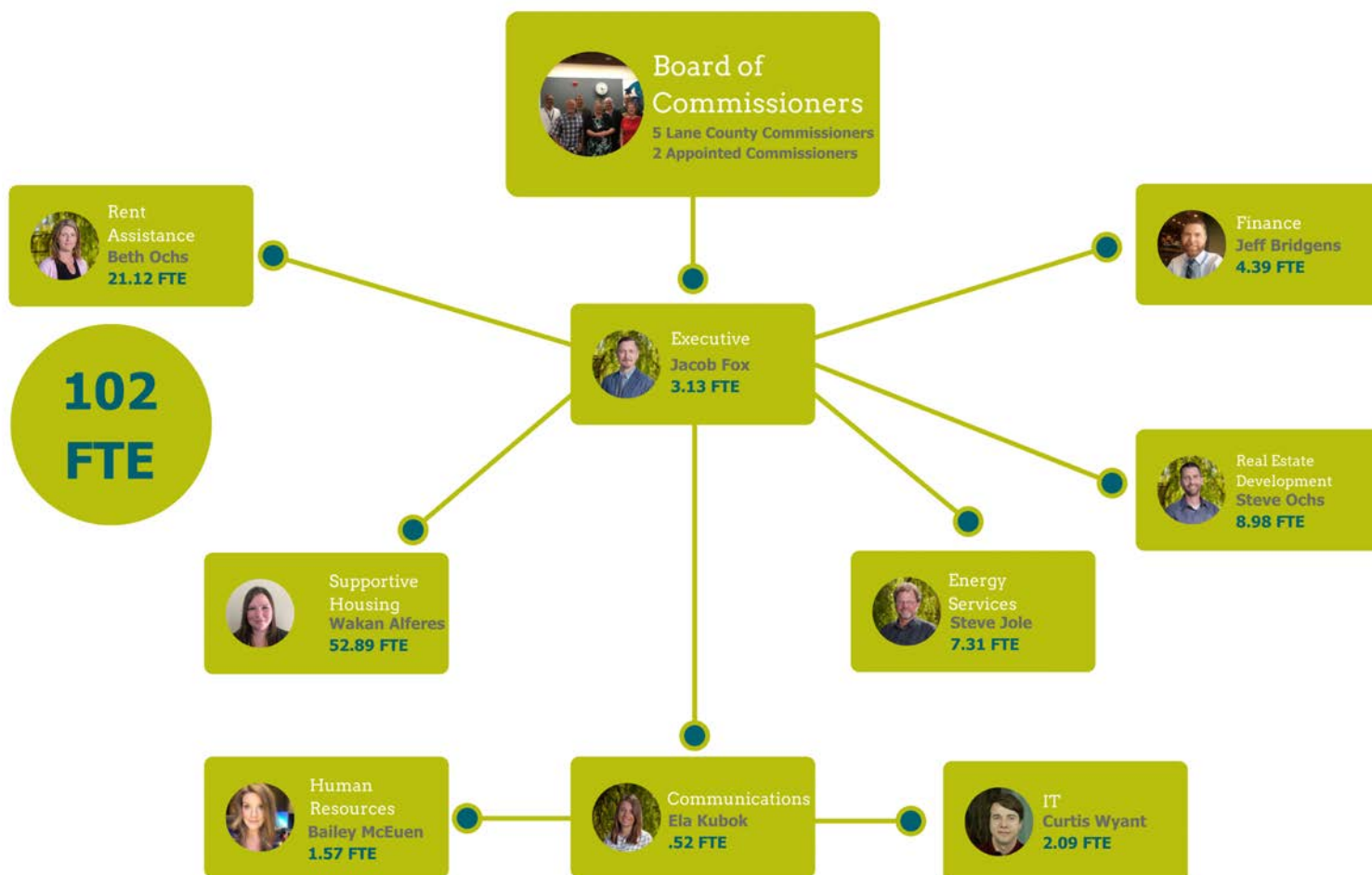
There are three overarching themes that helped guide the development of our FY21 Budget. First, an organizational priority to continue Diversity, Equity, and Inclusion Education and the launch of the Homes for Good Equity Strategy Team. This includes a commitment from Leadership and Staff to increase employment opportunities and promotion opportunities for people from communities that have been, and are being, marginalized in our community as well as increased contracting opportunities for businesses owned by people of color and women. Second, an organizational priority to continue developing affordable housing at scale with an emphasis on partnering with Lane County and other local jurisdictions to increase the number of Permanent Supportive Housing to provide a home to people experiencing homelessness. Third, an organizational priority to continue refinement of our Continuity of Operations Plan and the development of key Annexes to this plan to address high consequence diseases, earthquakes, wildfires and weather events like snowstorms.

In the following pages, we present the Home for Good budget for the fiscal year October 1, 2020, through September 30, 2021. We are supplying information about each distinct activity, as well as summaries by division and agency-wide information, by providing a clear and meaningful story of Homes for Good's operations and their revenues/expenses. This budget document is a reflection of our expanding communications capacity and its transparency will increase our community's understanding of our financial opportunities and challenges.

**JACOB FOX**

**Executive Director**

# ORGANIZATIONAL CHART



# BUDGET SUMMARY

	2019 BUDGET	2019 ACTUAL	2020 BUDGET	2020 PROJECTED	2021 BUDGET
Beginning Restricted Reserves	\$ 8,023,282	\$ 3,343,640	\$ 11,308,400	\$ 9,511,100	\$ 2,431,194
Beginning Unrestricted Reserves	5,944,262	13,993,225	12,132,300	16,694,800	17,725,706
Total Beginning Reserves	13,967,544	17,336,865	23,440,700	26,205,900	20,156,900
Revenue	42,081,158	42,579,413	63,750,900	41,337,400	48,742,300
Expenses					
Personnel Services	7,818,975	7,664,902	7,956,000	7,416,200	8,192,800
Materials & Services	27,319,500	28,503,015	31,009,800	32,349,600	32,428,500
Overhead	359,176	261,536	332,900	268,300	527,300
Total Expenses	35,497,651	36,429,453	39,298,700	40,034,100	41,148,600
Net Change	6,583,507	6,149,960	24,452,200	1,303,300	7,593,700
Other Resources					
Capital Outlay	(38,537,241)	(5,750,785)	(25,424,600)	(6,968,300)	(2,677,700)
Reserves	(205,930)	(122,973)	1,179,600	2,064,800	(4,596,400)
Debt Issuance	33,229,608	10,159,451	14,130,000	881,600	1,130,000
Debt Service	(432,543)	(3,997,218)	(14,134,800)	(1,292,800)	(966,900)
Inter-Program Transfers In	1,102,445	4,481,002	808,800	580,300	422,500
Inter-Program Transfers Out	(1,102,445)	(2,050,428)	(808,500)	(2,570,600)	(422,500)
Other Resources Provided (Used)	(5,946,106)	2,719,049	(24,249,500)	(7,305,000)	(7,111,000)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	637,401	8,869,009	202,700	(6,001,700)	482,700
Ending Restricted Reserves	8,043,071	9,511,351	14,890,800	2,431,194	1,906,900
Ending Unrestricted Reserves	6,561,872	16,694,522	8,752,600	17,725,706	18,732,700
Total Ending Reserves	\$ 14,604,943	\$ 26,205,873	\$ 23,643,400	\$ 20,156,900	\$ 20,639,600
Program Expenses					
Community Services	\$ 4,617,279	\$ 4,859,373	\$ 6,814,700	\$ 4,270,700	\$ 4,682,800
Housing	7,763,690	8,020,948	7,375,600	7,692,700	7,736,000
Rent Assistance	19,790,380	20,371,245	21,721,000	25,237,000	25,551,700
COCC	3,326,302	3,177,887	3,387,400	2,833,700	3,178,100
Total Program Expenses	35,497,651	36,429,453	39,298,700	40,034,100	41,148,600
Program Other Resources					
Community Services	(4,222,007)	(2,460,827)	(14,596,900)	(807,100)	(6,187,000)
Housing	(1,886,007)	(3,326,821)	(1,822,000)	(2,080,800)	(1,419,400)
Rent Assistance	(80,000)	(28,685)	(25,000)	1,773,900	883,500
COCC	241,908	8,535,382	(7,805,600)	(6,191,000)	(388,100)
Total Other Resources	\$ (5,946,106)	\$ 2,719,049	\$(24,249,500)	\$ (7,305,000)	\$ (7,111,000)
Full-Time Equivalent Positions	98.00	94.00	96.50	92.00	102.00

# RENT ASSISTANCE DIVISION

	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ 67,314	\$ -	\$ 308,900	\$ -
Beginning Unrestricted Reserves	1,814,650	1,938,599	1,983,500	1,756,200	2,021,000
Total Beginning Reserves	2,005,900	2,005,913	1,983,500	2,065,100	2,021,000
Revenue	19,690,180	20,459,154	21,746,000	23,419,000	24,540,800
Expenses					
Personnel Services	1,598,841	1,616,913	1,652,200	1,600,000	1,639,600
Materials & Services	18,191,539	18,754,332	20,068,800	23,637,000	23,912,100
Overhead	-	-	-	-	-
Total Expenses	19,790,380	20,371,245	21,721,000	25,237,000	25,551,700
Net Change	(100,200)	87,909	25,000	(1,818,000)	(1,010,900)
Other Resources					
Capital Outlay	(80,000)	(28,685)	(25,000)	-	-
Reserves	-	-	-	1,773,900	883,500
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	(80,000)	(28,685)	(25,000)	1,773,900	883,500
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(180,200)	59,224	-	(44,100)	(127,400)
Ending Restricted Reserves	-	308,948	-	-	-
Ending Unrestricted Reserves	1,634,450	1,756,189	1,983,500	2,021,000	1,893,600
Total Ending Reserves	\$ 1,983,500	\$ 2,065,137	\$ 1,983,500	\$ 2,021,000	\$ 1,893,600



# Rent Assistance



The Rent Assistance Division administers 2,784 Section 8 Tenant-Based Vouchers, 269 Veterans Administration Supportive Housing (VASH) vouchers, 33 Mainstream Vouchers, 33 Project-Based Vouchers (PBV), and 12 RAD Project Based Vouchers. The administration of these vouchers includes initial and ongoing eligibility reviews and periodic inspections of all units. In addition, the Rent Assistance Division has a Landlord Liaison and Division Analyst. The Landlord Liaison provides outreach and education to landlords in our community. The Division Analyst ensures compliance with HUD regulations and policies as well as compiles a variety of data points which allows the Rent Assistance Division to make data-driven decisions.

# COMMUNITY SERVICES

	<u>2019 BUDGET</u>	<u>2019 ACTUAL</u>	<u>2020 BUDGET</u>	<u>2020 PROJECTED</u>	<u>2021 BUDGET</u>
Beginning Restricted Reserves	\$ 3,181,469	\$ 1,509,687	\$ 1,853,500	\$ 1,435,900	\$ 852,000
Beginning Unrestricted Reserves	1,748,381	11,030,879	8,924,200	12,307,300	12,807,000
Total Beginning Reserves	4,929,850	12,540,566	10,777,700	13,743,200	13,659,000
Revenue	9,797,523	8,522,795	29,588,500	4,994,300	10,894,500
Expenses					
Personnel Services	1,691,785	1,677,108	1,957,300	1,643,400	1,861,500
Materials & Services	2,569,560	2,920,729	4,524,500	2,359,000	2,294,000
Overhead	355,934	261,536	332,900	268,300	527,300
Total Expenses	4,617,279	4,859,373	6,814,700	4,270,700	4,682,800
Net Change	5,180,244	3,663,422	22,773,800	723,600	6,211,700
Other Resources					
Capital Outlay	(33,286,000)	(891,596)	(15,125,000)	(34,000)	(1,620,000)
Reserves	(22,000)	(34,407)	1,461,300	(22,000)	(5,296,100)
Debt Issuance	29,345,000	-	13,130,000	-	1,130,000
Debt Service	(7,629)	(53,166)	(13,470,000)	(54,000)	(74,000)
Inter-Program Transfers In	219,321	136,075	215,300	552,900	95,600
Inter-Program Transfers Out	(470,699)	(1,617,733)	(808,500)	(1,250,000)	(422,500)
Other Resources Provided (Used)	(4,222,007)	(2,460,827)	(14,596,900)	(807,100)	(6,187,000)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	958,237	1,202,595	8,176,900	(83,500)	24,700
Ending Restricted Reserves	3,041,258	1,435,841	13,435,900	852,000	130,900
Ending Unrestricted Reserves	2,846,828	12,307,319	5,518,700	12,807,000	13,552,800
Total Ending Reserves	\$ 5,888,086	\$ 13,743,160	\$ 18,954,600	\$ 13,659,000	\$ 13,683,700



# Development

Homes for Good's Real Estate Development Division builds sustainable and affordable homes throughout Lane County. Homes for Good's Development Team activities include new construction projects, acquisition, rehab, and substantial capital repairs for existing affordable properties. Development fees received from projects help to fund pre-development activities and other programs at Homes for Good. Homes for Good has been aggressively tackling the affordable housing crisis and need for additional Permanent Supportive Housing units in our community. In this fiscal year Homes for Good will have 7 developments totaling 284 units under construction or just completing construction. Of these 284 units, 130 are Permanent Supportive Housing Units for our community members that need the support the most. Homes for Good will continue to work with community partners to build much needed housing working to serving rural communities in Lane County as well.

The Development Team is working closely with the Supportive Housing Division to convert Public Housing units through the Rental Assistance

Demonstration Program (RAD). The objective of RAD is to move housing subsidy from the public housing program to the Section 8 Program. Homes for Good is in the process of converting 100 Public Housing Scattered Site units into two new developments and selling the 100 units. RAD conversions will have a significant positive impact on the Homes for Good budget over the next few years as it will allow for the sale of the scattered sites with the proceeds to be used for replacement housing, preservation efforts, and other affordable housing activities.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ 3,100,000	\$ 1,428,183	\$ 13,332,900	\$ 1,383,800	\$ 750,000
Beginning Unrestricted Reserves	1,117,325	10,407,090	4,710,700	12,123,500	12,165,300
Total Beginning Reserves	4,217,325	11,835,273	18,043,600	13,507,300	12,915,300
Revenue	6,367,442	5,242,321	25,976,000	1,201,300	7,422,600
Expenses					
Personnel Services	694,164	668,566	837,800	614,600	812,200
Materials & Services	275,322	426,072	2,152,900	171,700	233,700
Overhead	125,227	93,567	121,400	108,100	214,200
Total Expenses	1,094,713	1,188,205	3,112,100	894,400	1,260,100
Net Change	5,272,729	4,054,116	22,863,900	306,900	6,162,500
Other Resources					
Capital Outlay	(33,141,000)	(764,331)	(14,965,000)	(34,000)	(1,490,000)
Reserves	-	-	1,434,000	-	(5,250,000)
Debt Issuance	29,200,000	-	13,000,000	-	1,000,000
Debt Service	44,998	-	(13,400,000)	-	-
Inter-Program Transfers In	-	-	-	385,100	-
Inter-Program Transfers Out	(470,699)	(1,617,733)	(808,500)	(1,250,000)	(422,500)
Other Resources Provided (Used)	(4,366,701)	(2,382,064)	(14,739,500)	(898,900)	(6,162,500)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	906,028	1,672,052	8,124,400	(592,000)	-
Ending Restricted Reserves	2,899,000	1,383,783	13,332,900	750,000	-
Ending Unrestricted Reserves	2,224,352	12,123,542	4,710,700	12,165,300	12,915,300
Total Ending Reserves	\$ 5,123,352	\$ 13,507,325	\$ 26,168,000	\$ 12,915,300	\$ 12,915,300

# The Bus Barn

The Bus Barn Property is located on Oak Street in the Market District of Eugene, OR and consists of two buildings: the historic Bus Barn building and the Oak Court Building. Oak Street Child Development, a key downtown childcare service is located in the Bus Barn building, and Chambers Construction is using a portion of the Oak Court building for construction offices for the neighboring Market District Commons construction. Homes for Good has executed a 99 year lease on the property from Lane County, in the short term the property will be leased to non-profit and commercial business with the possibility of providing services for affordable housing in the long term.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	-	-	-
Total Beginning Reserves	-	-	-	-	-
Revenue	-	-	63,000	-	62,500
Expenses					
Personnel Services	-	-	-	-	-
Materials & Services	-	-	39,000	-	38,500
Overhead	-	-	-	-	-
Total Expenses	-	-	39,000	-	38,500
Net Change	-	-	24,000	-	24,000
Other Resources					
Capital Outlay	-	-	(130,000)	-	(130,000)
Reserves	-	-	-	-	-
Debt Issuance	-	-	130,000	-	130,000
Debt Service	-	-	(20,000)	-	(20,000)
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	(20,000)	-	(20,000)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	-	4,000	-	4,000
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	-	4,000	-	4,000
Total Ending Reserves	\$ -	\$ -	\$ 4,000	\$ -	\$ 4,000

# Signpost House

Signpost House provides sixteen (16) units of supported housing off 7th Avenue in Eugene, OR in partnership with ShelterCare.



	<b>2019 BUDGET</b>	<b>2019 ACTUAL</b>	<b>2020 BUDGET</b>	<b>2020 PROJECTED</b>	<b>2021 BUDGET</b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	274,288	260,589	279,100	161,600	158,100
Total Beginning Reserves	274,288	260,589	279,100	161,600	158,100
Revenue	94,000	105,000	93,000	70,100	90,500
Expenses					
Personnel Services	13,754	13,880	8,300	3,700	2,600
Materials & Services	52,156	62,638	19,200	69,900	63,800
Overhead	648	-	-	-	-
Total Expenses	66,558	76,518	27,500	73,600	66,400
Net Change	27,442	28,482	65,500	(3,500)	24,100
Other Resources					
Capital Outlay	(145,000)	(127,265)	-	-	-
Reserves	-	-	-	-	(24,100)
Debt Issuance	145,000	-	-	-	-
Debt Service	(230)	(220)	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	(230)	(127,485)	-	-	(24,100)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	27,212	(99,003)	65,500	(3,500)	-
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	301,500	161,586	344,600	158,100	158,100
Total Ending Reserves	\$ 301,500	\$ 161,586	\$ 344,600	\$ 158,100	\$ 158,100



# Heeran Center

The Heeran Center is a sixteen (16) bed Secure Residential Treatment Facility off Coburg road in Eugene, OR serving the needs of individuals who are recovering from a mental illness. This center offers therapeutic treatment services on a 24/7 basis. Care services are provided by ColumbiaCare, Inc. The Heeran Center also provides space for the Trauma Healing Project, offering wellness services facilitated by advanced healing arts practitioners, and is open to all in our community.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ 103,500	\$ 81,504	\$ 103,500	\$ 52,100	\$ 74,100
Beginning Unrestricted Reserves	393,900	395,813	393,900	444,000	432,600
Total Beginning Reserves	<u>497,400</u>	<u>477,317</u>	<u>518,000</u>	<u>496,100</u>	<u>506,700</u>
Revenue	262,000	263,673	262,000	265,400	269,000
Expenses					
Personnel Services	-	6,899	-	-	-
Materials & Services	196,900	150,640	196,900	178,800	180,900
Overhead	-	-	-	-	-
Total Expenses	<u>196,900</u>	<u>157,539</u>	<u>196,900</u>	<u>178,800</u>	<u>180,900</u>
Net Change	<u>65,100</u>	<u>106,134</u>	<u>65,100</u>	<u>86,600</u>	<u>88,100</u>
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	(34,407)	-	(22,000)	(22,000)
Debt Issuance	-	-	-	-	-
Debt Service	(50,000)	(52,946)	(50,000)	(54,000)	(54,000)
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	<u>(50,000)</u>	<u>(87,353)</u>	<u>(50,000)</u>	<u>(76,000)</u>	<u>(76,000)</u>
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	<u>15,100</u>	<u>18,781</u>	<u>15,100</u>	<u>10,600</u>	<u>12,100</u>
Ending Restricted Reserves	103,000	52,058	103,000	74,100	103,000
Ending Unrestricted Reserves	409,500	444,040	409,500	432,600	415,800
Total Ending Reserves	<u>\$ 512,500</u>	<u>\$ 496,098</u>	<u>\$ 512,500</u>	<u>\$ 506,700</u>	<u>\$ 518,800</u>

# Family Shelter House

In partnership with ShelterCare, Family Shelter House provides twenty-eight (28) units of emergency shelter and supportive services for families with children who are homeless. The Family Shelter House is located off Hwy 99 in Eugene, OR.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	7,300	41,102	50,500	50,300	61,000
Total Beginning Reserves	7,300	41,102	50,500	50,300	61,000
Revenue	12,000	14,587	12,000	15,500	13,500
Expenses					
Personnel Services	1,609	1,940	5,100	1,500	1,600
Materials & Services	3,224	3,450	-	3,300	3,300
Overhead	324	-	-	-	-
Total Expenses	5,157	5,390	5,100	4,800	4,900
Net Change	6,843	9,197	6,900	10,700	8,600
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	6,843	9,197	6,900	10,700	8,600
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	14,143	50,299	57,400	61,000	69,600
Total Ending Reserves	\$ 14,143	\$ 50,299	\$ 57,400	\$ 61,000	\$ 69,600

# ROSS

## Resident Opportunities and Supportive Services

The Homes for Good Resident Services Team works to connect our residents and participants with needed resources in the community. In partnership with community providers, government entities, and resident volunteers, Homes for Good facilitates numerous programs that support residents in meeting their basic needs, increasing housing stability, improving health outcomes, and building economic self-sufficiency. The Resident Services Team is overseen by the Supportive Housing Division Director and is staffed by a Resident Services Manager, three (3) Resident Services Specialists, three (3) Family Self Sufficiency Program Coordinators, a Housing Liaison, and a Grants and Programs Specialist. Resident Services also oversees the Section 8 Home Ownership Program and coordinates the Resident Advisory Board (RAB).



	<b>2019 BUDGET</b>	<b>2019 ACTUAL</b>	<b>2020 BUDGET</b>	<b>2020 PROJECTED</b>	<b>2021 BUDGET</b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	(7,600)	-	-
Total Beginning Reserves	-	-	(7,600)	-	-
Revenue	82,000	388,172	88,400	82,700	80,000
Expenses					
Personnel Services	129,721	94,880	136,000	117,900	27,200
Materials & Services	24,924	331,796	72,200	25,000	52,900
Overhead	33,462	32,119	28,000	24,500	28,000
Total Expenses	188,107	458,795	236,200	167,400	108,100
Net Change	(106,107)	(70,623)	(147,800)	(84,700)	(28,100)
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	106,107	70,623	147,800	84,700	28,100
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	106,107	70,623	147,800	84,700	28,100
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	-	-	-	-
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	-	(7,600)	-	-
Total Ending Reserves	\$ -	\$ -	\$ (7,600)	\$ -	\$ -

# FSS

## Family Self-Sufficiency Program

The FSS Program is offered by Homes for Good to help participants of Public Housing and Housing Choice Voucher programs get support, set goals, save money and work towards greater economic self-sufficiency. Participants work with a coordinator to create an individualized training and services plan to make big and small changes in their lives. Participants are eligible to establish a tax free escrow account that is contributed to when their rent increases due to changes in earned income. Families who meet the program goals receive the money in this account, with the average graduate receiving just over \$5,000.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	-	-	-
Total Beginning Reserves	-	-	-	-	-
Revenue	313,771	315,313	324,900	259,600	324,900
Expenses					
Personnel Services	163,346	254,235	213,400	247,300	213,400
Materials & Services	110,619	55,909	78,800	35,000	78,800
Overhead	50,246	41,717	44,300	40,000	44,300
Total Expenses	324,211	351,861	336,500	322,300	336,500
Net Change	(10,440)	(36,548)	(11,600)	(62,700)	(11,600)
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	10,440	36,548	11,600	62,700	11,600
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	10,440	36,548	11,600	62,700	11,600
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	-	-	-	-
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	-	-	-	-
Total Ending Reserves	\$ -	\$ -	\$ -	\$ -	\$ -



# Shelter Plus Care and Madrone Grants



## HIVAlliance



The Shelter Plus Care and Madrone grants are through the Continuum of Care that provides rent assistance and services to homeless individuals and families who have at least one person in the household that qualifies as disabled. Referrals are taken from the Centralized Waiting List held by Lane County Health and Human Services Dept. and connects them to service providers that include ShelterCare, Laurel Hill Center, Willamette Family Treatment Services and the HIV Alliance/OHOP. These grants support housing for roughly 75 households annually.

	<b>2019 BUDGET</b>	<b>2019 ACTUAL</b>	<b>2020 BUDGET</b>	<b>2020 PROJECTED</b>	<b>2021 BUDGET</b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	(10,857)	(10,857)	4,800	-	-
Total Beginning Reserves	(10,857)	(10,857)	4,800	-	-
Revenue	802,019	569,754	817,000	606,500	817,000
Expenses					
Personnel Services	79,624	50,228	90,000	70,300	90,000
Materials & Services	749,471	531,884	767,400	542,200	767,400
Overhead	14,587	-	15,500	10,700	15,500
Total Expenses	843,682	582,112	872,900	623,200	872,900
Net Change	(41,663)	(12,358)	(55,900)	(16,700)	(55,900)
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	41,663	23,216	55,900	16,700	55,900
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	41,663	23,216	55,900	16,700	55,900
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	10,858	-	-	-
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	(10,857)	-	4,800	-	-
Total Ending Reserves	\$ (10,857)	\$ -	\$ 4,800	\$ -	\$ -

**Note: The budgets for Shelter Plus Care and Madrone (Continuum of Care) are now combined**



# The Way Home (Pay for Success)

The Way Home is a grant in partnership with Sponsors Inc., Lane County Parole and Probation, Homes for Good, and Third Sector. This grant provides housing and services to men and women who have come out of the corrections system and are working to reintegrate into the community and supports those with the highest chance of recidivism. The intent of this grant is to show that stable, affordable housing can lower recidivism rates for this population and in the process save community service dollars.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	(4,600)	-	-
Total Beginning Reserves	-	-	(4,600)	-	-
Revenue	49,729	-	-	-	39,000
Expenses					
Personnel Services	42,125	-	39,000	-	39,000
Materials & Services	310	-	-	-	-
Overhead	7,294	-	-	-	-
Total Expenses	49,729	-	39,000	-	39,000
Net Change	-	-	(39,000)	-	-
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	-	(39,000)	-	-
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	-	(43,600)	-	-
Total Ending Reserves	\$ -	\$ -	\$ (43,600)	\$ -	\$ -

# Mainstream Barrier Busters

The Mainstream Barrier Busters grant is a pass through grant from Lane County.



	<u>2019 BUDGET</u>	<u>2019 ACTUAL</u>	<u>2020 BUDGET</u>	<u>2020 PROJECTED</u>	<u>2021 BUDGET</u>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	-	-	-
Total Beginning Reserves	-	-	-	-	-
Revenue	-	-	15,600	-	15,600
Expenses					
Personnel Services	-	-	-	-	-
Materials & Services	-	-	14,500	-	14,500
Overhead	-	-	1,100	-	1,100
Total Expenses	-	-	15,600	-	15,600
Net Change	-	-	-	-	-
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	-	-	-	-
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	-	-	-	-
Total Ending Reserves	\$ -	\$ -	\$ -	\$ -	\$ -

# VA Homeless Grant and Per Diem Program

VA



U.S. Department of Veterans Affairs

The VA's Homeless Providers Grant and Per Diem Program is offered annually (as funding permits) by the Department of Veterans Affairs Health Care for Homeless Veterans (HCHV) Programs to fund community agencies providing services to homeless Veterans. The purpose is to promote the development and provision of supportive housing and/or supportive services with the goal of helping homeless Veterans achieve residential stability, increase their skill levels and/or income, and obtain greater self-determination. This is a Federal grant that is passed through Homes for Good to local organizations.

	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	-	-	-
Total Beginning Reserves	-	-	-	-	-
Revenue	150,200	167,729	150,200	150,000	150,000
Expenses					
Personnel Services	-	-	-	-	-
Materials & Services	150,200	167,729	150,200	150,000	150,000
Overhead	-	-	-	-	-
Total Expenses	150,200	167,729	150,200	150,000	150,000
Net Change	-	-	-	-	-
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	-	-	-	-
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	-	-	-	-
Total Ending Reserves	\$ -	\$ -	\$ -	\$ -	\$ -

# EHA Grant

## Emergency Housing Assistance

The Emergency Housing Assistance (EHA) grant provides State funds to supplement effective existing local programs and/or establish new programs designed to prevent and reduce homelessness in the veteran population. Funds are available for emergency shelter, transitional housing, rapid re-housing, homelessness prevention, supportive housing services, and veteran's housing assistance.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	-	(3,700)	-
Total Beginning Reserves	-	-	-	(3,700)	-
Revenue	18,400	15,615	18,400	12,100	18,400
Expenses					
Personnel Services	2,400	5,680	-	2,700	-
Materials & Services	16,000	16,375	16,000	9,400	16,000
Overhead	-	-	2,400	-	2,400
Total Expenses	33,400	22,055	18,400	12,100	18,400
Net Change	-	(6,440)	-	-	-
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	2,740	-	3,700	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	2,740	-	3,700	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	(3,700)	-	3,700	-
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	(3,700)	-	-	-
Total Ending Reserves	\$ -	\$ (3,700)	\$ -	\$ -	\$ -

# Homes for Good Foundation

The Homes for Good Foundation is Homes for Good's 503(c). It was created in 2014 as a potential source of revenue from grants that could be used for resident services programs. The Homes for Good Foundation offers a student scholarship for Homes for Good residents and participants, and supports the Reading Program for kids living at our Public Housing complexes.

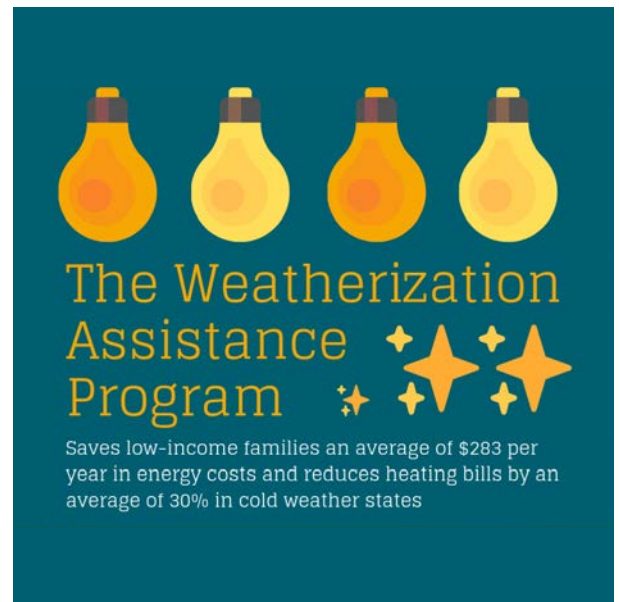


	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ 27,900
Beginning Unrestricted Reserves	(6,643)	(9,374)	(8,300)	(9,300)	-
Total Beginning Reserves	(6,643)	(9,374)	(8,300)	(9,300)	27,900
Revenue	2,500	4,318	3,000	32,000	3,000
Expenses					
Personnel Services	-	-	-	-	-
Materials & Services	1,745	7,266	3,000	4,100	3,000
Overhead	-	-	-	-	-
Total Expenses	1,745	7,266	3,000	4,100	3,000
Net Change	755	(2,948)	-	27,900	-
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	2,948	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	2,948	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	755	-	-	27,900	-
Ending Restricted Reserves	-	-	-	27,900	27,900
Ending Unrestricted Reserves	(5,888)	(9,374)	(8,300)	-	-
Total Ending Reserves	\$ (5,888)	\$ (9,374)	\$ (8,300)	\$ 27,900	\$ 27,900



# Energy Services

Homes for Good's Energy Services Division operates a Department of Energy Weatherization Assistance Program. In addition to making low-income Lane County residences more healthy and energy efficient, the Energy Services Division partners with Lane County's Health and Human Services, and local utilities to provide energy education as well as replacing non-working heating systems.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	7,213	(53,484)	47,200	(459,100)	-
Total Beginning Reserves	7,213	(53,484)	47,200	(459,100)	-
Revenue	1,765,167	1,436,313	1,765,000	2,299,100	1,588,500
Expenses					
Personnel Services	567,442	580,800	627,700	585,400	675,500
Materials & Services	1,102,645	1,166,970	1,014,400	1,169,600	691,200
Overhead	124,146	94,133	120,200	85,000	221,800
Total Expenses	1,794,233	1,841,903	1,762,300	1,840,000	1,588,500
Net Change	(29,066)	(405,590)	2,700	459,100	-
Other Resources					
Capital Outlay	-	-	(30,000)	-	-
Reserves	-	-	27,300	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	61,111	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	61,111	-	(2,700)	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	32,045	(405,590)	-	459,100	-
Ending Restricted Reserves	39,258	-	-	-	-
Ending Unrestricted Reserves	-	(459,074)	47,200	-	-
Total Ending Reserves	\$ 39,258	\$ (459,074)	\$ 47,200	\$ -	\$ -

# SUPPORTIVE HOUSING DIVISION

	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	1,849,813	1,766,639	1,454,900	1,579,000	1,579,194
Beginning Unrestricted Reserves	3,113,091	1,509,876	1,725,875	768,400	903,406
Total Beginning Reserves	4,962,904	3,276,515	3,180,775	2,347,400	2,482,600
Revenue	9,548,897	10,418,786	9,023,400	9,908,700	9,634,400
Expenses					
Personnel Services	2,163,256	2,188,981	2,116,000	2,070,300	2,334,600
Materials & Services	5,600,434	5,831,967	5,259,600	5,622,400	5,401,400
Overhead	-	-	-	-	-
Total Expenses	7,763,690	8,020,948	7,375,600	7,692,700	7,736,000
Net Change	1,785,207	2,397,838	1,647,800	2,216,000	1,898,400
Other Resources					
Capital Outlay	(5,121,241)	(3,664,148)	(1,224,600)	(2,145,300)	(1,057,700)
Reserves	(183,930)	(88,566)	(241,700)	312,900	(143,800)
Debt Issuance	3,840,000	956,451	-	881,600	-
Debt Service	(424,914)	(159,085)	(355,700)	(563,800)	(217,900)
Inter-Program Transfers In	4,078	61,222	-	27,400	-
Inter-Program Transfers Out	-	(432,695)	-	(593,600)	-
Other Resources Provided (Used)	(1,886,007)	(3,326,821)	(1,822,000)	(2,080,800)	(1,419,400)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(100,800)	(928,983)	(174,200)	135,200	479,000
Ending Restricted Reserves	1,925,553	1,579,229	1,454,900	1,579,194	1,776,000
Ending Unrestricted Reserves	2,896,899	768,303	1,479,800	903,406	1,185,600
Total Ending Reserves	<u>\$ 4,862,104</u>	<u>\$ 2,347,532</u>	<u>\$ 2,934,700</u>	<u>\$ 2,482,600</u>	<u>\$ 2,961,600</u>

# Laurelwood Homes

Laurelwood Homes, located on the Coast in Florence, OR offers twenty-nine (29): one-, two-, three- and four-bedroom single-story duplexes serving families including households with elderly or disabled person(s). Laurelwood features washer & dryer hookups, on-site laundry facilities, a community center, and quick access to local shopping.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ 1,478	\$ 2,000	\$ 1,700	\$ 2,000
Beginning Unrestricted Reserves	306,404	268,737	392,300	231,500	219,300
Total Beginning Reserves	306,404	270,215	394,300	233,200	221,300
Revenue	202,753	286,299	217,300	229,500	225,000
Expenses					
Personnel Services	70,919	50,758	76,500	74,700	80,200
Materials & Services	139,534	151,513	140,100	157,700	134,500
Overhead	-	-	-	-	-
Total Expenses	210,453	202,271	216,600	232,400	214,700
Net Change	(7,700)	84,028	700	(2,900)	10,300
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	(9,900)	(9,000)	(9,900)
Inter-Program Transfers In	679	-	-	-	-
Inter-Program Transfers Out	-	(121,002)	-	-	-
Other Resources Provided (Used)	679	(121,002)	(9,900)	(9,000)	(9,900)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(7,021)	(36,974)	(9,200)	(11,900)	400
Ending Restricted Reserves	-	1,719	2,000	2,000	2,000
Ending Unrestricted Reserves	299,383	231,522	383,100	219,300	219,700
Total Ending Reserves	\$ 299,383	\$ 233,241	\$ 385,100	\$ 221,300	\$ 221,700



# McKenzie Village

McKenzie Village is located in the city of Springfield, OR. McKenzie Village is truly a "village" in that it encompasses an entire neighborhood; it is comprised of eighty-six (86) duplexes that line both sides of the streets at North First St., Mill St., West Olympic St., Water St., Kelly Blvd., West Quinalt St., Prescott Ln., McPherson Pl., and West Fairview Dr. The community is comprised of fifty-two (52) one-bedroom units, ninety (90) two-bedroom units, and thirty (30) three-bedroom units serving a mixed population of seniors, disabled person(s), and families. Each unit includes appliances, blinds, washer & dryer hookups, a ductless heat pump, parking, and a private yard. McKenzie Village is conveniently located near shopping, schools, public transportation, restaurants, parks and the 1.3 mile By-Gully Bike/Jog Path.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ 8,010	\$ 8,000	\$ 8,000	\$ 8,000
Beginning Unrestricted Reserves	420,964	306,163	(39,800)	357,200	326,600
Total Beginning Reserves	420,964	314,173	(31,800)	365,200	334,600
Revenue	1,156,556	1,205,729	1,132,500	1,176,400	1,111,300
Expenses					
Personnel Services	435,343	357,853	381,900	354,300	373,200
Materials & Services	772,830	796,855	693,800	817,700	690,700
Overhead	-	-	-	-	-
Total Expenses	1,208,173	1,154,708	1,075,700	1,172,000	1,063,900
Net Change	(51,617)	51,021	56,800	4,400	47,400
Other Resources					
Capital Outlay	-	(349,497)	-	(349,000)	-
Reserves	-	-	-	-	-
Debt Issuance	-	349,497	-	349,000	-
Debt Service	-	-	(35,000)	(35,000)	(35,000)
Inter-Program Transfers In	340	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	340	-	(35,000)	(35,000)	(35,000)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(51,277)	51,021	21,800	(30,600)	12,400
Ending Restricted Reserves	-	8,010	8,000	8,000	8,000
Ending Unrestricted Reserves	369,687	357,184	(18,000)	326,600	339,000
Total Ending Reserves	\$ 369,687	\$ 365,194	\$ (10,000)	\$ 334,600	\$ 347,000

# Pengra Court

Pengra Court is comprised of seventeen (17) two-bedroom and five (5) three-bedroom townhouse style apartments, and is situated in a quiet neighborhood on R Street in Springfield, OR. The buildings are set back from the street and each townhouse has a covered front patio and small yard with privacy fencing. Each unit comes with appliances, blinds, washer & dryer hookups, and two (2) outdoor storage closets. Parking lots provide ample off-street parking for residents. The vaulted ceilings on the first floor and large living room windows allow natural light which provides a sense of spaciousness that is not often found in apartment living. Benches placed throughout common areas invite residents to pass the time together. Pengra Court is conveniently located near shopping, schools, public transportation, restaurants, and parks.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ 8,010	\$ 8,000	\$ 12,900	\$ 8,000
Beginning Unrestricted Reserves	35,234	21,778	200	700	77,900
Total Beginning Reserves	35,234	29,788	8,200	13,600	85,900
Revenue	150,390	130,585	143,000	215,400	213,500
Expenses					
Personnel Services	58,666	39,471	46,700	46,100	48,000
Materials & Services	117,145	107,349	90,900	89,000	137,200
Overhead	-	-	-	-	-
Total Expenses	175,811	146,820	137,600	135,100	185,200
Net Change	(25,421)	(16,235)	5,400	80,300	28,300
Other Resources					
Capital Outlay	-	(163,040)	-	(195,000)	-
Reserves	-	-	-	-	-
Debt Issuance	-	163,040	-	195,000	-
Debt Service	-	-	(11,900)	(8,000)	(11,900)
Inter-Program Transfers In	340	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	340	-	(11,900)	(8,000)	(11,900)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(25,081)	(16,235)	(6,500)	72,300	16,400
Ending Restricted Reserves	-	12,881	8,000	8,000	8,000
Ending Unrestricted Reserves	10,153	672	(6,300)	77,900	94,300
Total Ending Reserves	\$ 10,153	\$ 13,553	\$ 1,700	\$ 85,900	\$ 102,300

# Springfield Scattered Sites

There are twenty (20) units in the Springfield Scattered Sites, which includes a mix of single-family homes and duplexes. They range in size from two-bedroom to four-bedroom units. Each residence includes a private fenced yard, stove, refrigerator, and washer & dryer hookups. The Scattered Sites are expensive to manage and maintain due to their geographic distance and non-uniformity of floor plans. As a result, in FY18 we sold three (3) of these units through RAD to convert the federal assistance to another project. We plan to sell the remaining units in FY21.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ 8,009	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	171,395	88,000	171,395	204,700	-
Total Beginning Reserves	171,395	96,009	171,395	136,700	-
Revenue	68,562	212,476	68,562	83,400	25,800
Expenses					
Personnel Services	36,570	24,508	36,570	17,000	7,700
Materials & Services	53,132	79,291	53,132	59,000	18,100
Overhead	-	-	-	-	-
Total Expenses	89,702	103,799	89,702	21,200	25,800
Net Change	(21,140)	108,677	(21,140)	4,600	-
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	(141,300)	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(21,140)	108,677	(21,140)	(136,700)	-
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	150,255	204,686	150,255	-	-
Total Ending Reserves	\$ 150,255	\$ 204,686	\$ 150,255	\$ -	\$ -

**Note: Through the sale of the scattered site units as part of RAD,  
this budget will be removed in the FY 23 budget document.**



# Maplewood Meadows

Maplewood Meadows, located near Costco on Coburg Road in Eugene, OR offers thirty-eight (38) three and four-bedroom townhouses in a small complex away from traffic. Maplewood Meadows features yards, washer & dryer hookups, and on-site laundry facilities with close proximity to shopping and schools. Maplewood is a site for the Summer Lunch program for kids ages 2-18 and approximately 15 children participate each summer. In addition, they have a bi-monthly Extra Helpings Food Distribution Program, a community garden, a computer lab for residents, and a representative on the Resident Advisory Board. Residents have participated in Food for Lane County nutrition classes and are also active in setting up events for the holidays as well as craft days and movie nights for children in the summer.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ 23,210	\$ 23,100	\$ 23,700	\$ 23,100
Beginning Unrestricted Reserves	(746)	50,173	10,800	138,500	103,700
Total Beginning Reserves	(746)	73,383	33,900	162,200	126,800
Revenue	300,228	485,206	323,300	318,300	319,700
Expenses					
Personnel Services	130,608	111,101	119,600	94,000	130,600
Materials & Services	203,410	285,274	205,600	255,300	187,400
Overhead	-	-	-	-	-
Total Expenses	334,018	396,375	325,200	349,300	318,000
Net Change	(33,790)	88,831	(1,900)	(31,000)	1,700
Other Resources					
Capital Outlay	-	(285,368)	-	(342,000)	-
Reserves	-	-	-	-	-
Debt Issuance	-	285,368	-	337,600	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	679	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	679	-	-	(4,400)	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(33,111)	88,831	(1,900)	(35,400)	1,700
Ending Restricted Reserves	-	23,710	23,100	23,100	23,100
Ending Unrestricted Reserves	(33,857)	138,505	8,900	103,700	105,400
Total Ending Reserves	\$ (33,857)	\$ 162,214	\$ 32,000	\$ 126,800	\$ 128,500

# Eugene Scattered Sites

There are ninety-two (92) units in the Eugene Scattered Sites, which includes a mix of duplexes and single-family homes. The Scattered Sites are spread across several zip codes and range in size from two-bedroom to four-bedroom units. Each unit includes a private fenced yard, stove, refrigerator, and washer & dryer hookups. The units are expensive to manage and maintain due to their geographic distance and non-uniformity of floor plans. As a result, in FY18 we sold nine (9) of the units through RAD to convert the federal assistance to another project. The remaining units will be sold in FY21.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ 23,210	\$ 23,100	\$ 23,700	\$ -
Beginning Unrestricted Reserves	232,906	89,343	146,900	138,500	-
Total Beginning Reserves	232,906	112,553	170,000	162,200	-
Revenue	252,607	874,830	102,700	370,800	93,500
Expenses					
Personnel Services	104,203	106,287	21,500	69,900	21,500
Materials & Services	149,849	346,464	78,000	174,000	72,000
Overhead	-	-	-	-	-
Total Expenses	254,052	452,751	99,500	243,900	93,500
Net Change	(1,445)	422,079	3,200	126,900	-
Other Resources					
Capital Outlay	-	(372,418)	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	(13,400)	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	(289,100)	-
Other Resources Provided (Used)	-	(372,418)	(13,400)	(289,100)	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(1,445)	49,661	(10,200)	(162,200)	-
Ending Restricted Reserves	-	23,710	23,100	-	-
Ending Unrestricted Reserves	231,461	138,505	136,700	-	-
Total Ending Reserves	\$ 231,461	\$ 162,214	\$ 159,800	\$ -	\$ -

**Note: Through the sale of the scattered site units as part of RAD, this budget will be removed in the FY 23 budget document.**

# Parkview Terrace

Parkview Terrace is located in the heart of Eugene, OR and conveniently positioned within a close proximity to the downtown shopping district. Parkview is comprised of one hundred and fifty (150) units encompassing one and two-bedroom units on four (4) levels serving families including households with elderly or disabled person(s). The surrounding views are engaging and complimentary from every angle of the complex. Residents at Parkview Terrace enjoy two (2) private courtyards, a community room offering an extensive library coupled with computer access, games, a piano, and various social activities throughout the year, on-site laundry facilities on each level, two (2) centrally located elevators, and convenient parking on either side of the complex making life easy and fun for the residents. Parkview is situated just below Skinner Butte and adjacent to the Campbell Senior



Center, and is close to parks, bike and walking trails, shopping, churches, restaurants, and public transportation. Parkview Terrace is a large complex where residents connect and experience a small town sense of community.

	<b><u>2019</u></b> <b><u>BUDGET</u></b>	<b><u>2019</u></b> <b><u>ACTUAL</u></b>	<b><u>2020</u></b> <b><u>BUDGET</u></b>	<b><u>2020</u></b> <b><u>PROJECTED</u></b>	<b><u>2021</u></b> <b><u>BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ 3,657	\$ 3,700	\$ 4,800	\$ 4,800
Beginning Unrestricted Reserves	629,171	578,569	671,800	(30,800)	(168,900)
Total Beginning Reserves	629,171	582,226	675,500	(26,000)	(164,100)
Revenue	833,881	955,724	815,100	950,000	915,300
Expenses					
Personnel Services	303,502	246,700	314,600	260,500	332,700
Materials & Services	569,567	496,481	511,400	531,300	571,100
Overhead	-	-	-	-	-
Total Expenses	873,069	743,181	826,000	791,800	903,800
Net Change	(39,188)	212,543	(10,900)	158,200	11,500
Other Resources					
Capital Outlay	-	(717,048)	-	(308,000)	-
Reserves	-	-	-	308,000	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	(296,300)	-
Inter-Program Transfers In	679	-	-	-	-
Inter-Program Transfers Out	-	(103,674)	-	-	-
Other Resources Provided (Used)	679	(820,722)	-	(296,300)	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(38,509)	(608,179)	(10,900)	(138,100)	11,500
Ending Restricted Reserves	-	4,846	3,700	4,800	4,800
Ending Unrestricted Reserves	590,662	(30,799)	660,900	(168,900)	(157,400)
Total Ending Reserves	\$ 590,662	\$ (25,953)	\$ 664,600	\$ (164,100)	\$ (152,600)



# Veneta Villa

Veneta Villa is located in the unique town of Veneta, OR. Known for its charm and cottage-like setting, Veneta Villa is a one-level apartment community comprised of thirty (30) one-bedroom units serving families including households with elderly or disabled person(s). The residents of Veneta Villa enjoy a garden-style environment, easily accessible parking, an on-site laundry facility, a private walking loop, and picnic tables. Veneta Villa is conveniently located for small-town shopping, churches, schools, services, restaurants, parks, and public transportation as well as nearby camping areas and lakes. The city of Veneta is on the main highway to Oregon's Pacific coast. Additionally, Veneta is only seven miles from Eugene and is well known as being the home to Oregon's Country Fair.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2019 BUDGET</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ 571	\$ -	\$ 800	\$ 500
Beginning Unrestricted Reserves	23,627	(19,087)	23,627	(44,400)	(76,200)
Total Beginning Reserves	23,627	(18,516)	23,627	(78,300)	(75,700)
Revenue	166,971	185,882	166,971	253,100	238,600
Expenses					
Personnel Services	74,020	72,158	74,020	75,000	66,000
Materials & Services	161,704	138,834	161,704	175,300	149,800
Overhead	-	-	-	-	-
Total Expenses	235,724	210,992	235,724	250,300	215,800
Net Change	(68,753)	(25,110)	(68,753)	2,800	22,800
Other Resources					
Capital Outlay	-	(3,382)	-	-	-
Reserves	-	-	-	22,300	-
Debt Issuance	-	3,382	-	-	-
Debt Service	-	-	-	(22,500)	(22,500)
Inter-Program Transfers In	227	-	227	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	227	-	227	(200)	(22,500)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(68,526)	(25,110)	(68,526)	2,600	300
Ending Restricted Reserves	-	814	-	500	500
Ending Unrestricted Reserves	(44,899)	(44,440)	(44,899)	(76,200)	(75,900)
Total Ending Reserves	\$ (44,899)	\$ (43,626)	\$ (44,899)	\$ (75,700)	\$ (75,400)

# Lindeborg Place



Lindeborg Place is centrally located in historic Junction City, OR. Lindeborg Place is a two-story apartment complex comprised of forty (40) one-bedroom units serving families including households with elderly or disabled person(s). The residents of Lindeborg Place enjoy our beautifully maintained grounds, rose gardens, a recently remodeled community room, dual on-site laundry facilities, an elevator for ease of access, public transportation, a private exterior courtyard, and convenient parking. Located near the heart of downtown Junction City, Lindeborg Place is within close proximity to small-town shopping, churches, schools, services, restaurants, and parks as well as the Police and Fire Departments. Junction City is only a few miles north of Eugene and is well known for its antique

car shows and the renowned annual Scandinavian Festival. Lindeborg Place is a large complex in Junction City where residents experience a small town sense of community.

	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ 571	\$ 600	\$ 800	\$ 600
Beginning Unrestricted Reserves	130,753	77,743	32,500	64,500	95,100
Total Beginning Reserves	130,753	78,314	33,100	65,300	95,700
Revenue	217,561	221,376	235,000	309,600	292,000
Expenses					
Personnel Services	88,053	98,641	92,500	95,400	101,900
Materials & Services	143,391	135,713	148,300	170,100	165,700
Overhead	-	-	-	-	-
Total Expenses	231,444	234,354	240,800	265,500	267,600
Net Change	(13,883)	(12,978)	(5,800)	44,100	24,400
Other Resources					
Capital Outlay	-	(135,304)	-	(2,500)	-
Reserves	-	-	-	-	-
Debt Issuance	-	135,304	-	-	-
Debt Service	-	-	(10,700)	(11,200)	(10,700)
Inter-Program Transfers In	227	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	227	-	(10,700)	(13,700)	(10,700)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(13,656)	(12,978)	(16,500)	30,400	13,700
Ending Restricted Reserves	-	814	600	600	600
Ending Unrestricted Reserves	117,097	64,522	16,000	95,100	108,800
Total Ending Reserves	\$ 117,097	\$ 65,336	\$ 16,600	\$ 95,700	\$ 109,400



# Veneta Scattered Sites

The Veneta Scattered Sites are located in the unique town of Veneta, OR. Our Veneta Scattered Sites encompass twenty (20) two, three and four-bedroom duplexes serving families including households with elderly or disabled person(s). Residents in the Veneta Scattered Sites enjoy their own private yards, storage areas, and individual laundry rooms. Each location is within close proximity to small-town shopping, churches, schools, services, restaurants, parks, and public transportation, as well as nearby camping areas and lakes. The city of Veneta is on the main highway to Oregon's Pacific coast. Additionally, Veneta is only seven miles from Eugene and is well known as being the home to Oregon's Country Fair. Residents experience a warm and friendly environment at the Veneta Scattered Sites.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 BUDGET</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ 571	\$ 600	\$ 800	\$ 600
Beginning Unrestricted Reserves	84,478	60,666	82,200	75,700	94,300
Total Beginning Reserves	84,478	61,237	82,800	76,500	94,900
Revenue	145,589	130,632	133,000	156,200	151,600
Expenses					
Personnel Services	56,043	45,856	50,500	56,000	59,300
Materials & Services	78,523	69,500	78,600	81,800	84,500
Overhead	-	-	-	-	-
Total Expenses	134,566	115,356	129,100	137,800	143,800
Net Change	11,023	15,276	3,900	18,400	7,800
Other Resources					
Capital Outlay	-	(3,382)	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	3,382	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	227	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	227	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	11,250	15,276	3,900	18,400	7,800
Ending Restricted Reserves	-	814	600	600	600
Ending Unrestricted Reserves	95,728	75,699	86,100	94,300	102,100
Total Ending Reserves	\$ 95,728	\$ 76,513	\$ 86,700	\$ 94,900	\$ 102,700

# Cresview Villa

Cresview Villa is nestled in a quaint neighborhood in Creswell, OR and is a thirty-four (34) unit complex serving families including households with elderly or disabled person(s). Each one-bedroom unit provides energy efficient gas heat, LED light fixtures, water-saving plumbing fixtures, and updated windows that keep energy bills affordable. Each unit also comes with a covered patio for residents to enjoy the four seasons. Cresview Villa is located a short drive from Eugene, is on the bus line, and is within walking distance to many downtown amenities. The beautiful gardens are a treasure and many residents garden in their small front areas to enhance the natural beauty of this special setting. Cresview Villa is a smoke-free complex with an active resident community. Each week on Tuesdays and Thursdays, the Meals on Wheels Program provides nutritious meals for participating residents and neighbors. The community room hosts a free lending library and is used to host special events and meetings throughout the year. The resident group raises funds through their sale table for special events like the annual BBQ as well as purchasing flowers each spring. The complex boasts three (3) ADA accessible units to accommodate those with physical disabilities, and provides onsite coin-op laundry facilities.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ 300	\$ 300	\$ 700	\$ 300
Beginning Unrestricted Reserves	102,736	(7,337)	(22,500)	33,500	55,700
Total Beginning Reserves	102,736	(7,037)	(22,200)	34,200	56,000
Revenue	255,231	191,693	236,100	250,000	216,200
Expenses					
Personnel Services	71,141	72,292	80,400	94,000	78,100
Materials & Services	157,500	139,386	157,700	140,500	126,000
Overhead	-	-	-	-	-
Total Expenses	228,641	211,678	238,100	234,500	204,100
Net Change	26,590	(19,985)	(2,000)	15,500	12,100
Other Resources					
Capital Outlay	-	(13,701)	-	(7,300)	-
Reserves	-	-	-	-	1,700
Debt Issuance	-	13,701	-	-	-
Debt Service	-	-	(13,900)	(13,800)	(13,800)
Inter-Program Transfers In	340	61,222	-	27,400	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	340	61,222	(13,900)	6,300	(12,100)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	26,930	41,237	(15,900)	21,800	-
Ending Restricted Reserves	-	720	300	300	300
Ending Unrestricted Reserves	129,666	33,480	(38,400)	55,700	55,700
Total Ending Reserves	\$ 129,666	\$ 34,200	\$ (38,100)	\$ 56,000	\$ 56,000

# Riverview Terrace



Riverview Terrace is a six-story building offering sixty (60) one-bedroom units serving families including households with elderly or disabled person(s). Riverview Terrace is located next to Row River in the charming small town of Cottage Grove, OR and is within walking distance to downtown, the local market, and transportation. Each unit provides ductless heat pumps for energy efficient heating and cooling, LED lighting, and water saving plumbing fixtures to keep energy bills affordable. In addition to the beautifully landscaped grounds, there are two (2) lots for resident parking. Riverview Terrace is a smoke-free building that provides a smoking area for residents and their guests. The large community room offers Meals on Wheels Program every Tuesday, Wednesday and Thursday, a book and video library, a pool table, and resident meeting space. The active resident group hosts many special events throughout the year. There are two (2) elevators to transport residents safely to their unit, and laundry facilities located on each of the five (5) residential floors. Bus transportation is located just outside the complex. Within the past year, the building has been sealed, painted, and received a new roof.

	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ 365	\$ 300	\$ 700	\$ 300
Beginning Unrestricted Reserves	294,621	136,721	140,300	57,600	70,000
Total Beginning Reserves	294,621	137,086	140,600	58,300	70,300
Revenue	375,889	286,912	343,600	360,700	353,700
Expenses					
Personnel Services	131,115	104,437	167,500	119,700	147,600
Materials & Services	310,828	261,203	270,900	219,900	197,800
Overhead	-	-	-	-	-
Total Expenses	441,943	365,640	438,400	339,600	345,400
Net Change	(66,054)	(78,728)	(94,800)	21,100	8,300
Other Resources					
Capital Outlay	-	(2,777)	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	2,777	-	-	-
Debt Service	-	-	(9,200)	(9,100)	(9,200)
Inter-Program Transfers In	340	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	340	-	(9,200)	(9,100)	(9,200)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(65,714)	(78,728)	(104,000)	12,000	(900)
Ending Restricted Reserves	-	720	300	300	300
Ending Unrestricted Reserves	228,907	57,638	36,300	70,000	69,100
Total Ending Reserves	\$ 228,907	\$ 58,358	\$ 36,600	\$ 70,300	\$ 69,400



# Abbie Lane Courts

Abbie Lane Courts is tucked away behind Willakenzie Elementary School off Willagellespie Road in Eugene, OR. It's just a short walk away is Valley River Shopping Mall, restaurants, and good freeway access. This smoke-free property offers twenty-five (25) one and two-story subsidized and affordable housing units. Each unit has been updated with a DHP and air conditioning unit, and offers energy efficient appliances. The property offers a large laundry room as well as washer & dryer hookups inside each unit.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ 100,000	\$ 134,273	\$ 100,000	\$ 40,000	\$ 60,000
Beginning Unrestricted Reserves	50,245	(66,241)	65,200	71,600	175,600
Total Beginning Reserves	150,245	68,032	165,200	111,600	235,600
Revenue	308,989	302,566	298,100	326,800	360,600
Expenses					
Personnel Services	49,452	74,000	68,200	41,900	57,700
Materials & Services	242,937	168,686	196,400	126,000	151,300
Overhead	-	-	-	-	-
Total Expenses	292,389	242,686	264,600	167,900	209,000
Net Change	16,600	59,880	33,500	158,900	151,600
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	(18,300)	(18,300)	(18,300)
Debt Issuance	-	-	-	-	-
Debt Service	(16,600)	(16,362)	(17,000)	(16,600)	(17,000)
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	(16,600)	(16,362)	(35,300)	(34,900)	(35,300)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	43,518	(1,800)	124,000	116,300
Ending Restricted Reserves	100,000	39,954	100,000	60,000	80,000
Ending Unrestricted Reserves	50,245	71,596	63,400	175,600	271,900
Total Ending Reserves	\$ 150,245	\$ 111,550	\$ 163,400	\$ 235,600	\$ 351,900

# Fourteen Pines

Fourteen Pines, located on Willakenzie near Coburg Road in Eugene, OR offers sixty-five (65) one, two, and three-bedroom apartments in a sprawling park-like setting, with sixty-two (62) project-based subsidies and three (3) market rate units. Conveniently located near bus lines, schools, the Sheldon Library Annex, and shopping, Fourteen Pines offers on-site coin-op laundry facilities and a large playground. Resident Services hosts a popular reading program for the children, and a Little Library was installed to provide plenty of books for the residents.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ 159,000	\$ 159,060	\$ 159,000	\$ 358,900	\$ 358,894
Beginning Unrestricted Reserves	201,067	168,970	142,600	(16,800)	44,806
Total Beginning Reserves	360,067	328,030	301,600	342,100	403,700
Revenue	518,019	507,196	503,500	517,900	484,000
Expenses					
Personnel Services	179,023	197,533	188,400	214,700	234,200
Materials & Services	254,000	243,180	218,700	185,900	186,200
Overhead	-	-	-	-	-
Total Expenses	433,023	440,713	407,100	400,600	420,400
Net Change	84,996	66,483	96,400	117,300	63,600
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	(84,996)	(52,396)	(100,800)	57,500	(100,800)
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	(113,200)	-
Other Resources Provided (Used)	(84,996)	(52,396)	(100,800)	(55,700)	(100,800)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	14,087	(4,400)	61,600	(37,200)
Ending Restricted Reserves	159,000	358,909	159,000	358,894	159,000
Ending Unrestricted Reserves	201,067	(16,792)	138,200	44,806	207,500
Total Ending Reserves	\$ 360,067	\$ 342,117	\$ 297,200	\$ 403,700	\$ 366,500

# Village Oaks

Consisting of one and two-story one, two and three-bedroom units, Village Oaks Apartments provides sixty-seven (67) units serving families including households with elderly or disabled person(s). Village Oaks has twenty-one (21) project-based rent subsidies for qualified residents and forty-six (46) market rent units. This beautifully treed and landscaped property is located within walking distance to McCornack Elementary School, Churchill High School, and local stores; with a bus stop located near the entrance. Units offer ductless heat pumps for energy efficient heating and cooling, and the site boasts four (4) coin-op laundry rooms, a spacious community room, two (2) playgrounds, and a basketball hoop. All units are smoke-free, with two (2) designated smoking areas provided for residents and their guests. Volunteer residents run the weekly Helping Hands Food Program through Food for Lane County.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ 186,000	\$ 194,973	\$ 186,000	\$ 308,200	\$ 378,200
Beginning Unrestricted Reserves	46,628	33,555	(38,600)	(258,200)	(363,900)
Total Beginning Reserves	<u>232,628</u>	<u>228,528</u>	<u>147,400</u>	<u>50,000</u>	<u>14,300</u>
Revenue	446,225	437,158	482,500	442,700	463,600
Expenses					
Personnel Services	140,752	223,915	161,100	228,400	192,000
Materials & Services	235,314	317,668	229,500	180,000	213,300
Overhead	-	-	-	-	-
Total Expenses	<u>376,066</u>	<u>541,583</u>	<u>390,600</u>	<u>408,400</u>	<u>405,300</u>
Net Change	<u>70,159</u>	<u>(104,425)</u>	<u>91,900</u>	<u>34,300</u>	<u>58,300</u>
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	(70,159)	(74,137)	(96,200)	(70,000)	(96,200)
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	<u>(70,159)</u>	<u>(74,137)</u>	<u>(96,200)</u>	<u>(70,000)</u>	<u>(96,200)</u>
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	<u>-</u>	<u>(178,562)</u>	<u>(4,300)</u>	<u>(35,700)</u>	<u>(37,900)</u>
Ending Restricted Reserves	190,000	308,179	186,000	378,200	474,400
Ending Unrestricted Reserves	42,628	(258,213)	(42,900)	(363,900)	(498,000)
Total Ending Reserves	<u>\$ 232,628</u>	<u>\$ 49,966</u>	<u>\$ 143,100</u>	<u>\$ 14,300</u>	<u>\$ (23,600)</u>



# Firwood Apartments

The Firwood Apartments are conveniently located only one block from West 11th Avenue in Eugene, Oregon. Firwood is comprised of nine (9) two-level buildings with a total of seventy (70) one-bedroom and twenty (20) two-bedroom units, serving families including households with elderly or disabled person(s). Residents at Firwood enjoy private patios, three (3) on-site laundry rooms, garden areas, new exterior stairways, a shared central community grass courtyard, convenient parking and a single drive-in access for privacy and safety. Firwood is situated near bike and walk trails, shopping, churches, schools, services, restaurants, parks and public transportation. Firwood Apartments is a bond-funded property situated on privately-owned land leased by Homes for Good. This complex does not



require HUD REAC inspections, however, performance measures are the same as HUD REAC inspected properties. Performance measures of Homes for Good properties are subject to local and federal regulations and include but are not limited to curb appeal, maintenance repairs, work order response times and overall condition.

	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ 8,600	\$ 320,070	\$ 8,600	\$ 8,600	\$ 8,600
Beginning Unrestricted Reserves	388,572	(11,398)	189,700	(1,900)	41,500
Total Beginning Reserves	397,172	308,672	198,300	6,700	50,100
Revenue	636,500	620,800	627,800	620,000	627,800
Expenses					
Personnel Services	156,070	138,873	179,300	150,700	179,300
Materials & Services	365,778	309,146	364,800	285,900	364,800
Overhead	-	-	-	-	-
Total Expenses	521,848	448,019	544,100	436,600	544,100
Net Change	114,652	172,781	83,700	183,400	83,700
Other Resources					
Capital Outlay	(94,000)	-	(81,600)	(50,000)	(81,600)
Reserves		(226,510)	34,200	-	34,200
Debt Issuance	-	-	-	-	-
Debt Service	(20,652)	(40,184)	(42,400)	(40,000)	(42,400)
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	(208,019)	-	(50,000)	-
Other Resources Provided (Used)	(114,652)	(474,713)	(89,800)	(140,000)	(89,800)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	(301,932)	(6,100)	43,400	(6,100)
Ending Restricted Reserves	-	8,649	8,600	8,600	8,600
Ending Unrestricted Reserves	397,172	(1,909)	183,600	41,500	35,400
Total Ending Reserves	\$ 397,172	\$ 6,740	\$ 192,200	\$ 50,100	\$ 44,000

# Capital Projects Fund

The Capital Projects Fund provides, on an annual basis, funds to Public Housing for development, financing, and modernization of the Agency's housing portfolio. The Capital Projects Team has developed the 5-Year Action Plan that describes the necessary capital improvements to ensure long-term physical and social viability of our Public Housing developments, which includes redesign, reconstruction, and reconfiguration of Public Housing sites and buildings (including accessibility improvements) and development of mixed-finance projects; vacancy reduction; addressing deferred maintenance needs and the replacement of obsolete utility systems and dwelling equipment; planned code compliance, management improvement, and capital expenditures to improve safety and security of residents.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ (197,800)	\$ (197,800)
Beginning Unrestricted Reserves	-	-	-	-	-
Total Beginning Reserves	-	-	-	(197,800)	(197,800)
Revenue	1,206,300	1,422,851	1,281,235	970,000	1,422,000
Expenses					
Personnel Services	78,000	224,598	77,776	78,000	224,600
Materials & Services	12,800	16,894	12,893	14,000	16,900
Overhead	-	-	-	-	-
Total Expenses	90,800	241,492	90,669	92,000	241,500
Net Change	1,115,500	1,181,359	1,190,566	878,000	1,180,500
Other Resources					
Capital Outlay	(1,115,500)	(1,379,122)	(1,115,566)	(878,000)	(900,000)
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	(1,115,500)	(1,379,122)	(1,115,566)	(878,000)	(900,000)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	(197,763)	75,000	-	280,500
Ending Restricted Reserves	-	(197,763)	75,000	(197,800)	82,700
Ending Unrestricted Reserves	-	-	-	-	-
Total Ending Reserves	\$ -	\$ (197,763)	\$ 75,000	\$ (197,800)	\$ 82,700



# Norsemen Village

Norsemen Village offers forty-four (44) units of affordable housing serving families including households with elderly or disabled person(s) in Junction City, OR. The complex surrounds a lovely garden setting with a beautiful new community room that includes a gas fireplace, outside gathering area, and laundry room. Norsemen is walking distance from old downtown Junction City with proximity to cafes and shops, City Hall, the Viking Sal Senior Center and other services and was completely renovated in 2013. There is professional onsite management and maintenance who attend to the development's upkeep.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ 324,496	\$ 324,437	\$ 324,500	\$ 376,000	\$ 324,500
Beginning Unrestricted Reserves	18,295	42,651	71,100	14,300	103,700
Total Beginning Reserves	342,791	367,088	395,600	390,300	428,200
Revenue	281,334	267,459	280,300	284,200	288,600
Expenses					
Personnel Services	-	-	-	-	-
Materials & Services	205,824	218,283	200,000	220,300	200,000
Overhead	-	-	-	-	-
Total Expenses	205,824	218,283	200,000	220,300	200,000
Net Change	75,510	49,176	80,300	63,900	88,600
Other Resources					
Capital Outlay	(8,000)	-	(27,500)	-	(27,500)
Reserves	(40,966)	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	(26,544)	(25,883)	(13,700)	(26,000)	(13,700)
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	(75,510)	(25,883)	(41,200)	(26,000)	(41,200)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	23,293	39,100	37,900	47,400
Ending Restricted Reserves	364,732	376,044	324,500	324,500	324,500
Ending Unrestricted Reserves	(21,941)	14,337	110,200	103,700	151,100
Total Ending Reserves	\$ 342,791	\$ 390,381	\$ 434,700	\$ 428,200	\$ 475,600

# Camas Apartments

Camas Apartments (420 South 2nd Street) are located on the corner of F and 2nd Streets in Creswell Oregon, in the southern edge of the Willamette Valley. This family friendly complex of thirty-six (36) units has mostly duplex-style two-bedroom townhouses along with a few single bedroom one-level apartments. Schools, shopping, restaurants and the city library are within a few blocks. The LTD bus system serves the area for public transportation. There are two (2) on-site laundry areas, a playground, and a community room with a kitchenette and a computer area.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ 85,360	69,174	\$ 70,000	\$ 79,512	\$ 70,000
Beginning Unrestricted Reserves	(58,957)	(21,977)	(22,800)	(40,337)	(64,725)
Total Beginning Reserves	26,403	47,197	47,200	39,175	5,275
Revenue	235,923	235,343	255,700	248,600	259,500
Expenses					
Personnel Services	-	-	-	-	-
Materials & Services	200,542	245,101	222,900	257,300	237,400
Overhead	-	-	-	-	-
Total Expenses	200,542	245,101	222,900	257,300	237,400
Net Change	35,381	(9,758)	32,800	(8,700)	22,100
Other Resources					
Capital Outlay	(13,675)	-	-	-	(27,600)
Reserves	(8,707)	15,909	-	(8,300)	27,600
Debt Issuance	-	-	-	-	-
Debt Service	(12,999)	(14,173)	(7,400)	(16,900)	(7,400)
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	(35,381)	1,736	(7,400)	(25,200)	(7,400)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	(8,022)	25,400	(33,900)	14,700
Ending Restricted Reserves	93,421	79,512	70,000	70,000	70,000
Ending Unrestricted Reserves	(67,018)	(40,337)	2,600	(64,725)	(50,025)
Total Ending Reserves	\$ 26,403	\$ 39,175	\$ 72,600	\$ 5,275	\$ 19,975

# Jacob's Lane

Jacobs Lane Apartments has sixty-three (63) units and is a community-oriented development in the Bethel area of Northwest Eugene. It offers a nice mix of one, two, and three-bedroom single level and townhouse style units for a diverse community of families, seniors, and individuals. Many of the apartments have exterior storage units, patios, washer & dryer hookups, dishwashers, and there is an on-site laundry room. Residents enjoy use of a community center with a meeting room, a library sharing area, and a computer room. Meals on Wheels has an onsite location for residents to use their program. There is also a community garden with orchard trees and large outdoor areas for children to play. The complex is close to parks, schools, and has access to the LTD bus line. Additionally, the area has a varied mix of local businesses providing employment opportunities and services to residents and families.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ 241,921	\$ 249,245	\$ 250,000	\$ 237,000	\$ 250,000
Beginning Unrestricted Reserves	(14,554)	43,573	(17,500)	200	11,500
Total Beginning Reserves	<u>227,367</u>	<u>292,818</u>	<u>232,500</u>	<u>237,200</u>	<u>261,500</u>
Revenue	411,942	322,268	342,400	336,400	355,500
Expenses					
Personnel Services	-	-	-	-	-
Materials & Services	282,522	375,990	309,200	279,200	351,000
Overhead	-	-	-	-	-
Total Expenses	<u>282,522</u>	<u>375,990</u>	<u>309,200</u>	<u>279,200</u>	<u>351,000</u>
Net Change	<u>129,420</u>	<u>(53,722)</u>	<u>33,200</u>	<u>57,200</u>	<u>4,500</u>
Other Resources					
Capital Outlay	-	-	-	(13,500)	-
Reserves	(13,206)	24,529	(15,400)	13,500	-
Debt Issuance	-	-	-	-	-
Debt Service	(56,814)	(26,469)	(27,900)	(32,900)	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	<u>(70,020)</u>	<u>(1,940)</u>	<u>(43,300)</u>	<u>(32,900)</u>	<u>-</u>
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	<u>59,400</u>	<u>(55,662)</u>	<u>(10,100)</u>	<u>24,300</u>	<u>4,500</u>
Ending Restricted Reserves	228,716	237,003	250,000	250,000	250,000
Ending Unrestricted Reserves	58,051	153	(27,600)	11,500	16,000
Total Ending Reserves	<u>\$ 286,767</u>	<u>\$ 237,156</u>	<u>\$ 222,400</u>	<u>\$ 261,500</u>	<u>\$ 266,000</u>



# Laurel Gardens

Laurel Gardens Apartments is comprised of forty-one (41) units are located in west Eugene along 12th Avenue between Grant and Chambers Streets at 1775 West 12th Avenue. The neighborhood is a diverse mix of houses, apartments, commercial and retail shops, restaurants, offices, clinics and service providers within walking distance. Most apartments are single-level and have one bedroom. Some of the units share a common living room and kitchen between two residents. A community building with a kitchenette and restrooms in addition to a laundry room serve the complex as well.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ 137,283	\$ 138,177	\$ 140,000	\$ 140,000	\$ 140,000
Beginning Unrestricted Reserves	23,809	17,300	3,300	12,100	(100)
Total Beginning Reserves	161,092	155,477	143,300	152,100	139,900
Revenue	184,012	183,381	135,400	195,800	214,000
Expenses					
Personnel Services	-	-	-	-	-
Materials & Services	177,512	167,410	115,200	189,700	165,900
Overhead	-	-	-	-	-
Total Expenses	177,512	167,410	115,200	189,700	165,900
Net Change	6,500	15,971	20,200	6,100	48,100
Other Resources					
Capital Outlay	(50,000)	-	-	-	(21,000)
Reserves	50,000	-	-	(100)	-
Debt Issuance	-	-	-	-	-
Debt Service	(17,000)	(19,362)	(20,200)	(18,200)	(16,400)
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	(17,000)	(19,362)	(20,200)	(18,300)	(37,400)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(10,500)	(3,391)	-	(12,200)	10,700
Ending Restricted Reserves	137,283	140,001	140,000	140,000	140,000
Ending Unrestricted Reserves	13,309	12,085	3,300	(100)	10,600
Total Ending Reserves	\$ 150,592	\$ 152,086	\$ 143,300	\$ 139,900	\$ 150,600

# Walnut Park

Walnut Park at 925 Hatton Avenue is located in the River Road area of Eugene off North Park and Hatton Avenue. This friendly thirty-two (32) unit community has two- and three- bedroom townhouse style duplexes. Each unit has its own washer/dryer hook-up and storage shed. The community center has room for gatherings and is complete with a kitchenette and restroom. On-site management is shared with neighboring Turtle Creek Apartments. Emerald Park and other neighborhood parks are within walking distance as well as several schools and the LTD bus line. The River Road area has several shopping centers with restaurants, grocery stores, office buildings and medical services providing lots of opportunities. The nearby Turtle Creek Refuge Area offers wildlife observation and walking paths with park benches.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ 82,708	\$ 44,700	\$ 83,000	\$ 96,900	\$ 83,000
Beginning Unrestricted Reserves	(54,010)	(91,569)	(19,600)	88,100	100,800
Total Beginning Reserves	28,698	(46,869)	63,400	185,000	183,800
Revenue	251,582	203,159	204,800	197,800	180,000
Expenses					
Personnel Services	-	-	-	-	-
Materials & Services	222,081	186,932	173,100	199,000	180,000
Overhead	-	-	-	-	-
Total Expenses	222,081	186,932	173,100	199,000	180,000
Net Change	29,501	16,227	31,700	(1,200)	-
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	7,985	231,904	(4,600)	8,300	8,000
Debt Issuance	-	-	-	-	-
Debt Service	(26,886)	(8,326)	(30,600)	(8,300)	(8,000)
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	(18,901)	223,578	(35,200)	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	10,600	239,805	(3,500)	(1,200)	-
Ending Restricted Reserves	74,704	96,942	83,000	83,000	83,000
Ending Unrestricted Reserves	(35,406)	88,093	(23,100)	100,800	100,800
Total Ending Reserves	\$ 39,298	\$ 185,035	\$ 59,900	\$ 183,800	\$ 183,800

# The Orchards

## Wilakenzie Townhouses

The Orchards (Willakenzie Townhouses) is a garden court complex located at 3202 Willakenzie Road in Eugene, OR. This family-friendly community has natural landscaping with play areas scattered throughout duplex style buildings and a generous community center with a kitchen and restrooms. In this twenty-five (25) unit community, there is a mixture of two and three-bedroom two-story townhouses as well as single level handicap accessible units, all with washer & dryer hookups. The complex is located in the desirable Ferry Street Bridge area of North Eugene close to bus lines, schools, shopping at Valley River Center, and walking paths at the Delta Ponds.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2020 BUDGET</u></b>
Beginning Restricted Reserves	\$ 45,745	\$ 44,692	\$ 45,700	\$ 50,500	\$ 45,700
Beginning Unrestricted Reserves	(44,812)	(91,569)	(19,100)	(114,900)	(121,800)
Total Beginning Reserves	933	(46,877)	26,600	(64,400)	(76,100)
Revenue	241,431	185,061	187,400	259,200	201,900
Expenses					
Personnel Services	-	-	-	-	-
Materials & Services	185,806	194,291	168,200	270,900	191,300
Overhead	-	-	-	-	-
Total Expenses	185,806	194,291	168,200	270,900	191,300
Net Change	55,625	(9,230)	19,200	(11,700)	10,600
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	3,419	(7,865)	(40,600)	-	-
Debt Issuance	-	-	-	-	-
Debt Service	(7,044)	(8,326)	(10,000)	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	(3,625)	(16,191)	(50,600)	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	52,000	(25,421)	(31,400)	(11,700)	10,600
Ending Restricted Reserves	42,349	50,482	45,700	45,700	45,700
Ending Unrestricted Reserves	10,584	(114,878)	(50,500)	(121,800)	(111,200)
Total Ending Reserves	\$ 52,933	\$ (64,396)	\$ (4,800)	\$ (76,100)	\$ (65,500)



# Sheldon Village Apartments LLC



Sheldon Village Apartments, at 2475 Sheldon Village Loop in Eugene, consists of seventy-eight (78) units (one-bedroom apartments, two-bedroom flat apartments, two-bedroom townhouse apartments, and three-bedroom townhouse apartments), located in professionally landscaped courtyards, in the Sheldon High School area. Amenities include, designer cabinetry, decks and balconies, energy efficient construction, creative floor plans, ample storage, a

clubhouse with a lending library and computer center, as well as professional on-site management. Sheldon Village is located close to LTD bus lines and within walking distance of schools, shopping, restaurants, entertainment, and medical/professional services.

	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ 478,700	\$ 9,876	\$ 9,900	\$ 2,600	\$ 9,900
Beginning Unrestricted Reserves	125,265	(164,888)	(164,900)	(213,000)	73,000
Total Beginning Reserves	603,965	(155,012)	(155,000)	(210,400)	82,900
Revenue	625,487	564,200	562,500	835,900	620,700
Expenses					
Personnel Services	-	-	-	-	-
Materials & Services	357,812	380,523	510,000	542,600	608,500
Overhead	-	-	-	-	-
Total Expenses	357,812	380,523	510,000	542,600	608,500
Net Change	267,675	183,677	52,500	293,300	12,200
Other Resources					
Capital Outlay	(3,840,000)	(239,109)	-	-	-
Reserves	(27,300)	-	-	-	-
Debt Issuance	3,840,000	-	-	-	-
Debt Service	(240,375)	-	(60,000)	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	(267,675)	(239,109)	(60,000)	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	-	(55,432)	(7,500)	293,300	12,200
Ending Restricted Reserves	500,000	2,562	9,900	9,900	9,900
Ending Unrestricted Reserves	103,965	(213,006)	(172,400)	73,000	85,200
Total Ending Reserves	\$ 603,965	\$ (210,444)	\$ (162,500)	\$ 82,900	\$ 95,100

# COCC

## Central Office Cost Center

The Central Office Cost Center (COCC) consists of those activities of Homes for Good that are funded through fees including management fees, bookkeeping fees, asset management fees, maintenance fee for service charges, occupancy fees, and certain miscellaneous non-federal grants. Examples of costs within the COCC include the Executive Director, Human Resources, Information Technology, Finance, Capital Fund Administration, Maintenance Fee for Service, building costs, board activities, and other management staff.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	2,992,000	-	8,000,000	6,187,300	\$ -
Beginning Unrestricted Reserves	(731,860)	(486,129)	(429,400)	1,862,900	1,994,300
Total Beginning Reserves	2,260,140	(486,129)	7,570,600	8,050,200	1,994,300
Revenue	3,044,558	3,178,678	3,393,000	3,015,400	3,672,600
Expenses					
Personnel Services	2,365,093	2,181,900	2,230,500	2,102,500	2,357,100
Materials & Services	957,967	995,987	1,156,900	731,200	821,000
Overhead	3,242	-	-	-	-
Total Expenses	3,326,302	3,177,887	3,387,400	2,833,700	3,178,100
Net Change	(281,744)	791	5,600	181,700	494,500
Other Resources					
Capital Outlay	(50,000)	(1,166,356)	(9,050,000)	(4,789,000)	-
Reserves	-	-	(40,000)	-	(40,000)
Debt Issuance	44,608	9,203,000	1,000,000	-	-
Debt Service	-	(3,784,967)	(309,100)	(675,000)	(675,000)
Inter-Program Transfers In	879,046	4,283,705	593,500	-	326,900
Inter-Program Transfers Out	(631,746)	-	-	(727,000)	-
Other Resources Provided (Used)	241,908	8,535,382	(7,805,600)	(6,191,000)	(388,100)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(39,836)	8,536,173	(7,800,000)	(6,009,300)	106,400
Ending Restricted Reserves	3,036,608	6,187,333	-	-	-
Ending Unrestricted Reserves	(816,305)	1,862,711	(229,400)	1,994,300	2,100,700
Total Ending Reserves	\$ 2,220,303	\$ 8,050,044	\$ (229,400)	\$ 1,994,300	\$ 2,100,700

**Note: The budgets for Fleet and 100W. 13th Ave have been combined with COCC departments.**



# Agency General

Agency General where Homes for Good gathers COCC revenues and tracks other financing resources not specified elsewhere within the COCC.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ 2,992,000	\$ -	\$ -	\$ 994,300	\$ -
Beginning Unrestricted Reserves	(673,000)	(486,129)	3,080,600	4,003,900	6,041,600
Total Beginning Reserves	2,319,000	(486,129)	3,080,600	4,998,200	6,041,600
Revenue	1,705,776	2,117,328	1,807,700	1,770,400	1,935,800
Expenses					
Personnel Services	-	81,825	-	-	-
Materials & Services	5,151	131,667	111,000	-	152,500
Overhead	-	-	-	-	-
Total Expenses	-	213,492	111,000	-	152,500
Net Change	1,770,400	1,903,836	1,696,700	1,770,400	1,783,300
Other Resources					
Capital Outlay	-	(965,714)	(1,000,000)	-	-
Reserves	-	-	-	-	-
Debt Issuance	44,608	-	1,000,000	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	879,046	4,283,705	448,500	-	326,900
Inter-Program Transfers Out	(631,746)	-	-	(727,000)	-
Other Resources Provided (Used)	-	3,317,991	448,500	(727,000)	326,900
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	1,992,533	5,221,827	2,145,200	1,043,400	2,110,200
Ending Restricted Reserves	3,036,608	994,333	-	-	-
Ending Unrestricted Reserves	(836,604)	4,003,898	5,225,800	6,041,600	8,151,800
Total Ending Reserves	\$ 2,200,004	\$ 4,998,231	\$ 5,225,800	\$ 6,041,600	\$ 8,151,800

# Board of Commissioners

In the last couple of years, the Homes for Good Board of Commissioners is being included in more of the Agency business. Meetings and work sessions have expanded the involvement of the Board in the decision-making at Homes for Good. Costs associated with the potential transition to a new composition of the Board are included in the new budget, as well as the usual travel and training expenses.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	(12,900)	(6,600)	(12,800)
Total Beginning Reserves	-	-	(12,900)	(6,600)	(12,800)
Revenue	-	-	-	-	-
Expenses					
Personnel Services	-	-	-	-	-
Materials & Services	24,800	6,578	18,900	6,200	18,900
Overhead	-	-	-	-	-
Total Expenses	24,800	6,578	18,900	6,200	18,900
Net Change	(24,800)	(6,578)	(18,900)	(6,200)	(18,900)
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(24,800)	(6,578)	(18,900)	(6,200)	(18,900)
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	(6,578)	(31,800)	(12,800)	(31,700)
Total Ending Reserves	\$ -	\$ (6,578)	\$ (31,800)	\$ (12,800)	\$ (31,700)

# Executive

The Executive Budget captures activities of the Homes for Good admin team, Executive Director, Communications Director as well as admin support staff. The FY21 activities for the Executive Team include costs associated with strategic planning, regular public relations and affairs support, diversity equity and inclusion initiatives, relevant training, membership and representation at advocacy opportunities for affordable housing.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	(923,000)	(455,000)	(860,200)
Total Beginning Reserves	-	-	(923,000)	(455,000)	(860,200)
Revenue	10,000	-	-	10,000	-
Expenses					
Personnel Services	495,982	405,563	370,500	369,200	411,300
Materials & Services	78,584	49,498	110,300	46,000	115,300
Overhead	-	-	-	-	-
Total Expenses	574,566	455,061	480,800	415,200	526,600
Net Change	(564,566)	(455,061)	(480,800)	(405,200)	(526,600)
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(564,566)	(455,061)	(480,800)	(405,200)	(526,600)
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	(455,061)	(1,403,800)	(860,200)	(1,386,800)
Total Ending Reserves	\$ -	\$ (455,061)	\$ (1,403,800)	\$ (860,200)	\$ (1,386,800)

# Finance

The Finance Department is dedicated to providing accurate, complete, and timely information to Homes for Good leadership, departments, and external business partners. The Finance Department also prepares an annual financial statement for all agency activities, and facilitates the annual budgeting process.



	<u>2019 BUDGET</u>	<u>2019 ACTUAL</u>	<u>2020 BUDGET</u>	<u>2020 PROJECTED</u>	<u>2021 BUDGET</u>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	(796,600)	(475,400)	(925,600)
Total Beginning Reserves	-	-	(796,600)	(475,400)	(925,600)
Revenue	-	-	-	-	-
Expenses					
Personnel Services	431,923	407,326	453,700	402,400	423,500
Materials & Services	36,681	68,035	45,600	47,800	45,600
Overhead	-	-	-	-	-
Total Expenses	468,604	475,361	499,300	450,200	469,100
Net Change	(468,604)	(475,361)	(499,300)	(450,200)	(469,100)
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(468,604)	(475,361)	(499,300)	(450,200)	(469,100)
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	(475,361)	(1,295,900)	(925,600)	(1,394,700)
Total Ending Reserves	\$ -	\$ (475,361)	\$ (1,295,900)	\$ (925,600)	\$ (1,394,700)



# Human Resources



The Human Resources (HR) Department has, and will continue to morph into a team that plans for and helps implement change. HR supports continuous improvement of the employee experience following change. HR's role is to be a strategic partner, an employee sponsor and advocate, a policy enforcer, a team leader, and a talent management ambassador. The HR Team will be instrumental in the Equity and Diversity work and various trainings that will continue in FY 21.

	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	(407,600)	(225,900)	(455,100)
Total Beginning Reserves	-	-	(407,600)	(225,900)	(455,100)
Revenue	750	750	700	800	700
Expenses					
Personnel Services	159,063	164,838	144,500	182,200	150,300
Materials & Services	43,500	61,813	36,000	47,800	48,000
Overhead	-	-	-	-	-
Total Expenses	202,563	226,651	180,500	230,000	198,300
Net Change	(201,813)	(225,901)	(179,800)	(229,200)	(197,600)
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(201,813)	(225,901)	(179,800)	(229,200)	(197,600)
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	(225,901)	(587,400)	(455,100)	(652,700)
Total Ending Reserves	\$ -	\$ (225,901)	\$ (587,400)	\$ (455,100)	\$ (652,700)

# Information Technology

The IT Department supports agency-wide communications and data infrastructure. This is accomplished through administration, training, and maintenance of multiple networks, servers, applications, 70+ mobile devices, connections for telephones, 150+ computers, 70+ printers, copiers, and scanners all in order for our 90+ employees to provide services to our clients while ensuring compliance, security, and cost-effectiveness. HFG has an ever-growing reliance on IT resources. Our environment continues to grow in capability and complexity with the addition of remote work and remote access in response to the COVID-19 pandemic.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	(406,300)	(207,000)	(380,300)
Total Beginning Reserves	-	-	(406,300)	(207,000)	(380,300)
Revenue	-	-	-	-	64,800
Expenses					
Personnel Services	154,254	128,692	172,000	117,900	187,900
Materials & Services	123,707	78,342	61,100	55,400	175,800
Overhead	-	-	-	-	-
Total Expenses	277,961	207,034	233,100	173,300	363,700
Net Change	(277,961)	(207,034)	(233,100)	(173,300)	(298,900)
Other Resources					
Capital Outlay	-	-	(20,000)	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	(20,000)	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(277,961)	(207,034)	(253,100)	(173,300)	(298,900)
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	(207,034)	(659,400)	(380,300)	(679,200)
Total Ending Reserves	\$ -	\$ (207,034)	\$ (659,400)	\$ (380,300)	\$ (679,200)

# Communications

The Homes for Good Communications Team focuses on outreach and engagement with the community as well as the people served by our programs and our employees. Work tasks include media, press relations, employee newsletters and communication, as well as maintaining social media channels, public outreach and meetings surrounding new real estate developments. Communications fosters and helps grow partnerships, and focuses on relationship building with the community.

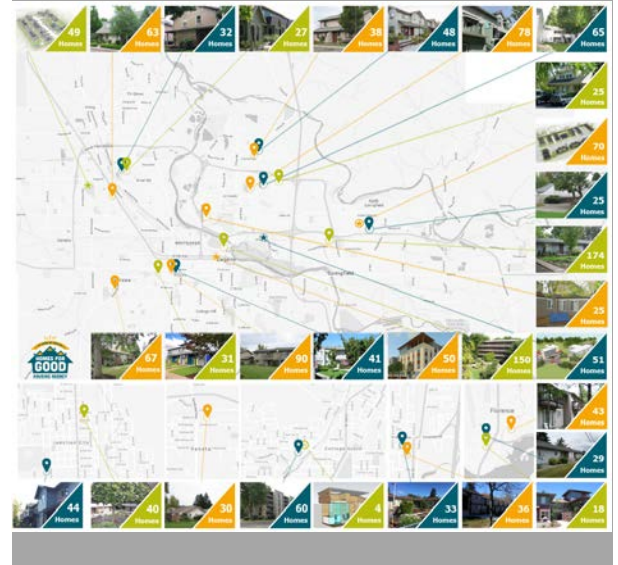


	<u>2019 BUDGET</u>	<u>2019 ACTUAL</u>	<u>2020 BUDGET</u>	<u>2020 PROJECTED</u>	<u>2021 BUDGET</u>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	(9,600)	(23,800)	(33,400)
Total Beginning Reserves	-	-	(9,600)	(23,800)	(33,400)
Revenue	-	-	-	-	-
Expenses					
Personnel Services	32,489	17,319	39,100	9,000	43,100
Materials & Services	5,200	6,506	17,200	600	17,200
Overhead	-	-	-	-	-
Total Expenses	37,689	23,825	56,300	9,600	60,300
Net Change	(37,689)	(23,825)	(56,300)	(9,600)	(60,300)
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(37,689)	(23,825)	(56,300)	(9,600)	(60,300)
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	(23,825)	(65,900)	(33,400)	(93,700)
Total Ending Reserves	\$ -	\$ (23,825)	\$ (65,900)	\$ (33,400)	\$ (93,700)

# Housing Administration

The Supportive Housing Division is responsible for all areas of management of 842 Low-Income Housing units in Lane County and is staffed by the Supportive Housing Director, a Portfolio Manager, a Fee for Service Manager, a Division Analyst, a Contract Administrator, a Real Estate Specialist, three (3) Property Managers, four (4) Assistant Property Managers, and twenty-one (21) Maintenance Staff. The housing units managed by the Supportive Housing Division are geographically spread throughout Lane County and include housing units in Eugene, Springfield, Creswell, Cottage Grove, Junction City, Veneta, and Florence. The Supportive Housing Division manages

multiple programs and waiting lists for 595 Public Housing units, 100 units of former Public Housing single-family homes and duplexes in the process of being sold and subsidies transferred to new construction, twenty-five (25) Section 8 New Construction units, ninety (90) Low-Income units and two (2) complexes with a mix of PBRA and Market Rate units. The Supportive Housing Division is responsible for the overall management, compliance, maintenance, rent calculation, leasing, lease enforcement, and other functions for all units.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	(809,500)	(506,400)	(1,000,500)
Total Beginning Reserves	-	-	(809,500)	(506,400)	(1,000,500)
Revenue	-	-	-	-	-
Expenses					
Personnel Services	403,547	463,629	371,100	451,000	531,000
Materials & Services	48,461	42,783	39,700	43,100	39,700
Overhead	-	-	-	-	-
Total Expenses	452,008	506,412	410,800	494,100	570,700
Net Change	(452,008)	(506,412)	(410,800)	(494,100)	(570,700)
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(452,008)	(506,412)	(410,800)	(494,100)	(570,700)
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	(506,412)	(1,220,300)	(1,000,500)	(1,571,200)
Total Ending Reserves	\$ -	\$ (506,412)	\$ (1,220,300)	\$ (1,000,500)	\$ (1,571,200)

**Note: This budget was previously called  
Fairview Administration**



# Maintenance Fee for Service

The Supportive Housing Division includes a Fee For Service Maintenance Team. This team provides a both highly skilled maintenance/contractor services to AMPs and housing complexes, as well as general labor, janitorial, and landscaping services. This team supports the smooth operation of all housing AMPs and complexes, assists with the turnover of vacant units, maintains the Homes for Good administration office, and decreases our reliance on costly outside contract services.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	34,100	(81,600)	22,800
Total Beginning Reserves	-	-	34,100	(81,600)	22,800
Revenue	592,851	454,063	556,500	585,100	550,200
Expenses					
Personnel Services	509,839	475,218	512,400	421,000	503,200
Materials & Services	88,413	60,412	62,100	59,700	47,000
Overhead	-	-	-	-	-
Total Expenses	598,252	535,630	574,500	480,700	550,200
Net Change	(5,401)	(81,567)	(18,000)	104,400	-
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(5,401)	(81,567)	(18,000)	104,400	-
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	(81,567)	16,100	22,800	22,800
Total Ending Reserves	\$ -	\$ (81,567)	\$ 16,100	\$ 22,800	\$ 22,800

# Day Island Building

The Homes for Good Day Island Office was located at 177 Day Island Rd in Eugene, OR right next to the entrance to Alton Baker Park.

This building was sold in July 2018, and Homes for Good continued operations from the building until the 100 W 13th Ave location remodel was complete in April 2020.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	(208,500)	(61,800)	(149,000)
Total Beginning Reserves	-	-	(208,500)	(61,800)	(149,000)
Revenue	67,098	-	110,800	-	-
Expenses					
Personnel Services	23,435	10,194	15,600	11,000	-
Materials & Services	83,277	51,568	168,700	76,200	-
Overhead	-	-	-	-	-
Total Expenses	106,712	61,762	184,300	87,200	-
Net Change	(39,614)	(61,762)	(73,500)	(87,200)	-
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(39,614)	(61,762)	(73,500)	(87,200)	-
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	(61,762)	(282,000)	(149,000)	(149,000)
Total Ending Reserves	\$ -	\$ (61,762)	\$ (282,000)	\$ (149,000)	\$ (149,000)

**Note: This budget is being moved to combine with the 100 W 13th Ave budget, and will be removed in the FY23 budget document.**

# Fairview Building

The Homes for Good Fairview building is located at 300 W Fairview in Springfield, OR in the middle of our AMP 200 complex called McKenzie Village. This site also includes leased space for a Head Start of Lane County building, and provides office space to two Lane County Parole and Probation Officers. The Supportive Housing Division, Capital Projects Team, and Energy Services Division moved offices out of the Fairview Building and into the 100 W 13th Ave building and individual site offices in April 2020 after the remodel of the 100 W 13th Ave Building.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	(184,900)	(76,000)	(170,500)
Total Beginning Reserves	-	-	(184,900)	(76,000)	(170,500)
Revenue	46,203	-	56,800	-	56,800
Expenses					
Personnel Services	23,598	30,751	37,100	38,300	33,000
Materials & Services	61,037	45,371	3,100	56,200	3,100
Overhead	-	-	-	-	-
Total Expenses	84,635	76,122	40,200	94,500	36,100
Net Change	(38,432)	(76,122)	16,600	(94,500)	20,700
Other Resources					
Capital Outlay	-	-	(30,000)	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	30,000	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(38,432)	(76,122)	16,600	(94,500)	20,700
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	(76,122)	(168,300)	(170,500)	(149,800)
Total Ending Reserves	\$ -	\$ (76,122)	\$ (168,300)	\$ (170,500)	\$ (149,800)

# Capital Projects Administration

HUD's annual CAP grant includes a 10% allocation of funds for administration of Capital Fund Activities. These costs include duties related to general capital planning, preparation of the Annual Plan, processing of e-LOCCS, preparation of reports, drawing of funds, budgeting, accounting, and the procurement of construction and other miscellaneous contracts.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	-	-	(22,200)	(15,500)	(32,800)
Total Beginning Reserves	-	-	(22,200)	(15,500)	(32,800)
Revenue	137,580	96,552	113,600	96,600	113,600
Expenses					
Personnel Services	122,280	99,973	96,600	94,100	-
Materials & Services	15,940	12,060	15,800	19,800	-
Overhead	-	-	-	-	-
Total Expenses	138,220	112,033	112,400	113,900	-
Net Change	(640)	(15,481)	1,200	(17,300)	113,600
Other Resources					
Capital Outlay	-	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	-	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	(640)	(15,481)	1,200	(17,300)	113,600
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	-	(15,481)	(21,000)	(32,800)	80,800
Total Ending Reserves	\$ -	\$ (15,481)	\$ (21,000)	\$ (32,800)	\$ 80,800



# Fleet

The Homes for Good fleet consists of thirty-six (36) vehicles which are used by Maintenance Workers, Property Managers, Energy Auditors, Section 8 Inspectors, and other staff.

The Homes for Good Fleet was previously managed by a Committee made up of staff from various departments and divisions. In 2020, this duty was taken over by the Office Administrative Coordinator.



	<b><u>2019 BUDGET</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ -	\$ -	\$ -
Beginning Unrestricted Reserves	(81,660)	-	91,000	(6,000)	(800)
Total Beginning Reserves	(81,660)	-	91,000	(6,000)	(800)
Revenue	78,000	42,869	79,700	57,000	51,600
Expenses					
Personnel Services	70	1,193	8,400	2,000	36,900
Materials & Services	1,050	47,759	14,700	3,200	14,700
Overhead	1,621	-	-	-	-
Total Expenses	2,741	48,952	23,100	5,200	51,600
Net Change	75,259	(6,083)	56,600	51,800	-
Other Resources					
Capital Outlay	(50,000)	-	-	-	-
Reserves	-	-	-	-	-
Debt Issuance	-	-	-	-	-
Debt Service	-	-	-	-	-
Inter-Program Transfers In	-	-	-	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	(50,000)	-	-	-	-
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	25,259	(6,083)	56,600	5,200	-
Ending Restricted Reserves	-	-	-	-	-
Ending Unrestricted Reserves	(56,401)	(6,083)	147,600	(800)	(800)
Total Ending Reserves	\$ (56,401)	\$ (6,083)	\$ 147,600	\$ (800)	\$ (800)

# 100 W 13th Ave

In 2017 Homes for Good went through a process of finding a location for a new service center location to fulfill the strategic goal of bringing both of our office locations together to create better efficiencies, and better access for program participants. For FY19 the building remained as one of our commercial rental properties, housing five tenants. Homes for Good moved into its new space in April 2020.



	<b><u>2019 PROJECTED</u></b>	<b><u>2019 ACTUAL</u></b>	<b><u>2020 BUDGET</u></b>	<b><u>2020 PROJECTED</u></b>	<b><u>2021 BUDGET</u></b>
Beginning Restricted Reserves	\$ -	\$ -	\$ 8,000,000	\$ 5,193,000	\$ -
Beginning Unrestricted Reserves	49,100	-	146,000	-	(49,100)
Total Beginning Reserves	49,100	-	8,146,000	5,193,000	(49,100)
Revenue	495,500	467,116	667,200	495,500	899,100
Expenses					
Personnel Services	4,400	613	9,500	4,400	36,900
Materials & Services	394,200	490,894	452,700	269,200	143,200
Overhead	-	-	-	-	-
Total Expenses	398,600	491,507	462,200	273,600	180,100
Net Change	96,900	(24,391)	205,000	221,900	719,000
Other Resources					
Capital Outlay	-	(200,642)	(8,000,000)	(4,789,000)	-
Reserves	-	-	(40,000)	-	(40,000)
Debt Issuance	8,000,000	9,203,000	-	-	-
Debt Service	-	(3,784,967)	(309,100)	(675,000)	(675,000)
Inter-Program Transfers In	-	-	115,000	-	-
Inter-Program Transfers Out	-	-	-	-	-
Other Resources Provided (Used)	8,000,000	5,217,391	(8,234,100)	(5,464,000)	(715,000)
Excess (Deficiency) of Revenue Over (Under) Total Expenses and Other Resources	8,096,900	5,193,000	(8,029,100)	(5,242,100)	4,000
Ending Restricted Reserves	8,000,000	5,193,000	-	-	-
Ending Unrestricted Reserves	146,000	-	116,900	(49,100)	(45,100)
Total Ending Reserves	\$ 8,146,000	\$ 5,193,000	\$ 116,900	\$ (49,100)	\$ (45,100)

# FTE SUMMARY

Total FTE Budget for FY2019	98.00
-----------------------------	-------

## FTE Reductions:

Administrative Services Director	(1.00)
ASA-2 - Floater (Union)	(1.00)
Assistant Property Manager (Union)	(1.00)
Deputy Director	(1.00)
Federal Program Director	(1.00)
Hearings Officer	(0.50)
Real Estate Specialist (Union)	(1.00)
Janitor (Union)	(1.00)
Property Management Trainee (Union)	(1.00)
Property Management Division Director	(1.00)
Resident Services Worker (Union)	(1.00)

## FTE Additions:

ASA-2 ADA & HR Coordinator (Union)	1.00
Project Developer (Union)	1.00
Property Management Portfolio Manager	1.00
Office Assistant (Union)	1.00
Housing Specialist (Union)	2.00
Supportive Housing Division Director	1.00
Resident Aide (Union)	1.00
Energy Auditor (Union)	1.00

Total FTE Budget for FY2020	96.50
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Total FTE Budget for FY2020	96.50
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## FTE Reductions:

Accounting Specialist (Union)	(1.00)
Administrative Specialist (Union)	(0.50)
Janitor (Union)	(0.50)
Resident Aide (Union)	(1.00)

## FTE Additions:

Rent Assistance Supervisor (Union)	1.00
Project Developer (Union)	1.00
Real Estate Accountant (Union)	1.00
Veteran Housing Coordinator (Union)	1.00
Housing Specialist (Union)	1.00
Hearings Officer	0.50
Maintenance Worker (Union)	1.00
Office Assistant (union)	1.00
Resident Services Specialist (Union)	1.00

Total FTE Budget for 2021	102.00
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# TRANSFER SUMMARY

The following table is intended to provide summary information about Homes for Good inter-fund transfers. Budgeted inter-fund transfers for FY2021 are as follows:

	<u>Transfers-OUT</u>	<u>Transfers-IN</u>
Development	\$ (422,500)	\$ -
Family Self Sufficiency		11,600
ROSS		28,100
Shelter Plus Care		55,900
COCC		326,900
Total Transfers	<u>\$ (422,500)</u>	<u>\$ 422,500</u>

# LONG-RANGE FINANCIAL PLANNING

## **The Supportive Housing Division**

The Supportive Housing Division has been, and will continue, to be impacted by the economic challenges presented by the COVID-19 outbreak and associated unemployment. We continue to work to be agile in responding to the ever-changing landscape of this pandemic, as well as to future any potential future crisis. We continue to work through the RAD conversion, to increase site-based service structures, to build team capacity around applying DEI and supportive housing models, as well as working to integrate cross-functional teams and services into our business systems. The following highlight some of the upcoming projects and financial impacts for the Supportive Housing Division in the next fiscal year.

### **Operational Goals:**

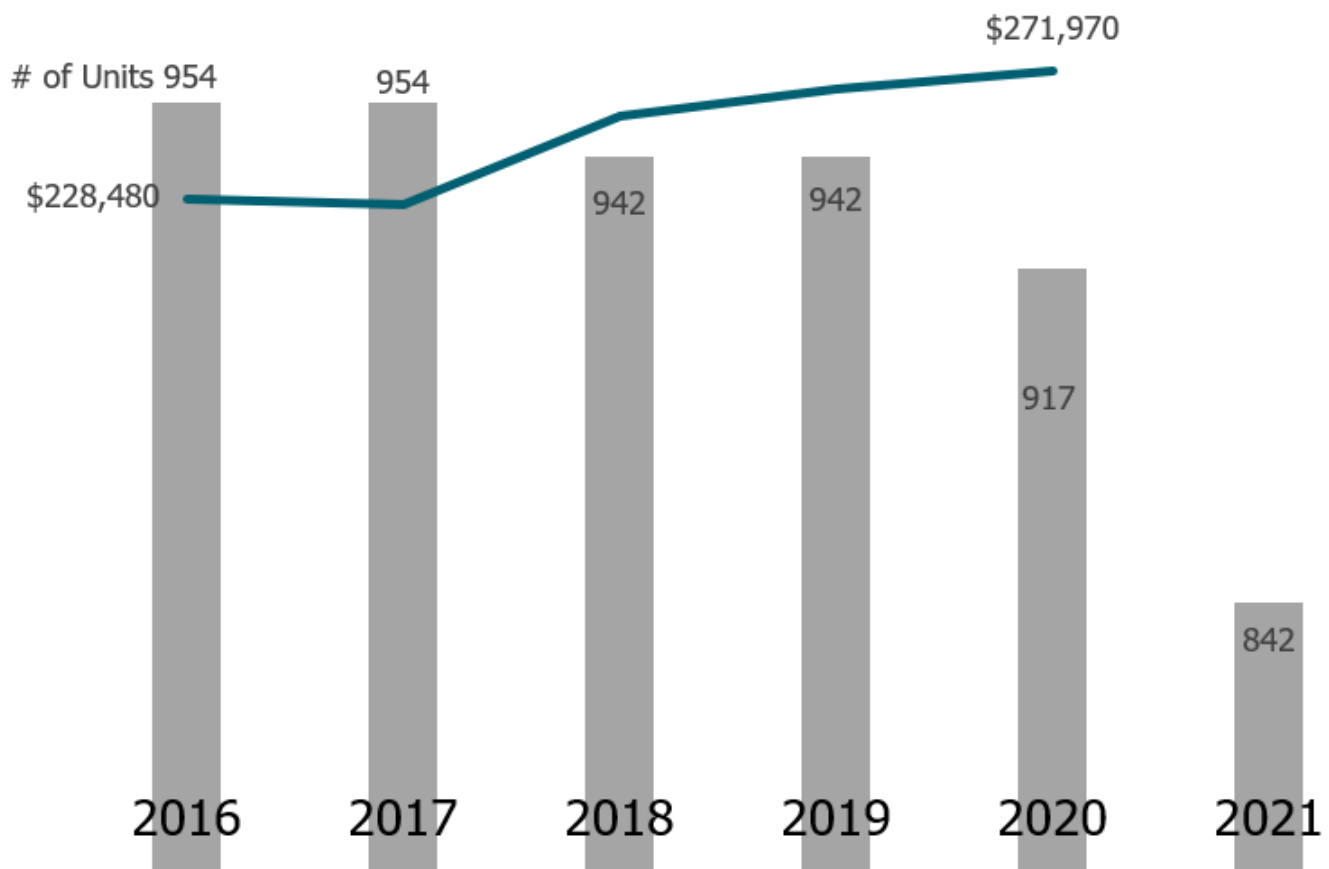
- Supportive Housing Division will serve a total of 902 households in 13 Public, Assisted and Affordable properties with an expected occupancy of 98% (921 units). SHD will also continue to manage the 75 remaining RAD homes until final sale and relocation in Spring 2021.
- Public Housing operating subsidy is expected to be reduced by roughly \$290,000 because of RAD with an expected proration similar 2020 of around 96%. Deadline for expending CARES act funding for Public Housing has been extended through December 2021 and will largely be expensed during FY21.
- Plan for budget impacts of reduced revenue due to lower resident incomes, lower rent collection rates and reduced operating subsidy reflecting the sale of the SS units.
- Invest in Continuity of Operations and Emergency Management planning including COOP consultants, emergency supplies and systems improvements.
- Complete the final RAD Phase II disposition of the Scattered Site units and transition of residents to new construction sites. Plan for budget impacts of reduced revenue related to this disposition.
- Invest in Spanish Translation Services (phase 1 – application, packets, etc.)
- 100% UPCS contracted inspections with REAC priority work list (REAC prep and meets annual HUD requirements).
- Continue to invest in additional Resident Services staff and programming to serve residents of Public and Assisted Housing.

# LONG-RANGE FINANCIAL PLANNING

## Maintenance:

- Invest in physical and technology upgrades to Public and Assisted housing site offices and maintenance shop spaces to facilitate greater site-based services and staff functions.
- Invest in testing and abatement of lead-based paint, mildew, Asbestos and another contaminant work as well as necessary staff training.
- Invest in additional safety, contaminant and emergency equipment and supplies.
- Continue maximizing in-house REAC prep work (landscape, siding, fences, concrete, etc.)
- Continue modernization of fleet management systems and upgrades to fleet vehicles.
- Continue working with Johnson Controls Inc. to track savings related to the EPC contract.

## Supportive Housing Division - Rent Charged vs. Number of Units

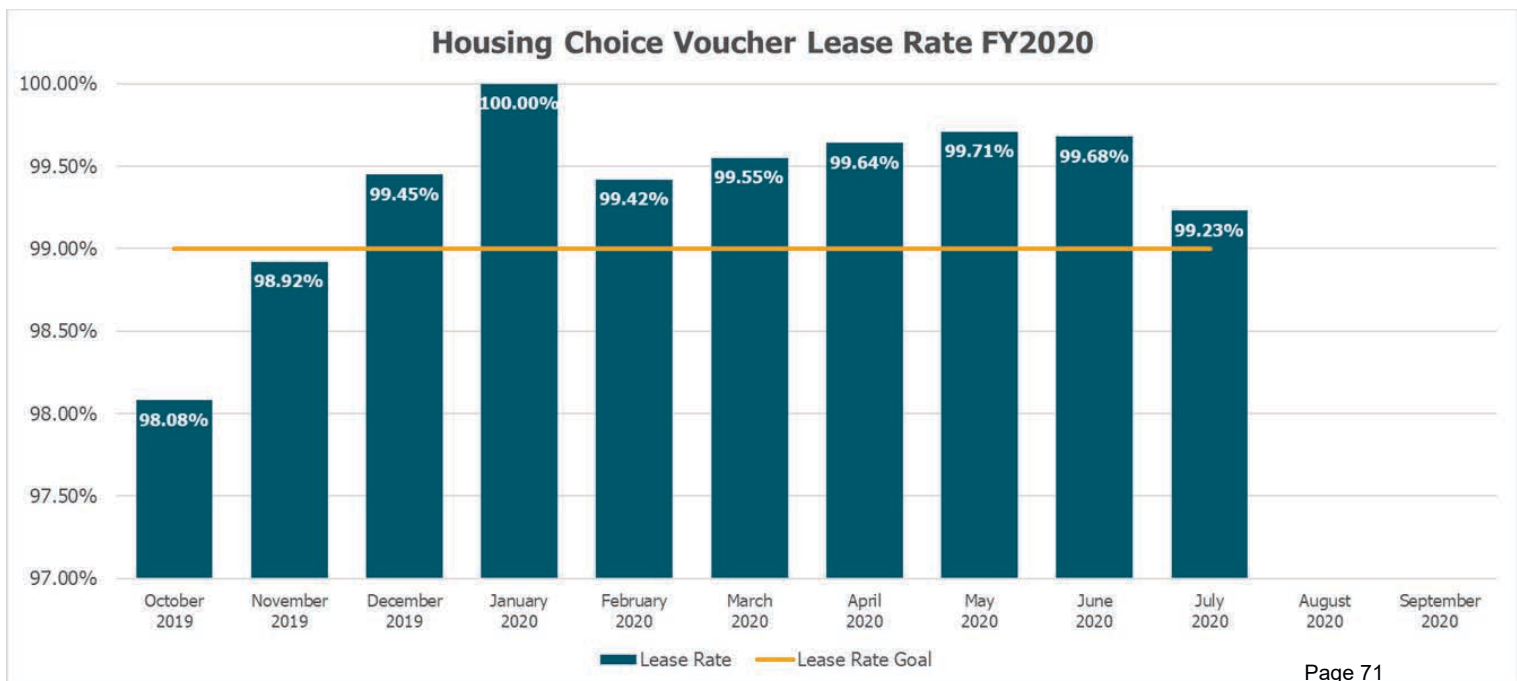


# LONG-RANGE FINANCIAL PLANNING

## Rent Assistance Division

### Lease Rate

The overall goal of the Section 8 Program is to maintain a lease rate of 100% while simultaneously utilizing all the dollars associated with the vouchers. For example, if a housing agency is provided 100 vouchers, and every voucher has an average of \$50.00 worth of rental assistance attached to it, then a housing agency could potentially lease up all 100 vouchers if the average cost of each voucher was \$50.00. However, if the average cost of each voucher is \$100.00 then a housing agency would only be able to utilize 50 of their vouchers. Adding another layer to the process, the funding HUD provides fluctuates. A housing agency may be told at the beginning of the year that they will be receiving \$50.00 worth of rental assistance only to find out the rental assistance has changed to \$40.00 per voucher. This fluctuation is defined by HUD as the “pro-ration factor.” CY20 resulted in an almost 100% pro-ration factor for funding. This allows Homes for Good to utilize 100% of the vouchers allocated to our jurisdiction. When a housing agency does not utilize all the funding allotted in a calendar year, it can impact funding levels in future years. Essentially, a use it or lose it approach is used, and HUD can decide to reallocate the funding not used by a housing agency. Homes for Good works closely with our local HUD field office in Portland. Homes for Good meets monthly with the HUD field office to review a HUD recommended tool (known as the Two-Year Tool) to help forecast utilization and funding rates, which helps ensure Homes for Good is using as many vouchers and all the funding allotted to our community. The Two-Year Tool is a multi-paged excel workbook that incorporates points of data such as voucher turn-over rates, average per unit costs and pro-ration levels to help Homes for Good make data driven decisions in administering the Section 8 Program. It is the overall goal for CY21 to utilize as many vouchers as funding levels dictate, and ensure the Rent Assistance Division is adequately staffed and cross trained to meet the demands of fluctuations in funding levels and new funding allocations.



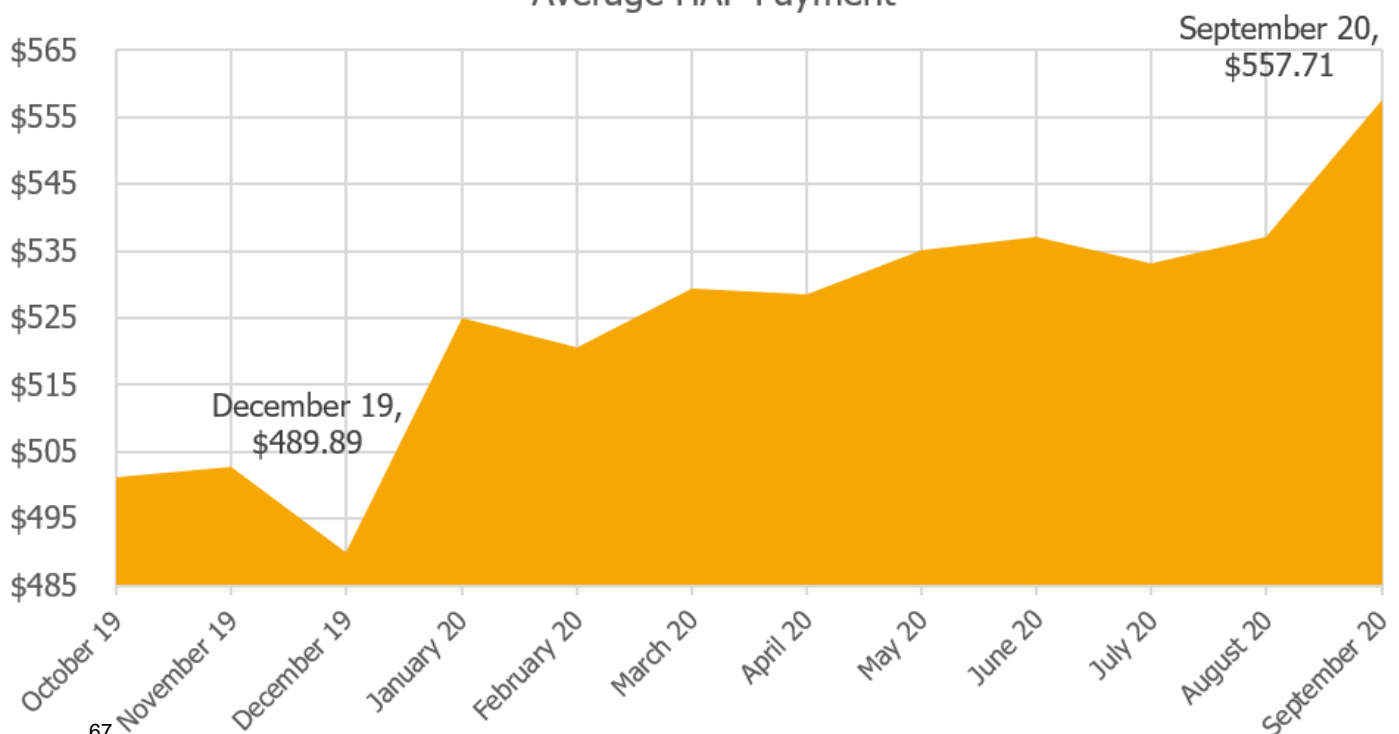
# LONG-RANGE FINANCIAL PLANNING

## Rent Assistance Division

### Average Housing Assistance Payment (HAP) Paid

HAP is the payment that is made to the landlord from Homes for Good monthly on behalf of the tenant. The average HAP is captured by assessing all HAP paid on tenant based vouchers and arriving at the average. Several factors can impact average HAP costs. One, the rental market: as overall rental prices in the community increase so does the average HAP amount. Two, Fair Market Rents (FMRs), which HUD establishes on a yearly basis. The Payment Standards for the tenant based voucher programs are derived from the FMRs. Homes for Good is required to remain between 90%-110% of FMR when setting its Payment Standard. Currently, Homes for Good's Payment Standards are set at 95% of FMR. Three, the income of the tenant: when the tenant doesn't have income, Homes for Good pays more HAP. When the tenant has more income Homes for Good pays less HAP. Under tenant based voucher programs, the tenant pays up to 40% of their adjusted gross income towards the overall cost of rent, during their initial lease terms, and Homes for Good provides the rest. For example, if a participant has zero income, then 40% of zero is zero, and Homes for Good pays the full contract rent (if the contract rent is within the limits of the Payment Standard and the unit is rent reasonable). In managing a tenant based voucher program it is important for Homes for Good to work with community partners and the Resident Services Team to ensure that participants in our programs are receiving appropriate benefits (for example: social security payments, which are counted as income), receiving educational opportunities, appropriate activities of daily living supports, etc. to ensure the overall viability of the program.

HCV Per Unit Cost (PUC)-  
Average HAP Payment





# LONG-RANGE FINANCIAL PLANNING

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## **Rent Assistance Division**

### **Admin Reserve and Homes for Good Held HAP Reserve**

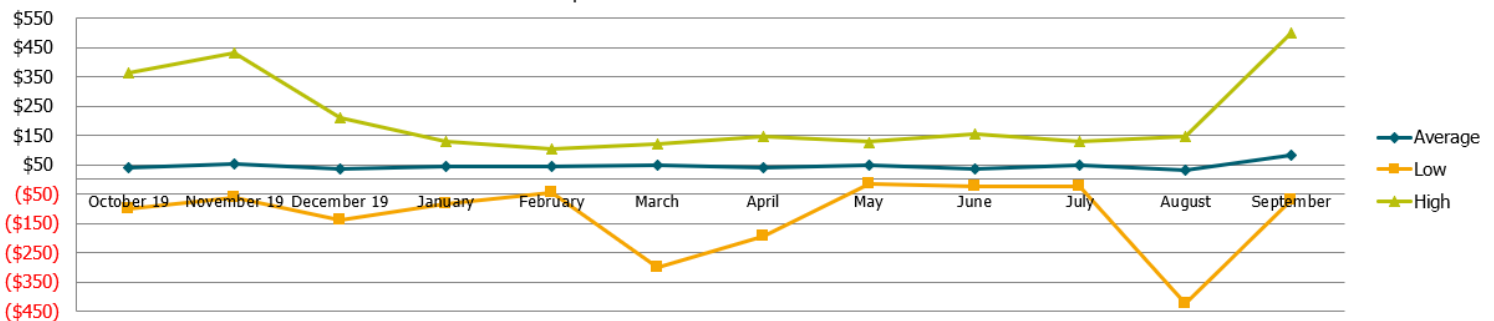
For every voucher leased, Homes for Good receives money from HUD to run the Housing Choice Voucher Programs. Admin fees pay for salaries, supplies, building space, and so on. However, HUD only pays Admin fees up to the number of units Homes for Good is required to lease. If Homes for Good leases up more than HUD allocated, HUD doesn't give Homes for Good more admin fees. Admin fee reserves are accumulated when the cost of running the program is lower than the fees received or Homes for Good budgeted for one proration factor, but HUD changed it later. For example, HUD tells Homes for Good they will provide \$100.00 in admin fees in January. In April HUD tells Homes for Good they will prorate the admin fee and will only be giving \$70.00. In November HUD tells Homes for Good it has changed the prorate again and will give \$90.00. HUD then goes back and prorates the calendar year at \$90.00. Homes for Good may have budgeted the entire year on the assumption they were getting \$70.00 every month. This change from HUD so late in the year could result in money being added to the reserves. Admin Fee Reserves are important to maintain as they can pad a program in years where the overall lease rate does not reach 100% or the pro-ration is lower than Homes for Good expected. Homes for Good is targeted to close CY20 with \$1.6 million in Admin Fee Reserves. HAP reserves are funds Homes for Good did not spend on HAP. For example, HUD provides Homes for Good with \$1,000 in HAP for the year. Homes for Good leases 50% of the vouchers provided and doesn't use all the HAP. Homes for Good uses \$500.00 in HAP. The remaining \$500.00 is held in reserves for future use. However, in setting a national budget HUD can look at HAP reserves of all PHAs and reallocate the money if they believe a PHA's HAP reserves have grown too large. HUD recommends reserves to be between 2% and 7% of the Annual Budget Authority. HAP reserves are important for Homes for Good to maintain as they can pad the program in years where the average HAP cost is higher than expected. For CY20 Homes for Good is targeted to end the year with 3.9% in HAP reserves. It is important to note that the projected Per Unit Cost (PUC) for CY21 is projected to grow from \$570 per month in January to \$615 per month by December. The projected PUC increase is largely due to reduced income sources as a result of COVID-19. If the projected PUC comes to fruition, Homes for Good would have a deficit of \$700,000. This projected deficit triggers Homes for Good to be in "shortfall status". When a PHA is in a shortfall status they receive additional oversight and historically, additional funds from HUD.

# LONG-RANGE FINANCIAL PLANNING

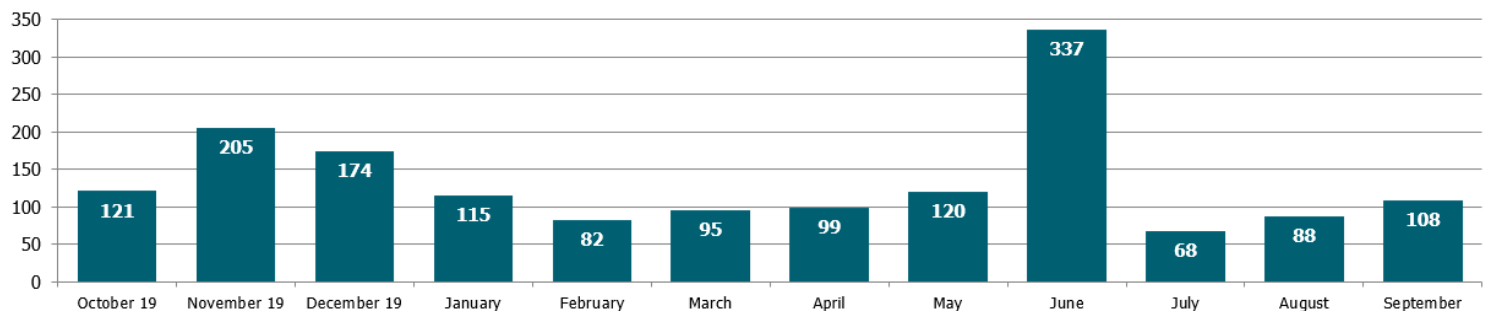
HCV - Rent Change Report - FY 2020

	October 19	November 19	December 19	January	February	March	April	May	June	July	August	September	Total	FY Total
Average	\$40.74	\$52.60	\$36.18	\$45.38	\$42.54	\$47.45	\$41.77	\$47.42	\$34.91	\$47.43	\$30.03	\$84.44	\$45.91	\$46.28
Low	(\$100.00)	(\$64.00)	(\$138.00)	(\$85.00)	(\$47.00)	(\$300.00)	(\$196.00)	(\$14.00)	(\$24.00)	(\$24.00)	(\$423.00)	(\$70.00)	(\$423.00)	(\$300.00)
High	\$365.00	\$431.00	\$211.00	\$130.00	\$102.00	\$121.00	\$145.00	\$127.00	\$156.00	\$130.00	\$148.00	\$500.00	\$500.00	\$457.00
Count	121	205	174	115	82	95	99	120	337	68	88	108	1612	1502
Total	\$4,929.00	\$10,784.00	\$6,296.00	\$5,219.00	\$3,488.00	\$4,508.00	\$4,135.00	\$5,690.00	\$11,765.00	\$3,225.00	\$2,643.00	\$9,119.00	\$71,801.00	\$69,512.00

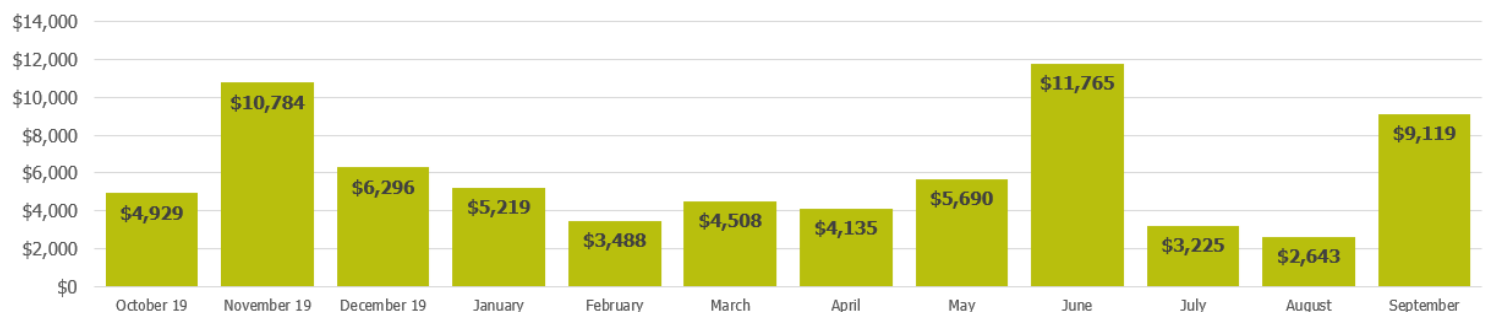
\$ Rent Increases for FY2020



Number of Rent Increases for FY2020



Sum of Contract Rent Increases for FY2020



# LONG-RANGE FINANCIAL PLANNING

## Real Estate Development (RED) Division

The Development Division has been successful in securing tax credit funding for five consecutive projects and is also pursuing other funding sources to provide needed housing in the community.

### New Construction

Homes for Good currently has 5 developments under construction with some nearing completion with another 2 projects slated to begin construction in this next fiscal year.

Projects under construction include:

Market District Commons- a mixed-use project in downtown Eugene, that will provide fifty (50) units of critically needed workforce and veteran housing. The project is a public/private collaboration with the Obie development team as part of a major re-development in the Market District. Construction began July 1, 2019 and will be completed in October of 2020.

Housing First on MLK- a partnership with Lane County to provide fifty-one (51) units of housing for homeless people struggling with addiction. OHCS awarded 3 million dollars to the project and the remainder was funded by 11 different funding sources including private grants from health care providers and HOME funds to name a few. Construction began in late 2019 and will be complete in late 2020 or early 2021.

Approval was received through RAD to convert 100 units of Public Housing Scattered Sites into two replacement projects which are currently under Construction. Funding for these came from 4% tax credits and bonds as well as future sale proceeds from the scattered site sales.

Sarang- Located in West Eugene next to Willamette High School and Malabon Elementary, Sarang will provide 49 two, three and four-bedroom units in an ideal location for families with school age children.

Hayden Bridge Landing- Located next to Fred Meyer in Springfield on 5th Street will provide 70 new one, two and three-bedroom units in an area with great access to transportation, shopping and schools. Construction on these two developments started in early 2020 and is expected to complete in late spring of 2021

Legion Cottages – Located just north of Riverview Terrace in Cottage Grove Oregon, Legion Cottages is a partnership with the University of Oregon School of Architecture and will provide 4 tiny homes for veterans. These homes were partially funded by a grant from Lane County with Homes for Good providing a remainder of the funds.

# LONG-RANGE FINANCIAL PLANNING

## Real Estate Development (RED) Division

### **New Construction (Continued)**

The Homes for Good RED Team continues to look for partnerships to create affordable housing opportunities throughout the county including Florence, Oakridge, Cottage Grove, Junction City and Creswell.

Homes for Good will also look for any and all opportunities to provide assistance in rebuilding communities in Lane County that have been impacted by the wildfires.

### **Preservation Projects**

Homes for Good recently refinanced and consolidated loans on Jacob's Lane, Laurel Gardens and Willakenzie Townhomes. With a portion of the loan proceeds Homes for Good staff will oversee much needed Capital Projects on those three properties.

Homes for Good Real Estate staff have been working closely with the ownership board of Olive Plaza, a 150-unit subsidized senior housing facility in downtown Eugene to determine the best path to preserving the building. The building in downtown Eugene needs extensive rehabilitation work including both envelope and structural work. Homes for Good is conducting due diligence to identify the scope of needed work as well as possible funding sources.

Homes for Good is currently reviewing its property portfolio and in the planning stages for future preservation projects.

### **Developer Fees**

Historically the operating costs for the Development staff, pre-development project costs and subsidies for other agency activities such as COCC were funded with development fee revenue generated by previous projects. Due to the large number of projects to be completed in 2021, Homes for Good is expected to receive over \$2 million dollars in developer fees. This year as in past years, this money will be put into an unrestricted development reserve (estimated \$750,000) and be used to supplement other Agency operations. Homes for Good will also see proceeds from RAD scattered site home sales. The first \$13 million of proceeds will need to be re-invested in the replacement housing. The remaining proceeds (estimated at around \$4 million) will be placed in a designated account as required by HUD to be used for real estate development housing activities.

# LONG-RANGE FINANCIAL PLANNING

## Real Estate Development (RED) Division





# LONG-RANGE FINANCIAL PLANNING

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## Real Estate Development (RED) Division

### **PRE 2008**

195 new units

1998 Jacobs Lane 63 units  
2004 Sheldon Village 78 units  
2007 Turtle Creek – 27 units  
2008 New Winds – 18 units

### **2008-2013**

45 new units

2010 - Roosevelt Crossing 45 units

### **2013-2018**

102 new units

2016 Bascom Village Phase II 48 units  
2017 The Oaks at 14th – 54 units

### **2018-2023**

534 new units

2020 Legion Cottages 4 units  
2020 Market District Commons 50 units  
2020 The Commons on MLK 51 units  
2021 Hayden Bridge Landing 70 units  
2021 Sarang 49 units  
2021 13th + Tyler 15 units  
2022 1100 Charnelton 45 units

### **Planned**

2023 50 units Family - Rural  
2023 Target 100 units minimum split Metro and Rural  
2024 Glenwood Place 100 units



# GLOSSARY OF TERMS

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ABA	Annual Housing Assistance Payment Budget
ADA	Americans with Disabilities Act
AMP	Asset Management Project
CAP	Capital Projects
COCC	Central Office Cost Center
CY	Calendar Year
DEI	Diversity, Equity, and Inclusion
DHP	Ductless Heat Pump
EHA	Emergency Housing Assistance
e-LOCCs	Electronic Line of Credit Control System
EPC	Energy Performance Contracting
FFS	Fee for Service
FMR	Fair Market Rent
FSS	Family Self Sufficiency
FTE	Full-Time Equivalent
FY	Fiscal Year
HAP	Housing Assistance Payment
HCV	Housing Choice Voucher
HR	Human Resources
HUD	U.S. Department of Housing and Urban Development
IT	Information Technologies
LED	Light Emitting Diode
LTD	Lane Transit District
OHCS	Oregon Housing and Community Services
PBRA	Project Based Rent Assistance
PBV	Project Based Voucher
PH	Public Housing
RAB	Resident Advisory Board
RAD	Rental Assistance Demonstration
REAC	Real Estate Assessment Center
ROSS	Resident Opportunities and Supportive Services
S8	Section 8
UPCS	Uniform Physical Condition Standard
VASH	Veterans Assistance for Supportive Housing

IN THE BOARD OF COMMISSIONERS OF THE  
HOMES FOR GOOD HOUSING AGENCY, OF LANE COUNTY, OREGON

ORDER 20-30-09-01H

In the Matter of Adopting the 2020-2021  
Budget

WHEREAS, it is necessary for the Board to adopt a 2020-2021 fiscal year budget for the Homes for Good Housing Agency and

WHEREAS, the Homes for Good Housing Agency Executive Director has recommended approval of the proposed Homes for Good budget for the 2020/2021 fiscal year; and

WHEREAS, the Board having fully considered the Executive Director's recommendation,  
NOW, THEREFORE, IT IS HEREBY

ORDERED, that the 2020/2021 fiscal year budget for Homes for Good Housing Agency as set forth below, is hereby adopted; and

FURTHER ORDERED, that the amounts for the fiscal year beginning October 1, 2020, and for the purposes shown below, are hereby approved:

Community Services	\$ 4,682,800
Housing & COCC	\$ 10,914,100
Rent Assistance	\$ 25,551,700
Total	\$ 41,148,600

ADOPTED, by the Homes for Good Housing Agency of Lane County, Oregon

DATED this \_\_\_\_\_ day of \_\_\_\_\_, 2020

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Chair,  
Homes for Good Board of Commissioners



# BOARD OF COMMISSIONERS AGENDA ITEM

**BOARD MEETING DATE:** 09/30/2020

**AGENDA TITLE:** In the Matter of Approving the Public Housing Operating Budget for the Fiscal Year Ending September 30, 2021

**DEPARTMENT:** Finance

**CONTACT :** Jeff Bridgens, Finance Director

**EXT:** 2525

**PRESENTER:** Jeff Bridgens, Finance Director

**EXT:** 2525

**ESTIMATED TIME :** 10 minutes

- ☒ **ORDER/RESOLUTION**
- ☐ **PUBLIC HEARING/ORDINANCE**
- ☐ **DISCUSSION OR PRESENTATION (NO ACTION)**
- ☐ **APPOINTMENTS**
- ☐ **REPORT**
- ☐ **PUBLIC COMMENT ANTICIPATED**

**Approval Signature**

**EXECUTIVE DIRECTOR:**

A handwritten signature in black ink, appearing to be "J. Bridgens", is written over a horizontal line.

**DATE:** 9/22/20

**LEGAL STAFF :**

**DATE:**

**MANAGEMENT STAFF:**

**DATE:**



## **HOMES FOR GOOD MEMORANDUM**

**TO:** Homes for Good Board of Commissioners

**FROM:** Jeff Bridgens, Finance Director  
Jacob Fox, Executive Director

**AGENDA ITEM TITLE:** ORDER 20-30-09-02H/In the Matter of Approving the Public Housing Operating Budget for the Fiscal Year Ending September 30, 2021

**AGENDA DATE:** September 30<sup>th</sup>, 2020

### **I MOTION**

It is moved that the Order/Resolution be adopted approving the Public Housing operating budget for the fiscal year ending September 30, 2021

### **II ISSUE**

HUD requires the Board to review and approve the Public Housing Operating Budget

### **III DISCUSSION**

#### **A. Background**

This Order/Resolution approves the Agency's fiscal year operating budget for Public Housing. There are six public housing asset management project (AMP) budgets as well as a separate budget for the central office cost center (COCC). HUD requires Board approval for each of these budgets.

#### **B. Analysis**

Attached is a site budget for each of the Agency's Public Housing asset management projects (AMPs). Major revenues for the AMPs include tenant rents and HUD's operating subsidy. Revenue from tenant rent is budgeted at approximately \$2 million which is approximately equal to fiscal year 2020. The operating subsidy budgeted for fiscal year 2021 is higher than the operating subsidy budgeted for 2020 by approximately \$284,000 as was based on the amounts actually received during 2020. During 2020 the operating subsidy was affected by EPC positively. Total budgeted AMP expenses of approximately \$4.2 million are higher than the total budgeted AMP expenses for FY2020 by approximately \$152,500. A net cashflow surplus of \$343,800 is anticipated for fiscal year 2021.

Also attached is a budget for the Agency's Central Office Cost Center (COCC). Under HUD's model, the COCC is analogous to the administrative office of a private property management company. Separate cost centers are created for each of the various budgets which collectively make up the COCC. The

revenues of the COCC include management fees, bookkeeping fees, and asset management fees that are charged to the AMPs. The revenue also includes fees for service for painters or specialized maintenance workers. Fees for service are based on the anticipated needs of property managers. The COCC revenues are expected to exceed \$3.6 million for fiscal year 2021 and are higher than FY2020 budgeted COCC revenues by approximately \$279,600. The change is a result adding administrative building rents for an entire year of operation and increased management fees. COCC expenses are expected to be approximately \$3.1 million for fiscal year 2021 and are comparable to the prior fiscal year. The COCC is budgeted to have surplus of \$106,400 for fiscal year 2021.

C. Alternatives/Options

HUD requires that the Board approve next fiscal year's Public Housing Operating budget by September 30, 2020.

D. Recommendation

Approval of the proposed motion is recommended.

E. Timing

HUD requires that the Board approve the next fiscal year's Public Housing Operating Budget by September 30, 2020.

**IV IMPLEMENTATION/FOLLOW-UP**

Same as Item III.E.

**V ATTACHMENTS**

1. Public Housing and COCC combined
2. HUD Form 52574 – PHA Board Resolution

**Homes For Good Housing Agency  
AMPS & COCC  
Budget 10/01/20 - 9/30/21**

	AMP 100	AMP 200	AMP 300	AMP 400	AMP 500	AMP 600	CAP	Total AMPs	COCC	Combined Totals
<b>REVENUE</b>										
Net Tenant Rental Revenue	94,000	673,900	200,000	480,500	315,000	231,000	-	1,994,400	938,600	2,933,000
Tenant Revenue - Other (Laundry)	-	-	-	9,800	2,600	5,400	-	17,800	-	17,800
<b>Total Tenant Revenue</b>	<b>94,000</b>	<b>673,900</b>	<b>200,000</b>	<b>490,300</b>	<b>317,600</b>	<b>236,400</b>	<b>-</b>	<b>2,012,200</b>	<b>938,600</b>	<b>2,950,800</b>
HUD PHA Operating Grants (Subsidy)	129,000	623,300	188,000	350,000	355,000	227,400	-	1,872,700	-	1,872,700
Capital Grants	-	41,200	15,000	-	-	100,000	1,422,000	1,578,200	-	1,578,200
Management Fees	-	-	-	-	-	-	-	-	715,200	715,200
Bookkeeping Fees	-	-	-	-	-	-	-	-	53,000	53,000
Asset Management Fee	-	-	-	-	-	-	-	-	71,400	71,400
Housing Choice Voucher Program Bookkeeping Fee	-	-	-	-	-	-	-	-	267,700	267,700
Housing Choice Voucher Program Management Fee	-	-	-	-	-	-	-	-	642,450	642,450
Maintenance Fee for Service	-	-	-	-	-	-	-	-	550,200	550,200
Fleet	-	-	-	-	-	-	-	-	51,600	51,600
Frontline charges	-	-	-	-	-	-	-	-	367,650	367,650
Other	2,000	12,200	10,200	75,000	9,600	6,100	-	115,100	18,000	133,100
<b>Total Revenue</b>	<b>225,000</b>	<b>1,350,600</b>	<b>413,200</b>	<b>915,300</b>	<b>682,200</b>	<b>569,900</b>	<b>1,422,000</b>	<b>5,578,200</b>	<b>3,675,800</b>	<b>9,254,000</b>
<b>EXPENSES</b>										
Administrative Salaries	25,600	117,100	36,800	110,200	87,900	71,900	134,800	584,300	1,198,800	1,783,100
Administrative Fringe	17,800	74,300	23,900	65,800	61,300	43,300	89,800	376,200	647,300	1,023,500
Temporary Help	-	-	-	-	-	-	-	-	14,000	14,000
Auditing Fees	1,000	4,000	1,500	3,000	3,100	4,000	-	16,600	3,000	19,600
Management Fee	19,500	131,700	27,600	99,700	61,600	65,400	-	405,500	-	405,500
Bookkeeping Fee	2,600	17,400	3,300	13,200	7,400	8,400	-	52,300	-	52,300
Advertising and Marketing	-	-	-	-	-	-	-	-	1,100	1,100
Computer Expense	2,500	1,800	2,400	4,000	5,100	4,000	-	19,800	147,700	167,500
FSS	4,500	12,900	2,500	-	-	1,000	-	20,900	-	20,900
Stationary, Copier, Office Supplies	100	-	-	-	-	-	-	100	900	1,000
Publications, Dues and Fees	200	1,150	500	1,800	700	1,100	-	5,450	58,800	64,250
Office Equipment	-	-	-	-	-	500	-	500	1,200	1,700
Postage	200	1,700	600	800	600	550	-	4,450	2,700	7,150
Printing Expense	-	-	-	-	-	-	-	-	600	600
Telephone	1,100	4,300	2,000	4,300	4,200	4,300	-	20,200	11,700	31,900
Consultants	-	1,000	400	700	500	600	-	3,200	57,000	60,200
Office Rent	-	-	-	-	-	-	-	-	152,500	152,500
Office Expense	-	1,600	600	1,800	500	-	6,600	11,100	26,700	37,800
Software	-	-	-	-	-	-	-	-	1,000	1,000
Legal Expense	200	500	300	500	100	1,000	-	2,600	38,400	41,000
Travel	400	450	200	200	1,000	650	-	2,900	19,100	22,000
Employee Appreciation Costs	-	-	-	-	-	-	-	-	1,500	1,500
Background Checks	-	-	-	-	-	-	-	-	600	600
Other	900	7,300	1,700	2,500	3,000	2,700	-	18,100	60,600	78,700
Staff Training	600	5,500	1,300	4,000	4,300	3,600	10,300	29,600	37,500	67,100
<b>Total Administrative</b>	<b>77,200</b>	<b>382,700</b>	<b>105,600</b>	<b>312,500</b>	<b>241,300</b>	<b>213,000</b>	<b>241,500</b>	<b>1,573,800</b>	<b>2,482,700</b>	<b>4,056,500</b>
<b>Asset Management Fee</b>	<b>3,400</b>	<b>23,500</b>	<b>6,300</b>	<b>18,000</b>	<b>10,800</b>	<b>11,300</b>	<b>-</b>	<b>73,300</b>	<b>-</b>	<b>73,300</b>
<b>Tenant Services</b>										
Tenant Services Salaries	1,400	16,600	4,500	17,600	4,400	10,700	-	55,200	-	55,200
Relocation Costs	-	1,000	-	700	-	-	-	1,700	-	1,700
Tenant Services Fringe	1,200	13,100	3,600	14,000	3,900	9,000	-	44,800	-	44,800
Recreation and Contract	-	1,100	3,300	-	200	-	-	4,600	-	4,600
Resident Participation Fund	800	5,700	1,200	3,600	1,900	2,400	-	15,600	-	15,600



Tenant Services Other	-	-	-	-	100	-	-	100	-	100
<b>Total Tenant Services</b>	<b>3,400</b>	<b>37,500</b>	<b>12,600</b>	<b>35,900</b>	<b>10,500</b>	<b>22,100</b>	<b>-</b>	<b>122,000</b>	<b>-</b>	<b>122,000</b>
<b>Utilities</b>										
Water	9,900	35,000	9,100	15,500	18,400	17,300	-	105,200	4,000	109,200
Electricity	1,900	2,200	2,700	62,500	9,400	11,300	-	90,000	24,000	114,000
Gas	-	-	-	39,500	11,500	1,200	-	52,200	9,000	61,200
Sewer	21,000	99,000	15,800	29,300	40,800	24,800	-	230,700	4,000	234,700
Garbage	12,600	58,200	19,400	21,000	23,300	22,700	-	157,200	2,000	159,200
<b>Total Utilities</b>	<b>45,400</b>	<b>194,400</b>	<b>47,000</b>	<b>167,800</b>	<b>103,400</b>	<b>77,300</b>	<b>-</b>	<b>635,300</b>	<b>43,000</b>	<b>678,300</b>
<b>Maintenance</b>										
Maintenance Salaries	19,600	111,800	43,600	73,400	39,400	58,600	-	346,400	326,200	672,600
Materials and Other	6,000	54,400	11,700	34,000	15,600	15,400	-	137,100	17,600	154,700
Boilers	-	-	3,300	-	6,000	-	-	9,300	-	9,300
Elevators	-	-	-	7,800	5,000	5,000	-	17,800	-	17,800
Fee for Service	12,000	132,500	51,300	35,000	53,000	7,500	-	291,300	-	291,300
Flooring	-	-	-	-	-	-	-	-	-	-
Grounds Maintenance	-	7,600	5,000	8,000	18,500	13,800	-	52,900	-	52,900
Janitorial Service	600	-	1,200	13,000	1,000	12,800	-	28,600	500	29,100
Pest Control	-	5,100	4,400	4,000	2,900	6,000	-	22,400	-	22,400
Vacate Expenses	2,500	21,200	7,800	12,000	13,500	9,000	-	66,000	-	66,000
Vehicle and Maintenance Expense	500	7,200	2,100	3,000	3,600	5,300	-	21,700	2,000	23,700
Miscellaneous Contract Expenses	6,000	51,700	12,700	10,000	18,200	11,000	-	109,600	92,600	202,200
Maintenance Fringe	14,600	94,200	39,600	51,700	30,300	32,200	-	262,600	184,800	447,400
<b>Total Maintenance</b>	<b>61,800</b>	<b>485,700</b>	<b>182,700</b>	<b>251,900</b>	<b>207,000</b>	<b>176,600</b>	<b>-</b>	<b>1,365,700</b>	<b>623,700</b>	<b>1,989,400</b>
<b>Protective Services</b>										
Protective Services Salaries	-	6,000	-	-	-	-	-	6,000	-	6,000
Protectives Services Fringe	-	1,200	-	-	-	-	-	1,200	-	1,200
<b>Total Protective Services</b>	<b>-</b>	<b>7,200</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>7,200</b>	<b>-</b>	<b>7,200</b>
<b>Insurance</b>										
Property Insurance	5,200	29,000	10,500	18,100	12,200	13,400	-	88,400	21,900	110,300
<b>Total Insurance</b>	<b>5,200</b>	<b>29,000</b>	<b>10,500</b>	<b>18,100</b>	<b>12,200</b>	<b>13,400</b>	<b>-</b>	<b>88,400</b>	<b>21,900</b>	<b>110,300</b>
<b>General</b>										
Other General Expenses	-	3,600	20,300	38,000	-	-	-	61,900	-	61,900
Payments in Lieu of Taxes	5,300	52,100	16,500	30,100	16,700	18,500	-	139,200	10,000	149,200
Bad Debt - Tenant Rents	3,000	20,000	-	-	-	-	-	23,000	-	23,000
<b>Total General</b>	<b>8,300</b>	<b>75,700</b>	<b>36,800</b>	<b>68,100</b>	<b>16,700</b>	<b>18,500</b>	<b>-</b>	<b>224,100</b>	<b>10,000</b>	<b>234,100</b>
<b>Interest Expense</b>	<b>10,000</b>	<b>39,200</b>	<b>10,000</b>	<b>31,500</b>	<b>25,300</b>	<b>17,300</b>	<b>-</b>	<b>133,300</b>	<b>-</b>	<b>133,300</b>
<b>Total Operating Expenses</b>	<b>214,700</b>	<b>1,274,900</b>	<b>411,500</b>	<b>903,800</b>	<b>627,200</b>	<b>549,500</b>	<b>241,500</b>	<b>4,223,100</b>	<b>3,181,300</b>	<b>7,404,400</b>
<b>Total Expenses</b>	<b>214,700</b>	<b>1,274,900</b>	<b>411,500</b>	<b>903,800</b>	<b>627,200</b>	<b>549,500</b>	<b>241,500</b>	<b>4,223,100</b>	<b>3,181,300</b>	<b>7,404,400</b>
<b>Net Income</b>	<b>10,300</b>	<b>75,700</b>	<b>1,700</b>	<b>11,500</b>	<b>55,000</b>	<b>20,400</b>	<b>1,180,500</b>	<b>1,355,100</b>	<b>494,500</b>	<b>1,849,600</b>
<b>Other Financing Sources / Uses</b>										
Repayment of Borrowings	(9,900)	(46,900)	-	-	(33,200)	(23,000)	-	(113,000)	(675,000)	(788,000)
Inter Project Cash Transfers -IN	-	-	-	-	-	-	-	-	326,900	326,900
Operating Reserve	-	-	-	-	-	1,700	-	1,700	-	1,700
Replacement Reserve	-	-	-	-	-	-	-	-	(40,000)	(40,000)
Capital Outlay	-	-	-	-	-	-	(900,000)	(900,000)	-	(900,000)
<b>Total Other Financing Sources</b>	<b>(9,900)</b>	<b>(46,900)</b>	<b>-</b>	<b>-</b>	<b>(33,200)</b>	<b>(21,300)</b>	<b>(900,000)</b>	<b>(1,011,300)</b>	<b>(388,100)</b>	<b>(1,399,400)</b>
<b>Excess (Deficiency) of Total Revenue Over (Under)</b>										
<b>Total Expenses</b>	<b>400</b>	<b>28,800</b>	<b>1,700</b>	<b>11,500</b>	<b>21,800</b>	<b>(900)</b>	<b>280,500</b>	<b>343,800</b>	<b>106,400</b>	<b>450,200</b>

PHA Board Resolution  
Approving Operating Budget

U.S. Department of Housing  
and Urban Development  
Office of Public and Indian Housing -  
Real Estate Assessment Center (PIH-REAC)

OMB No. 2577-0026  
(exp. 07/31/2019)

**Public reporting burden for** this collection of information is estimated to average **10 minutes per response**, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB control number.

This information is required by Section 6(c)(4) of the U.S. Housing Act of 1937. The information is the operating budget for the low-income public housing program and provides a summary of the proposed/budgeted receipts and expenditures, approval of budgeted receipts and expenditures, and justification of certain specified amounts. HUD reviews the information to determine if the operating plan adopted by the public housing agency (PHA) and the amounts are reasonable, and that the PHA is in compliance with procedures prescribed by HUD. Responses are required to obtain benefits. This information does not lend itself to confidentiality.

PHA Name: \*\*\*\*\*PHA Code:

PHA Fiscal Year Beginning: \*\*\*\*\*Board Resolution Number:

Acting on behalf of the Board of Commissioners of the above-named PHA as its Chairperson, I make the following certifications and agreement to the Department of Housing and Urban Development (HUD) regarding the Board's approval of (check one or more as applicable):

DATE

- ☐ Operating Budget approved by Board resolution on:
- ☐ Operating Budget submitted to HUD, if applicable, on:
- ☐ Operating Budget revision approved by Board resolution on:
- ☐ Operating Budget revision submitted to HUD, if applicable, on:

I certify on behalf of the above-named PHA that:

1. All statutory and regulatory requirements have been met;
2. The PHA has sufficient operating reserves to meet the working capital needs of its developments;
3. Proposed budget expenditure are necessary in the efficient and economical operation of the housing for the purpose of serving low-income residents;
4. The budget indicates a source of funds adequate to cover all proposed expenditures;
5. The PHA will comply with the wage rate requirement under 24 CFR 968.110(c) and (f); and
6. The PHA will comply with the requirements for access to records and audits under 24 CFR 968.110(i).

I hereby certify that all the information stated within, as well as any information provided in the accompaniment herewith, if applicable, is true and accurate.

**Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012.31, U.S.C. 3729 and 3802)

Print Board Chairperson's Name:	Signature:	Date:
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# BOARD OF COMMISSIONERS AGENDA ITEM

**BOARD MEETING DATE:** 09/30/2020

**AGENDA TITLE:** In the Matter of Approving the Submission of the PHA FY21 Annual Plan

**DEPARTMENT:** Supportive Housing Division

**CONTACT :** Wakan Alferes

**EXT:** 2508

**PRESENTER:** Wakan Alferes

**EXT:** 2508

**ESTIMATED TIME :** 5 min

- ☒ **ORDER/RESOLUTION**
- ☐ **PUBLIC HEARING/ORDINANCE**
- ☐ **DISCUSSION OR PRESENTATION (NO ACTION)**
- ☐ **APPOINTMENTS**
- ☐ **REPORT**
- ☐ **PUBLIC COMMENT ANTICIPATED**

**Approval Signature**

**EXECUTIVE DIRECTOR:**

A handwritten signature in black ink, appearing to be "JAF", is written over a horizontal line.

**DATE:** 9/22/20

**LEGAL STAFF :**

**DATE:**

**MANAGEMENT STAFF:**

**DATE:**



## **HOMES FOR GOOD MEMORANDUM**

**TO:** Homes for Good Board of Commissioners

**FROM:** Jacob Fox, Executive Director

**AGENDA ITEM TITLE:** ORDER 20-30-09-03H/ In the Matter of Approving the Submission of the PHA FY2021 Annual Plan

**AGENDA DATE:** September 30, 2020

### **I MOTION**

It is moved that the order be adopted approving the submission of the Agency Annual Plan for the fiscal year beginning October 1, 2020.

### **II ISSUE**

The Annual Agency Plan requires Board approval and certification that the Agency has complied with the applicable requirements listed on the certification form.

### **III DISCUSSION**

#### **A. Background**

The Agency is required by Section 511 of the Quality Housing and Work Responsibility Act of 1998 (and ensuing HUD requirements) to submit an Annual Plan to HUD. This year the Agency is required to submit an Annual Plan covering FY 2021, which begins October 1, 2020 and ends September 30, 2021.

As in previous years, the focus of the Plans is to identify the programs and services provided under the Public Housing (PH) and Section 8 Tenant Based Assistance Programs and to allow public access and comment on those programs and services. The Work Responsibility Act requires that housing authorities work with their Public Housing Resident Advisory Boards (RAB) on the planning and development of the Plans. In order to meet this requirement, the Agency began meeting with the RAB in January 2020.

The Agency submitted the Plan to the Board of Commissioners in August and the Board chose to not vote on the matter at that time, requesting staff seek and include additional resident input. Due to COVID-19, HUD has implemented various regulatory waivers including modifications to the process for seeking public comment and the required timeline for the Annual Plan submission. Board members discussed the importance of residents having an opportunity to provide comment prior to approval of the plan and the need to make materials available in a variety of ways regardless of regulatory requirements.

Since the August meeting, Agency staff have printed and posted an overview of plan changes to all resident doors with a dedicated phone line to provide comment as well as emailing materials to 2,020 HCV participants (497 opened the email) and 550 Public and Assisted Housing residents (176 opened the email). We also posted information to our social media account, with a total of 334 impressions. Through this process we have not received any additional public comment, although additional RAB comments have been added to the plan to capture feedback provided by that group.

The Agency is again submitting the Plan to the Homes for Good Board of Commissioners for approval, followed by electronic submission to HUD no later than October 18, 2020.

B. Analysis

Homes for Good continues to maintain high performer status with HUD and has complied with applicable Annual Plan requirements for high performers. The Annual Plan due date to HUD is later than usual due to the Agency's acceptance of HUD's **COVID-19 Waiver PHA 5-Year and Annual Plan Submission Dates, Significant Amendment Requirements**.

C. Recommendation

Approval of the proposed motion.

#### IV IMPLEMENTATION/FOLLOW-UP

A copy of the PHA Certifications of Compliance with PHA Plans and Related Regulations form must be filled out and signed by the Chair.

Upon approval by the Board, the Executive Director will direct staff to submit the Annual Plan to HUD.

#### V ATTACHMENTS

A blank copy of the Certification of Compliance with PHA Plans and Related Regulations is attached.

A copy of the Certification by State or Local Official of PHA Plans Consistency with the Consolidated Plan, signed by the Eugene city manager, is attached.

C.3 Resident Advisory Board Comments (RAB)

<b>Certifications of Compliance with PHA Plans and Related Regulations (Standard, Troubled, HCV-Only, and High Performer PHAs)</b>	<b>U.S. Department of Housing and Urban Development</b> Office of Public and Indian Housing <b>OMB No. 2577-0226</b> <b>Expires 02/29/2016</b>
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**PHA Certifications of Compliance with the PHA Plan and Related Regulations including  
Required Civil Rights Certifications**

*Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairman or other authorized PHA official if there is no Board of Commissioners, I approve the submission of the \_\_\_ 5-Year and/or \_\_\_ Annual PHA Plan for the PHA fiscal year beginning \_\_\_\_, hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:*

1. The Plan is consistent with the applicable comprehensive housing affordability strategy (or any plan incorporating such strategy) for the jurisdiction in which the PHA is located.
2. The Plan contains a certification by the appropriate State or local officials that the Plan is consistent with the applicable Consolidated Plan, which includes a certification that requires the preparation of an Analysis of Impediments to Fair Housing Choice, for the PHA's jurisdiction and a description of the manner in which the PHA Plan is consistent with the applicable Consolidated Plan.
3. The PHA has established a Resident Advisory Board or Boards, the membership of which represents the residents assisted by the PHA, consulted with this Resident Advisory Board or Boards in developing the Plan, including any changes or revisions to the policies and programs identified in the Plan before they were implemented, and considered the recommendations of the RAB (24 CFR 903.13). The PHA has included in the Plan submission a copy of the recommendations made by the Resident Advisory Board or Boards and a description of the manner in which the Plan addresses these recommendations.
4. The PHA made the proposed Plan and all information relevant to the public hearing available for public inspection at least 45 days before the hearing, published a notice that a hearing would be held and conducted a hearing to discuss the Plan and invited public comment.
5. The PHA certifies that it will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990.
6. The PHA will affirmatively further fair housing by examining their programs or proposed programs, identifying any impediments to fair housing choice within those programs, addressing those impediments in a reasonable fashion in view of the resources available and work with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement and by maintaining records reflecting these analyses and actions.
7. For PHA Plans that includes a policy for site based waiting lists:
  - The PHA regularly submits required data to HUD's 50058 PIC/IMS Module in an accurate, complete and timely manner (as specified in PIH Notice 2010-25);
  - The system of site-based waiting lists provides for full disclosure to each applicant in the selection of the development in which to reside, including basic information about available sites; and an estimate of the period of time the applicant would likely have to wait to be admitted to units of different sizes and types at each site;
  - Adoption of a site-based waiting list would not violate any court order or settlement agreement or be inconsistent with a pending complaint brought by HUD;
  - The PHA shall take reasonable measures to assure that such a waiting list is consistent with affirmatively furthering fair housing;
  - The PHA provides for review of its site-based waiting list policy to determine if it is consistent with civil rights laws and certifications, as specified in 24 CFR part 903.7(c)(1).
8. The PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
9. The PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.
10. The PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low-or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 135.
11. The PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.



12. The PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
13. The PHA will provide the responsible entity or HUD any documentation that the responsible entity or HUD needs to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58 or Part 50, respectively.
14. With respect to public housing the PHA will comply with Davis-Bacon or HUD determined wage rate requirements under Section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.
15. The PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.
16. The PHA will comply with the Lead-Based Paint Poisoning Prevention Act, the Residential Lead-Based Paint Hazard Reduction Act of 1992, and 24 CFR Part 35.
17. The PHA will comply with the policies, guidelines, and requirements of OMB Circular No. A-87 (Cost Principles for State, Local and Indian Tribal Governments), 2 CFR Part 225, and 24 CFR Part 85 (Administrative Requirements for Grants and Cooperative Agreements to State, Local and Federally Recognized Indian Tribal Governments).
18. The PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the regulations and included in its Plan.
19. All attachments to the Plan have been and will continue to be available at all times and all locations that the PHA Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the PHA in its PHA Plan and will continue to be made available at least at the primary business office of the PHA.
22. The PHA certifies that it is in compliance with applicable Federal statutory and regulatory requirements, including the Declaration of Trust(s).

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PHA Name

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PHA Number/HA Code

\_\_\_\_\_ Annual PHA Plan for Fiscal Year 20\_\_\_\_\_

\_\_\_\_\_ 5-Year PHA Plan for Fiscal Years 20\_\_\_\_\_ - 20\_\_\_\_\_

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I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. **Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802).

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Name of Authorized Official

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Title

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Signature

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Date

# MEMORANDUM

**Date:** August 4, 2020

**To:** Sarah Medary, City Manager

**From:** Denny Braud, Planning and Development Executive Director

  
DB

**Subject:** SIGNATURE NEEDED: HOMES FOR GOOD ANNUAL CERTIFICATION OF CONSISTENCY WITH THE HUD 2020 EUGENE-SPRINGFIELD CONSOLIDATED PLAN

Please review and sign the attached Annual Certification of Consistency with the HUD Consolidated Plan form prepared by Homes for Good Housing Agency to certify that their Public Housing Authority (PHA) Plan for FY21 is consistent with the 2020 Eugene-Springfield Consolidated Plan. Staff has confirmed that the accuracy of the information contained in the plans are consistent with one another.

For more information on these documents please contact Nicole Stehlar at [nstehlar@eugene-or.gov](mailto:nstehlar@eugene-or.gov) or 541-682-5309.

*Attachments*

## E-ROUTING:

1.   
NS

Nicole Stehlar – please initial

2.   
AF

Michael Kinnison – please initial

3.   
DB

Denny Braud – please initial

4. ☐

Sarah Medary, City Manager – please sign

5. ☐

Dana Bernard – PDD/CD, log request

**Certification by State or Local  
Official of PHA Plans Consistency  
with the Consolidated Plan or  
State Consolidated Plan  
(All PHAs)**

U. S Department of Housing and Urban Development  
Office of Public and Indian Housing  
OMB No. 2577-0226  
Expires 2/29/2016

**Certification by State or Local Official of PHA Plans  
Consistency with the Consolidated Plan or State Consolidated Plan**

I, Sarah Medary, the City Manager  
*Official's Name* *Official's Title*

certify that the 5-Year PHA Plan and/or Annual PHA Plan of the

Homes for Good Housing Agency

*PHA Name*

is consistent with the Consolidated Plan or State Consolidated Plan and the Analysis of  
Impediments (AI) to Fair Housing Choice of the

City of Eugene

*Local Jurisdiction Name*

pursuant to 24 CFR Part 91.

Provide a description of how the PHA Plan is consistent with the Consolidated Plan or State  
Consolidated Plan and the AI.

The PHA Annual Plan preserves affordable housing in a way that is consistent with the goals of the  
2020-2025 Eugene-Springfield Consolidated Plan.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will  
prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

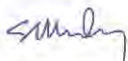
Name of Authorized Official

Sarah Medary

Title

City Manager

Signature



Date

08/05/2020

  
NS

  
AF

  
DB

<b>Streamlined Annual PHA Plan</b> <i>(High Performer PHAs)</i>	<b>U.S. Department of Housing and Urban Development Office of Public and Indian Housing</b>	<b>OMB No. 2577-0226 Expires: 02/29/2016</b>
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**Purpose.** The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families

**Applicability.** Form HUD-50075-HP is to be completed annually by **High Performing PHAs**. PHAs that meet the definition of a Standard PHA, Troubled PHA, HCV-Only PHA, Small PHA, or Qualified PHA do not need to submit this form.

**Definitions.**

- (1) **High-Performer PHA** – A PHA that owns or manages more than 550 combined public housing units and housing choice vouchers, and was designated as a high performer on both of the most recent Public Housing Assessment System (PHAS) and Section Eight Management Assessment Program (SEMAP) assessments.
- (2) **Small PHA** - A PHA that is not designated as PHAS or SEMAP troubled, or at risk of being designated as troubled, and that owns or manages less than 250 public housing units and any number of vouchers where the total combined units exceeds 550.
- (3) **Housing Choice Voucher (HCV) Only PHA** - A PHA that administers more than 550 HCVs, was not designated as troubled in its most recent SEMAP assessment, and does not own or manage public housing.
- (4) **Standard PHA** - A PHA that owns or manages 250 or more public housing units and any number of vouchers where the total combined units exceeds 550, and that was designated as a standard performer in the most recent PHAS or SEMAP assessments.
- (5) **Troubled PHA** - A PHA that achieves an overall PHAS or SEMAP score of less than 60 percent.
- (6) **Qualified PHA** - A PHA with 550 or fewer public housing dwelling units and/or housing choice vouchers combined, and is not PHAS or SEMAP troubled.

A.	PHA Information.																															
A.1	<p>PHA Name: <u>Homes for Good Housing Agency</u>      PHA Code: <u>OR006</u></p> <p>PHA Type: <input type="checkbox"/> Small <input checked="" type="checkbox"/> High Performer</p> <p>PHA Plan for Fiscal Year Beginning: (MM/YYYY): <u>10/2020</u></p> <p>PHA Inventory (Based on Annual Contributions Contract (ACC) units at time of FY beginning, above)</p> <p>Number of Public Housing (PH) Units <u>595</u>      Number of Housing Choice Vouchers (HCVs) <u>3098</u></p> <p>Total Combined <u>3693</u></p> <p>PHA Plan Submission Type: <input checked="" type="checkbox"/> Annual Submission      <input type="checkbox"/> Revised Annual Submission</p> <p><b>Availability of Information.</b> In addition to the items listed in this form, PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. Additionally, the PHA must provide information on how the public may reasonably obtain additional information of the PHA policies contained in the standard Annual Plan, but excluded from their streamlined submissions. At a minimum, PHAs must post PHA Plans, including updates, at each Asset Management Project (AMP) and main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official website. PHAs are also encouraged to provide each resident council a copy of their PHA Plans.</p> <p><input type="checkbox"/> <b>PHA Consortia:</b> (Check box if submitting a Joint PHA Plan and complete table below)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th rowspan="2">Participating PHAs</th> <th rowspan="2">PHA Code</th> <th rowspan="2">Program(s) in the Consortia</th> <th rowspan="2">Program(s) not in the Consortia</th> <th colspan="2">No. of Units in Each Program</th> </tr> <tr> <th>PH</th> <th>HCV</th> </tr> </thead> <tbody> <tr> <td>Lead PHA:</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td>The PHA Annual Plan</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>						Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program		PH	HCV	Lead PHA:							The PHA Annual Plan										
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	The PHA Annual Plan																															

<b>B.</b>	<b>Annual Plan Elements</b>
<b>B.1</b>	<p><b>Revision of PHA Plan Elements.</b></p> <p>(a) Have the following PHA Plan elements been revised by the PHA since its last <b>Annual PHA Plan</b> submission? Y N</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Statement of Housing Needs and Strategy for Addressing Housing Needs.  <input checked="" type="checkbox"/> <input type="checkbox"/> Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.  <input checked="" type="checkbox"/> <input type="checkbox"/> Financial Resources.  <input type="checkbox"/> <input checked="" type="checkbox"/> Rent Determination.  <input type="checkbox"/> <input checked="" type="checkbox"/> Homeownership Programs.  <input type="checkbox"/> <input checked="" type="checkbox"/> Safety and Crime Prevention.  <input checked="" type="checkbox"/> <input type="checkbox"/> Pet Policy.  <input type="checkbox"/> <input checked="" type="checkbox"/> Substantial Deviation.  <input type="checkbox"/> <input checked="" type="checkbox"/> Significant Amendment/Modification</p> <p>(b) The PHA must submit its Deconcentration Policy for Field Office Review.</p> <p>(c) If the PHA answered yes for any element, describe the revisions for each element below:  See Attachment B.1 Revision of PHA Plan Elements  See ACOP Key Modifications  See Administrative Plan Key Modifications</p>
<b>B.2</b>	<p><b>New Activities.</b></p> <p>(a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year? Y N</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Hope VI or Choice Neighborhoods.  <input type="checkbox"/> <input checked="" type="checkbox"/> Mixed Finance Modernization or Development.  <input checked="" type="checkbox"/> <input type="checkbox"/> Demolition and/or Disposition.  <input type="checkbox"/> <input checked="" type="checkbox"/> Conversion of Public Housing to Tenant Based Assistance.  <input checked="" type="checkbox"/> <input type="checkbox"/> Conversion of Public Housing to Project-Based Assistance under RAD.  <input checked="" type="checkbox"/> <input type="checkbox"/> Project Based Vouchers.  <input type="checkbox"/> <input checked="" type="checkbox"/> Units with Approved Vacancies for Modernization.  <input type="checkbox"/> <input checked="" type="checkbox"/> Other Capital Grant Programs (i.e., Capital Fund Community Facilities Grants or Emergency Safety and Security Grants).</p> <p>(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/disposition approval process. If using Project-Based Vouchers (PBVs), provide the projected number of project based units and general locations, and describe how project basing would be consistent with the PHA Plan.</p> <p>See Attachment B.2 New Activities</p>
<b>B.3</b>	<p><b>Progress Report.</b></p> <p>Provide a description of the PHA's progress in meeting its Mission and Goals described in the PHA 5-Year Plan.</p> <p>See Attachment B.3 Progress Report</p>



B.4.	<p><b>Most Recent Fiscal Year Audit.</b></p> <p>(a) Were there any findings in the most recent FY Audit?</p> <p>Y   N  <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>(b) If yes, please describe:</p>
<p><b>Other Document and/or Certification Requirements.</b></p>	
C.1	<p><b>Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan</b></p> <p><u>Form 50077-ST-HCV-HP, Certification of Compliance with PHA Plans and Related Regulations</u>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>
C.2	<p><b>Civil Rights Certification.</b></p> <p><u>Form 50077-ST-HCV-HP, Certification of Compliance with PHA Plans and Related Regulations</u>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>
C.3	<p><b>Resident Advisory Board (RAB) Comments.</b></p> <p>(a) Did the RAB(s) provide comments to the PHA Plan?</p> <p>Y   N  <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations.</p> <p>See Attachment C.3 Resident Advisory Board (RAB) Comments</p>
C.4	<p><b>Certification by State or Local Officials.</b></p> <p><u>Form HUD 50077-SL, Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan</u>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>
<p><b>D   Statement of Capital Improvements.</b> Required in all years for all PHAs completing this form that administer public housing and receive funding from the Capital Fund Program (CFP).</p>	
D.1	<p><b>Capital Improvements.</b> Include a reference here to the most recent HUD-approved 5-Year Action Plan (HUD-50075.2) and the date that it was approved by HUD.</p> <p>See HUD Form 50075.2 approved by HUD on 07/09/2019</p>



# Instructions for Preparation of Form HUD-50075-HP

## Annual Plan for High Performing PHAs

### A. PHA Information. All PHAs must complete this section.

- A.1 Include the full PHA Name, PHA Code, PHA Type, PHA Fiscal Year Beginning (MM/YYYY), PHA Inventory, Number of Public Housing Units and or Housing Choice Vouchers (HCVs), PHA Plan Submission Type, and the Availability of Information, specific location(s) of all information relevant to the public hearing and proposed PHA Plan. ([24 CFR §903.23\(4\)\(e\)](#))

PHA Consortia: Check box if submitting a Joint PHA Plan and complete the table. ([24 CFR §943.128\(a\)](#))

### B. Annual Plan.

#### B.1 Revision of PHA Plan Elements. PHAs must:

Identify specifically which plan elements listed below that have been revised by the PHA. To specify which elements have been revised, mark the “yes” box. If an element has not been revised, mark “no.”

☐ **Statement of Housing Needs and Strategy for Addressing Housing Needs.** Provide a statement addressing the housing needs of low-income, very low-income and extremely low-income families and a brief description of the PHA’s strategy for addressing the housing needs of families who reside in the jurisdiction served by the PHA. The statement must identify the housing needs of (i) families with incomes below 30 percent of area median income (extremely low-income), (ii) elderly families and families with disabilities, and (iii) households of various races and ethnic groups residing in the jurisdiction or on the waiting list based on information provided by the applicable Consolidated Plan, information provided by HUD, and other generally available data. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. For years in which the PHA’s 5-Year PHA Plan is also due, this information must be included only to the extent it pertains to the housing needs of families that are on the PHA’s public housing and Section 8 tenant-based assistance waiting lists. [24 CFR §903.7\(a\)\(1\)](#) and [24 CFR §903.12\(b\)](#). Provide a description of the PHA’s strategy for addressing the housing needs of families in the jurisdiction and on the waiting list in the upcoming year. For years in which the PHA’s 5-Year PHA Plan is also due, this information must be included only to the extent it pertains to the housing needs of families that are on the PHA’s public housing and Section 8 tenant-based assistance waiting lists. [24 CFR §903.7\(a\)\(2\)\(ii\)](#) and [24 CFR §903.12\(b\)](#).

☐ **Deconcentration and Other Policies that Govern Eligibility, Selection and Admissions.** Describe the PHA’s admissions policy for deconcentration of poverty and income mixing of lower-income families in public housing. The Deconcentration Policy must describe the PHA’s policy for bringing higher income tenants into lower income developments and lower income tenants into higher income developments. The deconcentration requirements apply to general occupancy and family public housing developments. Refer to [24 CFR §903.2\(b\)\(2\)](#) for developments not subject to deconcentration of poverty and income mixing requirements. [24 CFR §903.7\(b\)](#). Describe the PHA’s procedures for maintaining waiting lists for admission to public housing and address any site-based waiting lists. [24 CFR §903.7\(b\)](#). A statement of the PHA’s policies that govern resident or tenant eligibility, selection and admission including admission preferences for both public housing and HCV. ([24 CFR §903.7\(b\)](#)) Describe the unit assignment policies for public housing. [24 CFR §903.7\(b\)](#)

☐ **Financial Resources.** A statement of financial resources, including a listing by general categories, of the PHA’s anticipated resources, such as PHA operating, capital and other anticipated Federal resources available to the PHA, as well as tenant rents and other income available to support public housing or tenant-based assistance. The statement also should include the non-Federal sources of funds supporting each Federal program, and state the planned use for the resources. ([24 CFR §903.7\(c\)](#))

☐ **Rent Determination.** A statement of the policies of the PHA governing rents charged for public housing and HCV dwelling units, including applicable public housing flat rents, minimum rents, voucher family rent contributions, and payment standard policies. ([24 CFR §903.7\(d\)](#))

☐ **Homeownership Programs.** A description of any homeownership programs (including project number and unit count) administered by the agency or for which the PHA has applied or will apply for approval. For years in which the PHA’s 5-Year PHA Plan is also due, this information must be included only to the extent that the PHA participates in homeownership programs under section 8(y) of the 1937 Act. ([24 CFR §903.7\(k\)](#)) and [24 CFR §903.12\(b\)](#).

☐ **Safety and Crime Prevention (VAWA).** A description of: **1)** Any activities, services, or programs provided or offered by an agency, either directly or in partnership with other service providers, to child or adult victims of domestic violence, dating violence, sexual assault, or stalking; **2)** Any activities, services, or programs provided or offered by a PHA that helps child and adult victims of domestic violence, dating violence, sexual assault, or stalking, to obtain or maintain housing; and **3)** Any activities, services, or programs provided or offered by a public housing agency to prevent domestic violence, dating violence, sexual assault, and stalking, or to enhance victim safety in assisted families. ([24 CFR §903.7\(m\)\(5\)](#))

☐ **Pet Policy.** Describe the PHA’s policies and requirements pertaining to the ownership of pets in public housing. ([24 CFR §903.7\(n\)](#))

☐ **Substantial Deviation.** PHA must provide its criteria for determining a “substantial deviation” to its 5-Year Plan. ([24 CFR §903.7\(r\)\(2\)\(i\)](#))

☐ **Significant Amendment/Modification.** PHA must provide its criteria for determining a “Significant Amendment or Modification” to its 5-Year and Annual Plan. Should the PHA fail to define ‘significant amendment/modification’, HUD will consider the following to be ‘significant amendments or modifications’: a) changes to rent or admissions policies or organization of the waiting list; b) additions of non-emergency public housing CFP work items (items not included in the current CFP Annual Statement or CFP 5-Year Action Plan); or c) any change with regard to demolition or disposition, designation, homeownership programs or conversion activities. See guidance on HUD’s website at: [Notice PIH 1999-51](#). ([24 CFR §903.7\(r\)\(2\)\(ii\)](#))

If any boxes are marked “yes”, describe the revision(s) to those element(s) in the space provided.

PHAs must submit a Deconcentration Policy for Field Office review. For additional guidance on what a PHA must do to deconcentrate poverty in its development and comply with fair housing requirements, see [24 CFR 903.2](#). ([24 CFR §903.23\(b\)](#))



**B.2 New Activities.** If the PHA intends to undertake any new activities related to these elements or discretionary policies in the current Fiscal Year, mark “yes” for those elements, and describe the activities to be undertaken in the space provided. If the PHA does not plan to undertake these activities, mark “no.”

☐ **Hope VI.** 1) A description of any housing (including project name, number (if known) and unit count) for which the PHA will apply for HOPE VI; and 2) A timetable for the submission of applications or proposals. The application and approval process for Hope VI is a separate process. See guidance on HUD’s website at: <http://www.hud.gov/offices/pih/programs/ph/hope6/index.cfm>. (Notice PIH 2010-30)

☐ **Mixed Finance Modernization or Development.** 1) A description of any housing (including name, project number (if known) and unit count) for which the PHA will apply for Mixed Finance Modernization or Development; and 2) A timetable for the submission of applications or proposals. The application and approval process for Mixed Finance Modernization or Development is a separate process. See guidance on HUD’s website at:

<http://www.hud.gov/offices/pih/programs/ph/hope6/index.cfm>. (Notice PIH 2010-30)

☐ **Demolition and/or Disposition.** Describe any public housing projects owned by the PHA and subject to ACCs (including name, project number and unit numbers [or addresses]), and the number of affected units along with their sizes and accessibility features) for which the PHA will apply or is currently pending for demolition or disposition; and (2) A timetable for the demolition or disposition. This statement must be submitted to the extent that approved and/or pending demolition and/or disposition has changed. The application and approval process for demolition and/or disposition is a separate process. See guidance on HUD’s website at: [http://www.hud.gov/offices/pih/centers/sac/demo\\_dispo/index.cfm](http://www.hud.gov/offices/pih/centers/sac/demo_dispo/index.cfm). (24 CFR §903.7(h))

☐ **Conversion of Public Housing.** Describe any public housing building(s) (including project number and unit count) owned by the PHA that the PHA is required to convert or plans to voluntarily convert to tenant-based assistance; 2) An analysis of the projects or buildings required to be converted; and 3) A statement of the amount of assistance received to be used for rental assistance or other housing assistance in connection with such conversion. See guidance on HUD’s website at: <http://www.hud.gov/offices/pih/centers/sac/conversion.cfm>. (24 CFR §903.7(j))

☐ **Project-Based Vouchers.** Describe any plans to use HCVs for new project-based vouchers. (24 CFR §983.57(b)(1)) If using project-based vouchers, provide the projected number of project-based units and general locations, and describe how project-basing would be consistent with the PHA Plan.

☐ **Other Capital Grant Programs** (i.e., Capital Fund Community Facilities Grants or Emergency Safety and Security Grants).

**B.3 Progress Report.** For all Annual Plans following submission of the first Annual Plan, a PHA must include a brief statement of the PHA’s progress in meeting the mission and goals described in the 5-Year PHA Plan. (24 CFR §903.7(r)(1))

**B.4 Most Recent Fiscal Year Audit.** If the results of the most recent fiscal year audit for the PHA included any findings, mark “yes” and describe those findings in the space provided. (24 CFR §903.7(p))

## C. Other Document and/or Certification Requirements

**C.1 Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.** Provide a certification that the following plan elements have been revised, provided to the RAB for comment before implementation, approved by the PHA board, and made available for review and inspection by the public. This requirement is satisfied by completing and submitting form HUD-50077 SM-HP.

**C.2 Civil Rights Certification.** Form HUD-50077 SM-HP, *PHA Certifications of Compliance with the PHA Plans and Related Regulation*, must be submitted by the PHA as an electronic attachment to the PHA Plan. This includes all certifications relating to Civil Rights and related regulations. A PHA will be considered in compliance with the AFFH Certification if: it can document that it examines its programs and proposed programs to identify any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with the local jurisdiction to implement any of the jurisdiction’s initiatives to affirmatively further fair housing; and assures that the annual plan is consistent with any applicable Consolidated Plan for its jurisdiction. (24 CFR §903.7(o))

**C.3 Resident Advisory Board (RAB) comments.** If the RAB provided comments to the annual plan, mark “yes,” submit the comments as an attachment to the Plan and describe the analysis of the comments and the PHA’s decision made on these recommendations. (24 CFR §903.13(c), 24 CFR §903.19)

**C.4 Certification by State or Local Officials.** Form HUD-50077-SL, *Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan*, must be submitted by the PHA as an electronic attachment to the PHA Plan. (24 CFR §903.15)

**D. Statement of Capital Improvements.** PHAs that receive funding from the Capital Fund Program (CFP) must complete this section. (24 CFR 903.7 (g))

**D.1 Capital Improvements.** In order to comply with this requirement, the PHA must reference the most recent HUD approved Capital Fund 5 Year Action Plan. PHAs can reference the form by including the following language in Section C. 8.0 of the PHA Plan Template: “See HUD Form 50075.2 approved by HUD on XX/XX/XXXX.”

This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937, as amended, which introduced the 5-Year and Annual PHA Plan. The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA’s operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA’s mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families.

Public reporting burden for this information collection is estimated to average 16.64 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

**Privacy Act Notice.** The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality.



# **Attachment B.1 Revision of PHA Plan Elements**

## **Statement of Housing Needs and Strategy for Addressing Housing Needs**

The assessment of the impediments to fair housing and fair housing plan strategies, was developed with input from the City of Eugene and the City of Springfield Consolidated plan 2020.

As a first step in this effort Homes for Good conducted an assessment of the impediments and barriers to fair housing as part of its Annual PHA Plan for the Fiscal Year beginning October 1, 2015. This was developed with input during the 2015 City of Eugene and the City of Springfield Consolidated planning process and consultation with many community partners. Its effectiveness is reviewed and measured and annually so that strategies can be adjusted as necessary. Through this work it was found that the two primary issues related to housing need are 1) The lack of affordable units and; 2) Significant barriers to providing equal access to units that are available.

### **Families with incomes below 30 percent of area median income (extremely low-income)**

Unless, otherwise noted, all information below is from the 2020 Eugene-Springfield Consolidated Plan. In Eugene-Springfield 44% of households in the plan area have extremely low, very low or low-moderate income. HUD provided numbers in the Consolidated plan indicated that 14.8% of total households were identified as extremely low income (less than 30% AMI) and 12.3% as low income (between 30 and 50% AMI). More households with children under age 6 (55%) and households with people over age 75 (54%) have low-incomes.

The 2015 Eugene-Springfield Consolidated Plan notes that housing costs in the Eugene-Springfield area have risen sharply over the past 25 years while incomes have risen slowly, forcing many households to pay more for housing than is affordable. Households paying more than 30% of household income are considered to have a 'housing cost burden'. A majority of the renters in Eugene (54%) and Springfield (51%) are considered housing cost burdened, while approximately a third of home-owners are also cost burdened (Eugene – 32%, Springfield – 33%). The elderly makes up 15% of the very low income with a housing cost burden.

Low and very low-income people need increased access to quality affordable rental housing. There is a total of 31,055 low-income renter households in Eugene, and 7,335 in Springfield.

A significant majority of low-income renters experience a housing cost burden, overcrowding, and/or substandard housing conditions (Eugene – 78%, Springfield – 76%).

A significant majority of low-income renters spend more than 30% of their income on housing costs (Eugene – 76%, Springfield – 74%).

A large percentage of low-income renters spend more than 50% of their income on housing costs (Eugene – 51%, Springfield – 34%).

### **Elderly families and families with disabilities**

Elderly make up 13.9% (Renter) and 33.7% (Owner) of the total households with a severe housing cost burden by income. A severe housing cost burden indicates that over 50% of the income is spent on housing.

The Consolidated Plan also indicates that about 14% of population in the Cities of Eugene and Springfield lives with one or more disabilities (29,125 people). Persons with disabilities face a number of barriers related to mobility, transportation, housing, employment, and access to services. In addition, persons with disabilities report many instances of discrimination.

### **Households of various races and ethnic groups residing in the jurisdiction**

In most income categories, there are racial or ethnic groups which are experiencing a disproportionately greater need than the needs of the income category as a whole. For people with very low-incomes (30-50% MFI), American Indian/Alaskan Native and Black/African Americans experience a disproportionately greater need than the general population. For people with low-incomes (50-80% MFI), Black/African Americans experience a

disproportionate level of need. For people with moderate income (80%-100 MFI), Asian, Latino, and Black/African American experience a disproportionately greater need than the income category as a whole. In Eugene and Springfield, there are approximately 13% of the people who identified as a minority race in the 2010 census. There are five census tracts where a higher percentage (17%- 23%) of people identified as a minority race.

Hispanic households experience a disproportionately greater incidence of housing cost burden compared to the entire population, with 53% of the Hispanic households paying more than 30% of their income for housing costs. Asian households experience a disproportionately greater incidence of severe housing cost burdens compared to the entire population; 35% of Asian households spend more than 50% of their income on housing costs.

Black/African American households experience a disproportionately greater need with severe housing problems in both very low-income (30-50% AMI) and moderate income (80-100% AMI) categories. Severe housing problem exist when a household experiences one or more of the following housing problems: lacks complete kitchen facilities, lacks complete plumbing facilities, has over 1.5 people per room, and a housing cost burden over 50%. Both Asian and Hispanic low-income (50-80% AMI) households experience a disproportionate number of severe housing problems.

### **Affordability and supply**

The lack of availability rental and owner-occupied units for low-income residents, as indicated by the significant waiting lists for public housing, and the difficulty experienced by Section 8 voucher-holders in trying to find affordable available housing. Additionally, vacancy rates remain low, at 2% for Eugene owner-occupied and rental housing, and 2% in Springfield for owner-occupied housing and 3% for renter units. Data from Oregon Housing and Community Services further supports this need indicating there is a deficit of over 2,700 affordable housing units in Lane County in 2016.

Our strategies to increase the availability of affordable, accessible housing include aggressively pursuing additions to the housing supply through the use of government subsidies and incentives as well as public/private partnerships.

Homes for Good is addressing this need in a variety of ways which include:

- New Construction
- Administrative
- Preservation
- Development Pipeline

## New Construction

5 New Construction projects are currently underway totaling 224 units with total budgets over \$62 million

Market District Commons (\$17 million total budget)	<p>This 50-unit project is the culmination of 6 years of pre-development planning and is a cornerstone of an unprecedented level of investment in downtown revitalization.</p> <p>Currently at 50% completion due to open in October 2020.</p> <p>15 Project Based Section 8 vouchers awarded to the project.</p> <p>These units will be prioritized for veterans experiencing homelessness and people with disabilities.</p>
The Commons on MLK (\$13 million total budget)	<p>This 51-unit project is a powerful partnership with Lane County to implement the priorities/goals of the Poverty and Homelessness Board.</p> <p>The project has received the following capital commitments - \$3mm from OHCS for a non-competitive housing first project, \$500k from Trillium, \$750k from the Federal Home Loan Bank, \$540k from the Oregon Health Authority, \$500k from Pacific Source, \$1.1mm from the City of Eugene and we have two outstanding requests of \$500k each from Kaiser and Peace Health.</p> <p>The project has received the following supportive services commitments - \$180k from Pacific Source and \$250k each from Kaiser and Pacific Source.</p> <p>51 Project Based Section 8 vouchers have been awarded to the project.</p> <p>Construction is expected to be complete in December 2020 with doors opening in January 2021</p>
Sarang (1 of 2 projects part of \$32mm Rental Assistance Demonstration Preservation RAD replacement Project.)	<p>This 49-unit project is one of two different sites in one financial transaction. for Good received approval from HUD through the RAD program to sell 100 single family homes and duplexes that receive a Public Housing rental/operating subsidy and converting these subsidies to a Section 8 subsidy that will be place into 100 newly constructed units. This project will produce 49 of the units in Eugene.</p>
Hayden Bridge Landing (2 <sup>nd</sup> RAD replacement project)	<p>This 70-unit project is the second site in the one financial transaction. This project will produce the remaining 53 replacement of the units in Springfield with attached rental subsidy and an additional 17 units that will provide much needed one-bedroom units.</p>
Legion Cottages	<p>This 4-unit tiny home project in Cottage Grove will provide much needed housing for homeless veterans.</p>

## Administrative

100 West 13 <sup>th</sup> Ave	\$10 mm acquisition and renovation of new administrative headquarters at in Eugene completed in May 2020
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## Preservation

Sheldon Village	\$4.3mm preservation project for Sheldon Village through comprehensive rehabilitation This 78-unit project that was built in 2 phases in 2004 and 2005. Capital needs assessment completed in 2015 indicated significant envelope and water intrusion issues. Comprehensive rehabilitation completed in late 2019
RAD	Future RAD Conversions – Homes for Good is looking at future phases of converting the remaining public housing through the RAD process Preservation of Federal Subsidies in Lane County – Homes for Good is looking at several developments that may need preservation work to preserve ongoing federal subsidies

## Development Pipeline

The Keystone	This 15-unit Permanent Supportive Housing development in Eugene will serve homeless families. It received funding in April through OHCS and will begin construction in fall of 2020.
1100 Charnelton	This 45-unit Permanent Supportive Housing development in Downtown Eugene will serve homeless individuals and couples. Staff will apply for 9 percent tax credit funding in May of 2020.
Glenwood	Homes for Good acquired property in Glenwood that will be used for a future development of 100 to 150 units.
Springfield	Homes for Good is looking to acquire property in Springfield to facilitate permanent supportive housing units for homeless families
Rural Lane County	Homes for Good is working with organizations

## Impediments to Fair Housing

While some of the identified impediments are not directly related to the federal Fair Housing Act, as a Public Housing Authority that sponsors the Fair Housing Council of Oregon, Homes for Good continues to believe that the lack of availability of affordable, accessible housing is a problem in our community and therefore, had maintained its efforts to promote affordable, accessible housing in addition to our efforts to overcome the more specific impediments which are directly related to the federal Fair Housing Act. Three major impediments to providing equal housing to populations were identified in development of the annual plan as follows:

1. Limited Awareness of Fair Housing Policies in the Broader Community;
2. Cultural differences and language barriers which inhibit access to fair housing, and;
3. People with disabilities who have special housing needs have limited choices and are often constrained by their lower incomes.

**Impediment: Limited awareness of fair housing policies in the broader community.** Strategies to address this impediment include:

Participating in community engagement and is very involved in area- wide Fair Housing planning and efforts.

Joining various relevant boards, including the Rental Owners Association (ROA), Human Rights Commission, Housing Policy Board, United Way Equity Coalition and Lane County Poverty and Homeless Board.

Executive Director Jacob Fox is on the Poverty and Homelessness Board, and chairs their facilities committee; in that position Jacob strives to further the goals of Fair Housing.



Rent Assistance Division Director, Beth Ochs continues to serve on the board of the Lane County Rental Owner's Association (ROA). This board meets monthly. As of June 2020, the ROA has 1228 members representing 16,764 rental properties in Lane County. Homes for Good's Landlord Liaison, Travis Baker also routinely participates in the ROA. Travis attends the monthly general membership meeting, provides informational seminars on Homes for Good's housing programs and submits monthly articles to the ROA newsletter.

Real Estate Development Director, Steve Ochs is on the Housing Policy Board which sets local policy regarding housing and works to further Fair Housing Goals.

Using every opportunity to make regular presentations to Springfield/Eugene groups including Eugene City Club, the University of Oregon, Chambers of Commerce and the Fair Housing Conference.

Homes for Good continues to support Blacks in Government and NAACP at their annual celebrations and educational events.

Homes for Good is planning a mandated a 4 hour all-staff training in Fair Housing laws.

Updated Fair Housing information was added during a recent revision of the Section 8 program briefing packets.

Homes for Good staff participate annually in the University of Oregon Internship Fair. This is an opportunity to inform students about Homes for Good's work in the community to promote Fair Housing.

Homes for Good has produced updated maps showing concentrations of poverty in Lane County. Homes for Good is actively engaged in placing the briefing, which include maps noting concentrations of poverty within Lane County, on its website. Placement on the website will create ease of access to those we serve and will allow Homes for Good to continue to provide housing even with social distance measures in place, given COVID-19.

Homes for Good has produced updated maps showing concentrations of poverty in Lane County.

Homes for Good has a presence on the Human Rights Commission and the United Way Equity Coalition.

**Impediment: Cultural differences and language barriers which inhibit access to fair housing.** Strategies to address this impediment include:

We are working on our Diversity, Equity and Inclusion initiative which includes staff education and an equity centered service and programming. We will be creating an Equity Strategy Team to help guide our work.

Conduct targeted recruitments for bilingual employees. At the present time there are 11 bilingual employees (English/Spanish). Homes for Good also has 4 staff members proficient in German, Dutch, Czech, Polish, Hindi and French.

Homes for Good has implemented a Language Access Plan, which will provide access to translation services as needed for participants as well as provide our most commonly used forms in various languages.

**Impediment: People with disabilities who have special housing needs have limited choices and are often constrained by their lower incomes.** Strategies to address this impediment include:

Quarterly meetings at VA to expedite referrals for homeless vets. Waiver requests to HUD to allow CARES Act funds to be utilized for deposits and fees.

Administer an Emergency Housing Assistance (EHA) grant which assists Mainstream voucher holders with miscellaneous costs related to lease-up. Mainstream Vouchers serve non-elderly disabled persons.

Quarterly meetings with Shelter Plus Care service providers to expedite referrals for S+C Program.

Provide sufficient ADA units in public housing and LIHTC housing.

Working closely with residents to ensure reasonable accommodations are approved when appropriate.

Homes for Good, in partnership with Lane County, is working to expand the Housing First movement for people with disabilities or other barriers to housing.

In addition to these specific strategies Homes for Good has made a strong commitment to promoting Fair Housing rights and Fair Housing choice by providing information regarding Fair Housing and Fair Housing choice to applicants, residents and staff. Following is a list of actions that Homes for Good has taken:

The Fair Housing logo "Equal Housing Opportunity" is prominently displayed on location signs at Homes for Good's two administrative offices and at its various housing complexes

The Fair housing logo is prominently displayed on signs/banners at various Homes for Good locations, announcing the availability of low-income rental units

The Fair Housing logo is on Homes for Good letterhead and business cards

The Agency's Policy of Nondiscrimination on the Basis of Disability/Handicap Status is prominently displayed in the lobbies of the two administrative offices and in public areas at its various housing complexes

The Agency's Policy of Nondiscrimination on the Basis of Disability/Handicap Status is prominently displayed on the website: [www.HomesforGood.org](http://www.HomesforGood.org)

HUD Form 928.1 ("We Do Business in Accordance with the Federal Fair Housing Law" poster) is prominently displayed in English and Spanish in Homes for Good's administrative office and in public areas at the various housing complexes

HUD Form 1686-FHEO (\*Fair Housing – It's Your Right\* Pamphlet) is available in English and Spanish in the two administrative offices

\*Filing a Housing 'Discrimination Complaint\* - a pamphlet created by Consumer Action with funding from the U.S Department of Housing and Urban Development (HUD) is available in English and Spanish at Homes for Good's two administrative offices

Applicants or residents with questions about Fair Housing issues are referred, or directed via website link, to the Fair Housing Council of Oregon, Legal Aid Services of Oregon (LSAO) or Lane County Law & Advocacy Center (LCLAC), the Oregon Advocacy Center (OAC), the Lane Independent Living Alliance (LILA), the Oregon Bureau of Labor and Industries (BOLI), and/or to the US Department of Housing & Urban Development (HUD) / Office of Fair Housing and Equal Opportunity (FHEO)

Homes for Good has a long-standing Policy on Reasonable Accommodation, which is recognized in the Pacific Northwest among public Housing Authorities and by the regional HUD office as being comprehensive, well-written, and well-implemented.

Homes for Good's Policy on Reasonable Accommodation is prominently displayed in administrative office and in public areas of its various housing complexes. It is available to any applicant or resident and is included in the Admin Plan and Admissions and Continued Occupancy Policies. It is also posted on Homes for Good's website at [www.HomesforGood.org](http://www.HomesforGood.org)

Applicants for, and recipients of, housing assistance from Homes for Good are advised of their right to request a reasonable accommodation to their disability. Information regarding reasonable accommodations is provided on the pre-application for assistance, in initial determination of ineligibility, in the public housing and assisted housing lease agreements, in notices of eviction, in periodic resident newsletters, and discussed during the intake process during any informal settlement discussions and during other discussions with applicants and/or residents when inquiries are made about accommodating disabilities.

Under the terms of a voluntary compliance agreement between the us department of HUD/FHEO and Homes for Good's pre-application for housing assistance requests information from applicants, which is not used in determining their eligibility for housing regarding their ethnicity, race, and disability status. This information is recorded, retained, and available to HUD upon request

Homes for Good has completed outreach presentations to agencies representing youth, seniors/elderly, persons with physical and/or mental disabilities, and minorities, to help assure that a broad base of the community has access to information about the availability of housing. This outreach effort continues on an ongoing basis and representatives from a number of those social service/advocacy agencies serve on Homes for Good's family self-sufficiency advisory board.

Homes for Good maintains reception staff, as well as other staff in all departments that have ongoing contact with residents, who are bilingual/bicultural in Spanish and English.

Homes for Good has also worked to increase the ability of low-income community members to access housing by developing an innovative program in cooperation with community lending-works, the lending arm of DevNW (neighborhood economic development corporation), to assist applicants to its agency-owned housing programs, in obtaining loans to cover the cost of their security deposits, as they lease up with Homes for Good. Homes for Good indemnifies the loans, guaranteeing payment to DevNW, should the applicant default.

# Financial Resources

## HOMES FOR GOOD HOUSING AGENCY BUDGET - SUMMARY OF RESOURCES - FY 2020

PROGRAM	BEGINNING RESERVE	FEDERAL REVENUE	RENT	OTHER	TOTAL
<b>Community Services</b>					
Development	9,900,000	-	245,000	25,295,000	35,440,000
Weatherization	47,000	1,117,000	-	648,000	1,812,000
Shelter Plus Care	5,000	817,000	-	-	822,000
Herran Center	497,000	-	259,000	-	756,000
Signpost House	279,000	-	90,000	-	369,000
Family Self Sufficiency	-	287,000	-	-	287,000
VA Per Diem	-	150,000	-	-	150,000
Family Shelter House	50,000	-	62,000	-	112,000
ROSS	-	88,000	-	-	88,000
Emergency Housing Assistance	-	34,000	-	-	34,000
Homes for Good Foundation	-	-	-	2,000	2,000
	<b>10,778,000</b>	<b>2,493,000</b>	<b>656,000</b>	<b>25,945,000</b>	<b>39,872,000</b>
<b>Housing</b>					
Public Housing	1,542,000	1,588,000	2,019,000	40,000	5,189,000
Firwood	198,000	-	600,000	1,800	799,800
Norseman	395,000	-	300,000	-	695,000
Jacob's Lane	233,000	-	400,000	10,500	643,500
Sheldon Village Apartments	-	-	600,000	4,300	604,300
Village Oaks	147,000	92,000	400,000	7,000	646,000
Fourteen Pines	302,000	286,000	200,000	4,000	792,000
Laurel Gardens	143,000	-	200,000	5,900	348,900
Walnut Park	63,000	-	250,000	4,000	317,000
The Orchards	27,000	-	250,000	1,500	278,500
Abbie Lane	165,000	225,000	100,000	1,000	491,000
Camas Place	47,000	-	200,000	-	247,000
Capital Fund	-	1,494,000	-	-	1,494,000
	<b>3,262,000</b>	<b>3,685,000</b>	<b>5,519,000</b>	<b>80,000</b>	<b>12,546,000</b>
<b>Rental Assistance</b>	<b>1,984,000</b>	<b>21,746,000</b>	<b>-</b>	<b>-</b>	<b>23,730,000</b>
<b>Central Office Cost Center</b>	<b>-</b>	<b>-</b>	<b>685,000</b>	<b>2,708,000</b>	<b>3,393,000</b>
<b>TOTALS</b>	<b>\$ 16,024,000</b>	<b>\$ 27,924,000</b>	<b>\$ 6,860,000</b>	<b>\$ 28,733,000</b>	<b>\$ 79,541,000</b>





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Homes. People. Partnerships. Good. [www.homesforgood.org](http://www.homesforgood.org)



### **SUPPORTIVE HOUSING PET POLICY**

The purpose of a pet policy is to establish clear guidelines for ownership of pets and to ensure that no applicant or resident is discriminated against regarding admission or continued occupancy because of ownership of pets.

#### **Registration of Pets**

Pets must be registered with the PHA before they are brought onto the property.

Conditional approval (not to exceed one month) may be granted to allow registration steps.

Registration includes documentation signed by a licensed veterinarian or state/local authority that the pet has received all inoculations required by state or local law, and that the pet has no communicable disease(s) and is pest-free. This registration must be renewed annually and will be coordinated with the annual reexamination date.

Pets will not be approved to reside in a unit until completion of the registration requirements.

#### **Pet Agreement**

Residents who have been approved to have a pet must enter into a pet agreement with the PHA, or the approval of the pet will be withdrawn.

The pet agreement is the resident's certification that he or she has received a copy of the PHA's pet policy and applicable house rules, that he or she has read the policies and/or rules, understands them, and agrees to comply with them.

The resident further certifies by signing the pet agreement that he or she understands that noncompliance with the PHA's pet policy and applicable house rules may result in the withdrawal of PHA approval of the pet or termination of tenancy.

#### **Responsible Parties**

The pet owner will be required to designate a responsible party for the care of the pet if the health or safety of the pet is threatened by the death or incapacity of the pet owner, or by other factors that render the pet owner unable to care for the pet.

A resident who cares for another resident's pet must notify the PHA and sign a statement that they agree to abide by all of the pet rules.

#### **Refusal to Register Pets**

The PHA will refuse to register a pet if:

The pet is not a *common household pet* as defined below

Keeping the pet would violate any pet restrictions listed in this policy

The pet owner fails to provide complete pet registration information, or fails to update the registration annually

The applicant or tenant has previously been charged with animal cruelty under state or local law; or has been evicted, had to relinquish a pet or been prohibited from future pet ownership due to pet rule violations or a court order

The PHA reasonably determines that the pet owner is unable to keep the pet in compliance with the pet rules and other lease obligations. The pet's temperament and behavior may be considered as a factor in determining the pet owner's ability to comply with provisions of the lease.

If the PHA refuses to register a pet, a written notification will be sent to the pet owner within 14 calendar days of the PHA's decision. The notice will state the reason for refusing to register the pet and will inform the family of their right to appeal the decision in accordance with the PHA's grievance procedures.

#### **Pet Removal**

If the death or incapacity of the pet owner threatens the health or safety of the pet, or other factors occur that render the owner unable to care for the pet, the situation will be reported to the responsible party designated by the pet owner.

If the responsible party is unwilling or unable to care for the pet, or if the PHA after reasonable efforts cannot contact the responsible party, the PHA may contact the appropriate state or local agency and request the removal of the pet.

<p><b>Definition of "Common Household Pet"</b></p> <p><i>Common household pet</i> means a domesticated animal, such as a dog, cat, bird, or fish that is traditionally recognized as a companion animal and is kept in the home for pleasure rather than commercial purposes.</p> <p>The following animals are not considered common household pets:</p> <ul style="list-style-type: none"> <li>• Reptiles</li> <li>• Rodents</li> <li>• Insects</li> <li>• Arachnids</li> <li>• Wild animals or feral animals</li> <li>• Pot-bellied pigs</li> <li>• Animals used for commercial breeding</li> </ul>	<p><b>Pet Restrictions</b></p> <p>The following animals are not permitted:</p> <p>Any animal whose adult weight will exceed 30 pounds and whose shoulder height will exceed 15 inches.</p> <p>Ferrets or other animals whose natural protective mechanisms pose a risk to small children of serious bites or lacerations</p> <p>Any animal not permitted under state or local law or code</p> <p><b>Number of Pets</b></p> <p>Residents may own a maximum of 2 pets, only 1 of which may be a dog.</p> <p>In the case of fish, residents may keep no more than can be maintained in a safe and healthy manner in a tank holding up to 10 gallons. Such a tank or aquarium will be counted as 1 pet.</p>
<p><b>Other Requirements</b></p> <p>Dogs and cats must be spayed or neutered at the time of registration or, in the case of underage animals, within 30 days of the pet reaching 6 months of age. Exceptions may be made upon veterinary certification that subjecting this particular pet to the procedure would be temporarily or permanently medically unsafe or unnecessary.</p> <p>Pets must be licensed in accordance with state or local law. Residents must provide proof of licensing at the time of registration and annually, in conjunction with the resident's annual reexamination.</p>	
<p><b>Pet Area Restrictions</b></p> <p>Pets must be maintained within the resident's unit. When outside of the unit (within the building or on the grounds) dogs and cats must be kept on a leash or carried. They must be under the control of the resident or other responsible individual at all times.</p> <p>Pets other than dogs or cats must be kept in a cage or carrier when outside of the unit.</p> <p>Pets are not permitted in common areas including lobbies, community rooms and laundry areas except for those common areas which are entrances to and exits from the building.</p> <p>Pet owners are not permitted to exercise pets or permit pets to deposit waste on the property outside of the areas designated for such purposes.</p>	<p><b>Noise</b></p> <p>Pet owners must agree to control the noise of pets so that their noise is not a nuisance to other residents or interrupt their peaceful enjoyment of their housing unit or property. This includes, but is not limited to loud or continuous barking, howling, whining, biting, scratching, chirping, or other such activities.</p> <p><b>Pets Temporarily on the Premises</b></p> <p>Pets that are not owned by a tenant are not allowed on the premises. Residents are prohibited from feeding or harboring stray animals. Residents may however have bird feeders.</p> <p>This rule does not apply to visiting pet programs sponsored by a humane society or other non-profit organizations, and approved by the PHA.</p>



**Cleanliness**

The pet owner shall be responsible for the removal of waste from the exercise area by placing it in a sealed plastic bag and disposing of it in an appropriate receptacle.

The pet owner shall take adequate precautions to eliminate any pet odors within or around the unit and to maintain the unit in a sanitary condition at all times.

Litter box requirements:

Pet owners must promptly dispose of waste from litter boxes and must maintain litter boxes in a sanitary manner.

Litter shall not be disposed of by being flushed through a toilet.

Litter boxes shall be kept inside the resident's dwelling unit.

**Pet Rule Violations**

All complaints of cruelty and all dog bites will be referred to animal control or an applicable agency for investigation and enforcement.

If a determination is made on objective facts supported by written statements, that a resident/pet owner has violated the pet rules, written notice will be served.

The notice will contain a brief statement of the factual basis for the determination and the pet rule(s) that were violated. The notice will also state:

That the pet owner has 14 calendar days from the effective date of the service of notice to correct the violation or make written request for a meeting to discuss the violation

That the pet owner is entitled to be accompanied by another person of his or her choice at the meeting

That the pet owner's failure to correct the violation, request a meeting, or appear at a requested meeting may result in initiation of procedures to remove the pet, or to terminate the pet owner's tenancy

**Pet Care**

Each pet owner shall be responsible for adequate care, nutrition, exercise and medical attention for his/her pet.

Each pet owner shall be responsible for appropriately training and caring for his/her pet to ensure that the pet is not a nuisance or danger to other residents and does not damage PHA property.

No dog may be allowed unleashed outside unless the pet owner has a fully fenced private yard and maintains the dog within that space. No animals may be tethered or chained inside or outside the dwelling unit at any time.

**Alterations to Unit**

Pet owners shall not alter their unit, patio, premises or common areas to create an enclosure for any animal.

Installation of pet doors is not allowed.

**Notice for Pet Removal**

If the pet owner and the PHA are unable to resolve the violation at the meeting or the pet owner fails to correct the violation in the time period allotted by the PHA, the PHA may serve notice to remove the pet.

The notice will contain:

A brief statement of the factual basis for the PHA's determination of the pet rule that has been violated

The requirement that the resident /pet owner must remove the pet within 30 calendar days of the notice

A statement that failure to remove the pet may result in the initiation of termination of tenancy procedures

**Termination of Tenancy**

The PHA may initiate procedures for termination of tenancy based on a pet rule violation if:

The pet owner has failed to remove the pet or correct a pet rule violation within the time period specified

The pet rule violation is sufficient to begin procedures to terminate tenancy under terms of the lease

### **Emergencies**

The PHA will take all necessary steps to ensure that pets that become vicious, display symptoms of severe illness, or demonstrate behavior that constitutes an immediate threat to the health or safety of others, are immediately removed from the premises by referring the situation to the appropriate state or local entity authorized to remove such animals.

If it is necessary for the PHA to place the pet in a shelter facility, the cost will be the responsibility of the pet owner.

If the pet is removed as a result of any aggressive act on the part of the pet, the pet will not be allowed back on the property.

### **Payment of Deposit**

Pet owners are required to pay a pet deposit of \$200 in addition to any other required deposits. The deposit may be paid in full or with a signed payment plan of \$50 down and \$10 per month before the pet is brought on the premises.

The pet deposit is not part of rent payable by the resident.

### **Refund of Deposit**

The PHA will refund the pet deposit to the resident, less the costs of any damages caused by the pet to the dwelling unit, within 30 days of move-out or removal of the pet from the unit.

The resident will be billed for any amount that exceeds the pet deposit.

The PHA will provide the resident with a written list of any charges against the pet deposit within 30 calendar days of the move-out inspection. If the resident disagrees with the amount charged to the pet deposit, the PHA will provide a meeting to discuss the charges.

### **Pet-Related Damages During Occupancy**

All reasonable expenses incurred by the PHA as a result of damages directly attributable to the presence of the pet on the property will be the responsibility of the resident, including:

Cost of repairs and replacements to the resident's dwelling unit

Fumigation of the dwelling unit

Repairs to common areas of the property

Cost of flea elimination

If the resident is in occupancy when such costs occur, the resident shall be billed for such costs in accordance with the policies for Maintenance and Damage Charges. Pet deposits will not be applied to the costs of pet-related damages during occupancy.

Charges for pet-related damage are not part of rent payable by the resident.

My signature below indicates that I have read, understood, and agree to this policy:

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Homes for Good Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**KEY MODIFICATIONS TO THE HOMES FOR GOOD  
ADMISSIONS AND CONTINUED OCCUPANCY POLICIES (ACOP) FISCAL YEAR 2021  
EFFECTIVE DATE 10-1-20 TO 9-30-21**

Section	Previous Policy	Proposed Policy	Required Change	Impact
1-I.C. PHA MISSION	Making a difference in the quality of affordable housing and related community services.	Our mission is Homes. People. Partnerships. Good. Homes for Good is Lane County's housing agency and our primary work is to help low-income residents with the logistics of affordable housing. At a higher level, we are neighbors united to get every Lane County resident who needs help, into a home.	No	Updated mission statement
Throughout	Homes for Good	The PHA	No	Aligns style with Section 8 Administrative Plan and the model language for efficient updates.
3-I.J. GUESTS	A family is allowed a total of 14 overnight guest visits in any 12 month period; this limit applies, whether used by one or several guests.	A resident family must notify the PHA when overnight guests will be staying in the unit for more than 3 days. A guest can remain in the unit no longer than 14 consecutive days or a total of 30 cumulative calendar days during any 12 month period.	No	More effectively tracks overnight guests and prevents individuals from becoming unauthorized occupants.

Section	Previous Policy	Proposed Policy	Required Change	Impact
3-I.L. ABSENT FAMILY MEMBERS	Generally an individual who is or is expected to be absent from the public housing unit for 90 consecutive days or less is considered temporarily absent and continues to be considered a family member. Generally an individual who is or is expected to be absent from the public housing unit for more than 90 consecutive days is considered permanently absent and no longer a family member. Exceptions to this general policy are discussed below.	Generally an individual who is or is expected to be absent from the public housing unit for 180 consecutive days or less is considered temporarily absent and continues to be considered a family member. Generally an individual who is or is expected to be absent from the public housing unit for more than 180 consecutive days is considered permanently absent and no longer a family member. Exceptions to this general policy are discussed below.	No	Provides more flexibility for residents receiving medical care.
3-I.L. ABSENT FAMILY MEMBERS	An employed head, spouse, or cohead absent from the unit more than 90 consecutive days due to employment will continue to be considered a family member.	An employed head, spouse, or cohead absent from the unit more than 180 consecutive days due to employment will continue to be considered a family member.	No	Provides more flexibility for working residents.
3-III.D. SCREENING	Home visits may be used to determine the applicant's ability to care for the unit.		No	Was discontinued many years ago.



Section	Previous Policy	Proposed Policy	Required Change	Impact
3-III.F. PROHIBITION AGAINST DENIAL OF ASSISTANCE TO VICTIMS OF DOMESTIC VIOLENCE, DATING VIOLENCE, SEXUAL ASSAULT, OR STALKING	Homes for Good will request in writing that an applicant wishing to claim this protection must notify Homes for Good within 14 business days.	The PHA will request in writing that an applicant wishing to claim this protection notify the PHA within 14 calendar days.	No	Makes response periods more consistent throughout.
4-III.B. SELECTION METHOD	To meet deconcentration goals, effective 10/1/17, admissions to Pengra Court Apartments will be limited to families whose gross income falls between the Very Low Income (VLI) limit and the Low Income (LI) limit.	Factors such as deconcentration or income mixing and income targeting will also be considered in accordance with HUD requirements and PHA policy.	No	Removes no longer applicable goals

Section	Previous Policy	Proposed Policy	Required Change	Impact
5-I.B. DETERMINING UNIT SIZE	<p>Homes for Good will assign one bedroom for each two persons within the household, except in the following circumstances:</p> <p>Persons of the opposite sex (other than spouses, and children under age 5) will not be required to share a bedroom. Persons of different generations will not be required to share a bedroom. Different generation is defined as a difference of 8 years or more. Minors age 16 or more will be assigned their own bedroom.</p>	<p>The head of household, including the spouse or co-head, will be allocated one bedroom.</p> <p>All other household members will be based on two (2) persons per bedroom, without regard to gender or age.</p> <p>Live-in aides will be allocated a separate bedroom. Family members of a live-in aide will not be considered when determining family unit size.</p>	No	Align with Section 8 HCV occupancy standards and appropriately house families.

Section	Previous Policy	Proposed Policy	Required Change	Impact
6-I.B. HOUSEHOLD COMPOSITION AND INCOME	Absences in excess of 30 days require Homes for Good's approval. Generally an individual who is or is expected to be absent from the unit for 90 consecutive days or less is considered temporarily absent and continues to be considered a family member. Generally an individual who is or is expected to be absent from the unit for more than 180 consecutive days is considered permanently absent and no longer a family member. Exceptions to this general policy are discussed below.	Absences in excess of 30 days require Homes for Good's approval.  Generally an individual who is or is expected to be absent from the assisted unit for 180 consecutive days or less is considered temporarily absent and continues to be considered a family member. Generally an individual who is or is expected to be absent from the assisted unit for more than 180 consecutive days is considered permanently absent and no longer a family member. Exceptions to this general policy are discussed below.	No	Aligns with changes in absence policy.
10-II.B. MANAGEMENT APPROVAL OF PETS		Conditional approval (not to exceed one month) may be granted to facilitate registration steps.	No	Added additional language to existing policy, in order to allow residents to complete pet adoptions.

Section	Previous Policy	Proposed Policy	Required Change	Impact
10-II.C. STANDARDS FOR PETS	<p>Residents may own a maximum of 2 pets, only 1 of which may be a dog or cat.</p> <p>Residents may have 1 guinea pig, hamster, rabbit or gerbil.</p> <p>In the case of fish, residents may keep no more than can be maintained in a safe and healthy manner in a tank holding up to 20 gallons. Such a tank or aquarium will be counted as 1 pet.</p>	<p>Residents may own a maximum of 2 pets, only 1 of which may be a dog.</p> <p>In the case of fish, residents may keep no more than can be maintained in a safe and healthy manner in a tank holding up to 10 gallons. Such a tank or aquarium will be counted as 1 pet.</p>	No	Simplified pet rules are easier to understand and enforce
10-II.D. PET RULES	<p>Pets must be maintained within the resident's unit. When outside of the unit (within the building or on the grounds) dogs and cats must be kept on a leash, carried and/or under the immediate control of the resident or other responsible individual at all times.</p>	<p>Pets must be maintained within the resident's unit.</p> <p>When outside of the unit (within the building or on the grounds) dogs and cats must be kept on a leash or carried. They must be under the control of the resident or other responsible individual at all times.</p>	No	Clarifies that pets outside of the unit must be on a leash.

Section	Previous Policy	Proposed Policy	Required Change	Impact
10-II.D. PET RULES	Homes for Good has not designated any buildings, floors of buildings, or sections of buildings as no-pet areas. In addition, Homes for Good has not designated any buildings, floors of buildings, or sections of buildings for residency of pet-owning tenants.	With the exception of common areas as described in the previous policy, the PHA has not designated any buildings, floors of buildings, or sections of buildings as no-pet areas. In addition, the PHA has not designated any buildings, floors of buildings, or sections of buildings for residency of pet-owning tenants.	No	Clarifies that pets are not allowed in building common areas that are not entrances and exits.
10-II.D. PET RULES	Residents must promptly dispose of waste from litter boxes and must maintain litter boxes in a sanitary manner. Litter must be cleaned daily and changed at least weekly. Litter shall not be disposed of by being flushed through a toilet. Litter boxes shall be kept inside the resident's dwelling unit.	Litter box requirements: Pet owners must promptly dispose of waste from litter boxes and must maintain litter boxes in a sanitary manner. Litter shall not be disposed of by being flushed through a toilet. Litter boxes shall be kept inside the resident's dwelling unit.	No	Simplifies pet rules.



Section	Previous Policy	Proposed Policy	Required Change	Impact
12-I.B. EMERGENCY TRANSFERS	Maintenance conditions in the resident's unit, building or at the site that pose an immediate, verifiable threat to the life, health or safety of the resident or family members that cannot be immediately repaired or abated.	Maintenance conditions in the resident's unit, building or at the site that pose an immediate, verifiable threat to the life, health, or safety of the resident or family members that cannot be repaired or abated within 24 hours.	No	Defines immediately.
12-III.C. ELIGIBILITY FOR TRANSFER	Except where transfers for serious medical reasons or reasonable accommodation are being requested, Homes for Good will only consider transfer requests from residents that meet the following requirements:	Except where reasonable accommodation is being requested, the PHA will only consider transfer requests from residents that meet the following requirements:	No	Requires verification from a qualified professional through a reasonable accommodation.

Section	Previous Policy	Proposed Policy	Required Change	Impact
12-IV.B. TRANSFER LIST	Emergency transfers will not automatically go on the transfer list. Instead emergency transfers will be handled immediately, on a case by case basis. If the emergency cannot be resolved by a temporary accommodation, and the resident requires a permanent transfer, the family will be placed at the top of the transfer list.	With the approval of the division director, the PHA may, on a case-by-case basis, transfer a family without regard to its placement on the transfer list in order to address the immediate need of a family in crisis.	No	Requires division director approval to bypass normal transfer procedures.
16-II.B. FLAT RENTS	Homes for Good will publicly post the schedule of flat rents in a conspicuous manner in the Homes for Good, 300 W Fairview Drive Office.	The PHA will publicly post the schedule of flat rents in a conspicuous manner in the applicable PHA or project office.	Yes	Reflect changed administrative building.

**KEY MODIFICATIONS TO THE HOMES FOR GOOD  
RENT ASSISTANCE ADMINISTRATIVE PLAN FISCAL YEAR 2021  
EFFECTIVE DATE 10-1-2020 TO 9-30-2021**

**PROPOSED CHANGES TO THE FOLLOWING CHAPTERS**

Chapter 4: Applications, Waiting List, and Tenant Selection

Chapter 6: Income and Subsidy Determinations

Chapter 7: Verification

Chapter 9: General Leasing Policies

Chapter 10: Moving with Continued Assistance and Portability

Chapter 11: Reexaminations

Chapter 14: Program Integrity

Chapter 16: Program Administration

**KEY MODIFICATIONS TO THE HOMES FOR GOOD  
ADMINISTRATIVE PLAN FOR THE HOUSING CHOICE VOUCHER PROGRAM (ADMIN PLAN)  
PROPOSED EFFECTIVE DATE 10-1-2020**

Section	Previous Policy	Proposed Policy	Required Change	Impact
<b>4-II.F.</b>	(Regarding removal from the waitlist) The family's response must be in writing and may be delivered in person, by mail or by fax.	(Regarding removal from the waitlist) The family's response must be in writing and may be delivered in person, by mail, <b>email</b> or by fax.	No	Allows for an additional method for communicating with Homes for Good.
<b>4-III.C.</b>	None	<b>An Approved Entity with higher preference points will be indicated in the MOU and on Homes for Good's website. Unless otherwise noted all Local Preferences will be weighted the same.</b>	No	Allows Homes for Good to meet the housing needs of various hard to house populations.
<b>4-III.C.</b>	Non-Elderly Persons with Disabilities Preference <b>(limited to 33 families utilizing a Mainstream Voucher).</b>	Non-Elderly Persons with Disabilities Preference	Yes	Allows an applicant on the waitlist who meets the qualifications of a Mainstream voucher to access one in order of placement on the waitlist.
<b>6-I.M.</b>	None	<b>Distributions from an ABLE account, and actual or imputed interest on the ABLE Account balance</b>	Yes	A source of income that is excluded. Allows disabled persons to save money in dedicated ABLE Account and not affect Federal Benefits, such as SSI, SSDI, Medicaid, and Housing Assistance. If a program participant provides proof, they have an ABLE Account, the funds in the account will not be counted as income and the interest earned will not be counted as income from an asset.
<b>7-I. B</b>	<b>Any documents used for verification must be the original (not photocopies) and generally</b> must be dated within 60 days of the date they are provided to the PHA. The documents must not be damaged, altered or in any way illegible.	Documents must be dated within 60 days of the date they are provided to the PHA. The documents must not be damaged, altered or in any way illegible.	No	Provides clarification as to what can be used for verification.

Section	Previous Policy	Proposed Policy	Required Change	Impact
	<p><b>Print-outs from Web pages are considered original documents.</b></p> <p>The PHA staff member who views the original document must make a photocopy, annotate the copy with the name of the person who provided the document and the date the original was viewed and sign the copy.</p> <p>Any family self-certifications must be made in a format acceptable to the PHA and may be signed in the presence of a PHA representative or notary public.</p>	<p>If the PHA staff member views the original document makes a photocopy, staff must annotate the copy with the name of the person who provided the document and the date the original was viewed and sign the copy.</p> <p>Any family self-certifications must be made in a format acceptable to the PHA and may be signed in the presence of a PHA representative or notary public.</p>		
<b>7-I.C.</b>	<p>The PHA will obtain income reports for annual reexaminations on a monthly basis. Reports will be generated as part of the regular reexamination process.</p> <p>Income reports will be compared to family-provided information as part of the annual reexamination process. Income reports may be used in the calculation of annual income, as described in Chapter 6-I.C. Income reports may also be used to meet the regulatory requirement for third party verification, as described above. Policies for resolving discrepancies between income reports and family-provided information will be resolved as described in Chapter 6-I.C and in this chapter.</p> <p>Income reports will be used in interim reexaminations to identify any discrepancies between reported income and income shown in the EIV system, and as necessary to verify earned income, and to verify and calculate unemployment benefits, Social Security and/or SSI benefits. EIV will also be used to verify that families claiming zero income are not receiving income from any of these sources.</p> <p>Income reports will be retained in participant files with the applicable annual or interim reexamination documents.</p> <p>When the PHA determines through income reports and third-party verification that a family has concealed or under reported income, corrective action will be taken</p>	<p>The PHA will obtain income <b>and IVT</b> reports for annual reexaminations on a monthly basis. Reports will be generated as part of the regular reexamination process.</p> <p>Income <b>and IVT</b> reports will be compared to family-provided information as part of the annual reexamination process. Income reports may be used in the calculation of annual income, as described in Chapter 6-I.C. Income reports may also be used to meet the regulatory requirement for third party verification, as described above. Policies for resolving discrepancies between income reports and family-provided information will be resolved as described in Chapter 6-I.C and in this chapter.</p> <p>Income <b>and IVT</b> reports will be used in interim reexaminations triggered by income or family composition changes to identify any discrepancies between reported income and income shown in the EIV system, and as necessary to verify earned income, and to verify and calculate unemployment benefits, Social Security and/or SSI benefits. EIV will also be used to verify that families claiming zero income are not receiving income from any of these sources.</p>	Yes	Provides PHA with a notification of discrepancy regarding families' reported sources of income.



Section	Previous Policy	Proposed Policy	Required Change	Impact
	pursuant to the policies in Chapter 14, Program Integrity.	Income <b>and</b> <b>IVT</b> reports will be retained in participant files with the applicable annual or interim reexamination documents.  When the PHA determines through <b>EIV</b> reports and third-party verification that a family has concealed or under reported income, corrective action will be taken pursuant to the policies in Chapter 14, Program Integrity.		
<b>9-I.A.</b>	The PHA will not screen applicants for family behavior or suitability for tenancy.  The PHA will not provide additional screening information to the owner.	The PHA will not screen applicants for family behavior or suitability for tenancy.  The PHA will not provide additional screening information to the owner.  <b>The PHA will provide requested documentation regarding the subsidized unit address, length of subsidy at said address, and type of voucher to Oregon Housing and Community Services (OHCS) when OHCS is requesting such information in regard to utilization of the Landlord Guarantee Program within the state of Oregon.</b>	No	Allows PHA to provide information to OHCS regarding claims of damage at subsidized unit.
<b>10-I.C.</b>	None	<b>If a zero HAP family requests to move to a new unit, the family may request a voucher to move. However, if no subsidy will be paid at the unit to which the family requests to move, the PHA may enter into a HAP contract on behalf of the family for the new unit.</b>	Yes	Clarifies that a PHA must issue a voucher to a zero HAP family.
<b>11-II.C.</b>	Families are required to report all changes in income or expense, including increases in earned income, including new employment, at the Next Annual Recertification.	Families are required to report all changes in income or expense, including increases in earned income, including new employment, at the Next Annual Recertification <b>time period (beginning with the mailing of the Annual review packet to the tenant up until the effective date of the Annual Reexam).</b>	No	Clarifies when a tenant needs to report changes in income.

Section	Previous Policy	Proposed Policy	Required Change	Impact
<b>11-II.C.</b>	If the family has reported zero income, the PHA will conduct an interim reexamination every 3 months as long as the family continues to report that they have no income.	<b>Remove Policy</b>	No	Reduces administrative burden by collecting income information annually as opposed to every quarter.
<b>14-II.C.</b>	None	<b>Committing sexual or other harassment, either quid pro quo or hostile environment, based on the protected classes defined in Chapter 2.</b>  <b>Retaliating against any applicant or participant reporting/alleging sexual or other harassment, either quid pro quo or hostile environment, based on the protected classes defined in Chapter 2.</b>	No	Adheres to best practice policies defined by Nan McKay, an industry expert in PHA regulations and policy. Clarifies evidence of program owner abuse.
<b>16-VII.C.</b>	The public health department(s) has stated they do not wish to receive a report of an updated list of the addresses of units receiving assistance under the HCV program, on a quarterly basis. Therefore, the PHA is not providing such a report.	<b>The Oregon Health Authority</b> has stated they <b>do</b> wish to receive a report of an updated list of the addresses of units receiving assistance under the HCV program, on a quarterly basis. Therefore, the PHA <b>is</b> providing such a report.	Yes	PHA is able to detect children who may be impacted by elevated blood lead levels and take appropriate action with the property owner.

## Attachment B.2 New Activities

### ✓ **Demolition and/or Disposition**

Homes for Good is evaluating the remaining public housing portfolio to determine if Demo/Disposition or a RAD conversion is appropriate. Homes for Good has submitted a letter of interest (LOI) to HUD regarding the conversion of the remaining Public Housing Portfolio. If it is determined to be appropriate, Homes for Good may submit a Demo/Dispo application for a portion of its public housing portfolio.

### ✓ **Conversion of Public Housing to Project Based Assistance under RAD**

RAD was designed by HUD to assist in addressing the capital needs of public housing by providing access to private sources of capital to repair and preserve its affordable housing assets. Homes for Good submitted applications for participation in the RAD program in November of 2013 to convert 112 of its scattered sites to Project Based Vouchers (PBV). Homes for Good submitted a revised multi-phase application in May of 2016 which allowed conversion of 12 units into Richardson Bridge Apartments as part of a major rehabilitation and sold 12 units of scattered site housing and will transfer assistance to new sites which include 49 units at Sarang in Eugene and 51 units at Hayden Bridge Landing in Springfield. Homes for Good received a Commitment to enter into a Housing Assistance Payment (CHAP) for the remaining 100 units in August of 2018 for AMP 200 and 300.

AMP 200 Springfield Sites: AMP 200 OR000600200 included 20 scattered site units. A multi-phase application was approved in August 2016 for the initial phase that converted 3 units of public housing and transferred the assistance to Richardson Bridge (an existing Homes for Good development). The next phase will be the remaining 17 units to two new housing developments. Construction of the replacement housing began in the spring of 2020. Disposal of some units began at that time and will continue until the replacement housing is up and running in the late spring of 2021.

AMP 300, Eugene Scattered Sites: AMP 300 OR000600300 includes 92 scattered site units. A multi-phase application was approved in August 2016 for the initial phase that converted 9 units of public housing and transferred the assistance to Richardson Bridge (an existing Homes for Good development). Homes for Good disposed of the 9 former PH units for affordable housing purposes in 2018. The next phase will transfer the remaining 83 units to two new housing developments. Construction of the replacement housing began in the spring of 2020. Disposal of some units began at that time and will continue until the replacement housing is up and running in the late spring of 2021.

Homes for Good is evaluating the remaining public housing portfolio to determine if Demo/Disposition or a RAD conversion is appropriate. Homes for Good submitted a letter of interest (LOI) to HUD regarding the conversion of the remaining Public Housing Portfolio in the fall of 2018.

### ✓ **Project Based Vouchers**

It is Homes for Good's intention to publish Request for Proposal(s) in 2021 in order to award Project Based Vouchers. As of March 2020, Homes for Good has awarded 128 Project Based Vouchers. Homes for Good intends to utilize Project Based Vouchers to increase the availability of affordable housing stock in our jurisdiction and well as increase supportive services within the PBV projects. Oregon Housing Community Services' Permanent Supportive Housing Cohort is eager to bring forth permanent supportive housing projects to the state of Oregon. Homes for Good is a member of the cohort and it is anticipated that projects from that cohort would be seeking project-based vouchers.

# Attachment B.3 Progress Report

## Goal 1 Objective: Increase the number of affordable housing units

Indicator	FY20 Progress
Create 300 new affordable housing units	Homes for Good has various projects currently under construction including Market District Commons (50 units), The Commons on MLK (51 units), Sarang (49 units), Hayden Bridge Landing (70 units), Legion Cottages (4 units).
Increase number of permanent supporting housing units (Featured projects: The Commons on MLK, Legion Cottages Tiny Homes, 13 <sup>th</sup> & Tyler, 1100 Charnelton)	70 of the units under construction are Permanent Supportive Housing, as well as a few projects in the development pipeline including The Keystone (15 units PSH), as well as 1100 Charnelton (45 units PSH).
Maintain public housing vacancies at 3% or less	Public Housing continues to maintain an occupancy rate of 97% across the portfolio, with higher vacancies associated with the RAD resident relocations.
Award of 33 mainstream vouchers that serve disabled and homeless or at risk of homelessness persons	33 Mainstream vouchers are being utilized. Received an additional 25 Mainstream Vouchers through a competitive process, and most recently was awarded an additional 18 Mainstream Vouchers in conjunction with the CARES Act on June 1, 2020. Currently, utilizing 38 Mainstream Vouchers. We continue to work with partner agencies to ensure full utilization.
Collaborative community initiative to provide technical support funding to ensure 100% utilization of all 236 VASH vouchers in Lane County	Currently, 207 VASH vouchers are under lease. 26 VASH recipients have been issued vouchers and are searching for housing. Homes for Good has applied for a waiver request from HUD to utilize CARES Act funds to provide deposits and arrears assistance to VASH voucher holders who are seeking housing. Homes for Good continues to meet with local agencies on a quarterly basis to collaborate on the use of all VASH vouchers.

## Goal 2 Objective: Continue to receive high performer status

Indicator	FY20 Progress
Homes for Good received high performer status for FY18 SEMAP	Homes for Good received high performer status for FY19 SEMAP
Obligate all capital funds within 24 months of grant award	Homes for Good continues to receive high performer status
Expend all capital funds within 48 months of grant award	
Comply with the financial reporting requirements of asset management	
Comply with the new PHAS requirements (when published) to continue to receive high performer status	
Submit all PHAS reports within required timelines	
Meeting all capital fund, financial reporting, and PHAS reporting requirements	



**Goal 3 Objective: Improve community quality of life and economic vitality**

<b>Indicator</b>	<b>FY20 Progress</b>
Creation of a Housing Liaison position that will provide education and advocacy to persons searching for housing. Once housed, the Housing Liaison's continued education and advocacy supports will increase housing stability	Homes for Good Housing Liaison has assisted over 100 participants in challenges related to lease up with their Housing Choice Voucher program and has implemented participant and partner education related to housing navigation.
Continue to encourage and promote resident involvement in the Resident Advisory Board by maintaining and expanding the number of representatives from public and assisted housing, as well as the Section 8 program	The Resident Advisory Board (RAB) continues to be actively engaged in the annual plan process and includes members from all PHA subsidy programs.
Enhance the customer service experience across agency programs by simplifying and aligning processes, providing access to services staff and by connecting participants to needed resources in the community	
Enhance resident and agency communication through Resident Newsletters, improved website access, email communication and social media	All communities continue to receive a monthly or quarterly residential newsletter.
Annually monitor income levels by development and provide targeted support to deconcentrate poverty. Bring higher income PH households into lower income developments and vice versa, if necessary	Homes for Good continues to monitor deconcentration strategies and use of preferences to meet deconcentration goals.
Continue giving preferences to elderly/disabled applicants at Parkview Terrace, Veneta Villa, Cresview Villa, Riverview Terrace, McKenzie Village (one-bedroom units), Lindeborg Place, and Laurelwood Homes (one-bedroom units)	

**Goal 4 Objective: Promote self-sufficiency and asset development of households served through public and assisted housing as well as the Section 8 homeownership program**

<b>Indicator</b>	<b>FY20 Progress</b>
Expand access to the Family Self-Sufficiency (FSS) program to reach enrollment of 200 households or more	Homes for Good Family Self-Sufficiency program currently has 149 households enrolled
Maintain a minimum representation of 15 community services agencies on the Family Self-Sufficiency Advisory Board	and has increased participation on the FSS Advisory Board to over 18 community partners.
Continue promotion of the FSS program through annual mailings of FSS informational brochures to all Section 8 and Public Housing residents	FSS information is included in all HCV and PH intake processes, as well as annual mailings with the annual packet.
Assist a minimum of two FSS participants a year in purchasing a home	FSS has assisted 3 participants to purchase homes this year
Assist a minimum of ten FSS participants in opening an Individual Development Account (IDA) for a down payment on a home	FSS has assisted 11 residents to open IDA's.



**Goal 5 objective: To provide decent, safe and sanitary housing for very low-income families while maintaining their rent payments at an affordable level**

Indicator	FY20 Progress
Complete the Rent Assistance Demonstration construction and sale of scattered site homes	Homes for Good has broken ground on the RAD new construction and has begun the sale of the scattered site homes.
Focus preservation efforts communicating with local, state and national funders to help preserve affordable housing opportunities	
The Landlord Liaison continues with community engagement, providing routine educational seminars for landlords and supportive service organizations. Expansion of classes include courses specifically focused on housing quality standard guidelines, thus giving landlords the education and tools needed to prepare for successful housing inspections under HUD requirements	The Landlord Liaison continues to engage community partners and landlords in ongoing education and support. Publication of a quarterly landlord newsletter in in place.
Partnered with NEDCO to provide zero interest loans for security deposits to Section 8 and VASH families	In partnership with DevNW (previously NEDCO), Homes for Good was awarded \$50,000 from Meyer Memorial Trust to expand access to zero interest loans for security deposits for Section 8 and VASH families. These funds will become available to participants this year and will continue to be accessible through a revolving fund.

**Goal 6 objective: To promote a housing program that maintains quality service and integrity while providing an incentive to private property owners to rent to very low-income families**

Indicator	FY20 Progress
Increase success of Section 8 participants, particularly those coming out of homelessness or transitioning from permanent supportive or transitional housing through engagement with the Housing Liaison	The Housing Liaison and Landlord Liaison have increased support for participants and landlords with the goal of increasing the success rate of HCV participants.
Grown the Landlord Liaison offerings of support for landlords through continuous communication, trainings and sharing resources	
Awarded funding to provide monetary incentives to landlords who agree to rent to persons with high housing barriers	
Maintain a professional working relationship with landlords/owners in our community through education and seminars on the Section 8 program	The Housing Liaison has initiated a quarterly Housing Navigator meetup to support local Housing Navigators in increasing the success of their participants who are seeking to lease up with their Section 8 voucher and is in the process of initiating a lease up support group to help participants in building their housing portfolio, searching for housing and leasing up in available units.
Monitor the payment standards and area rents on the private market to keep Section 8 families' portion of rent affordable and allow the Agency to serve the same number of families as in previous years.	A rent study was completed for the 2020 Fair Market Rents. Homes for Good received a 12% increase to the FMRs, which directly impact the Payment Standards utilized by those receiving tenant-based subsidies. This increase will expand housing stock (will now be able to qualify for units they once could not afford) and the dollar amount (more funds to each household) of assistance Homes for Good provides.
A Homes for Good staff member serves on the board for the local Rental Owners association	The Rent Assistance Division Director, Beth Ochs continues to serve on the board of the Rental Owner's Association. Various staff members also attend the general monthly membership meeting.

## Updated Attachment C.3 Resident Advisory Board (RAB) Comments

### RAB Comments:

RAB wanted to see a statement of diversity, equity, inclusion within the ACOP and Administrative Plan because they are fundamental policy documents for the largest Agency programs.

### Homes for Good Response:

Homes for Good will includes the below statement in both the ACOP and Administrative Plan:

*Diversity, equity and inclusion are core values of Homes for Good and we recognize the history of oppression that has resulted in ongoing disparities in many communities, specifically in housing. As a steward of community resources, addressing systematic racism and other forms of discrimination of underrepresented groups is a fundamental function in our efforts to fulfill our mission and serve our community.*

*We strive to create an equitable and inclusive environment where all groups have access to the resources and opportunities essential to fulfilling their potential for success and where difference in life outcomes are not predicated on the basis of race, class or other elements of identity.*

*We understand our obligation to thoughtfully include and engage individuals and communities who have been historically excluded and we recognize that embracing diversity, equity and inclusion will strengthen our decision making, systems and processes in the best interest of employees and the individuals and families we serve.*

*The provisions of these policies shall be applied equally to all applicants and participants regardless of age, color, creed, disability, family status, gender identity, marital status, national origin, political affiliation, race, religion, sex, sexual orientation, or source of income,*

*All references in these policies designate all genders and gender identities.*

Section	Previous Policy	Proposed Policy	Required Change	Impact
ACOP 3-III.F. PROHIBITION AGAINST DENIAL OF ASSISTANCE TO VICTIMS OF DOMESTIC VIOLENCE, DATING VIOLENCE, SEXUAL ASSAULT, OR STALKING	Homes for Good will request in writing that an applicant wishing to claim this protection must notify Homes for Good within 14 business days.	The PHA will request in writing that an applicant wishing to claim this protection notify the PHA within 14 calendar days.	No	Makes response periods more consistent throughout.
<b>RAB Comments:</b>  14 calendar days is not very much time and I don't think that it should be shortened from what it is now.				
<b>Homes for Good Response:</b>  14 calendar days are used elsewhere in this section and throughout the ACOP as a standard response period. For consistency that benefits both residents and staff, we will change it to 14 calendar days.  This time period is how long applicants have to claim this protection, not to provide all documentation.				

<p>ACOP 5-I.B. DETERMINING UNIT SIZE</p>	<p>Homes for Good will assign one bedroom for each two persons within the household, except in the following circumstances:</p> <p>Persons of the opposite sex (other than spouses, and children under age 5) will not be required to share a bedroom.</p> <p>Persons of different generations will not be required to share a bedroom. Different generation is defined as a difference of 8 years or more.</p> <p>Minors age 16 or more will be assigned their own bedroom.</p>	<p>The head of household, including the spouse or co-head, will be allocated one bedroom.</p> <p>All other household members will be based on two (2) persons per bedroom, without regard to gender or age.</p> <p>Live-in aides will be allocated a separate bedroom. Family members of a live-in aide will not be considered when determining family unit size.</p>	<p>No</p>	<p>Align with Section 8 HCV occupancy standards and appropriately house families.</p>
<p><b>RAB Comments:</b></p> <p>The new standards are too basic and don't consider the impact of children of opposite genders with large age differences sharing rooms. Members expressed concern regarding potential impact to those on the current waiting lists and current residents waiting to transfer to a larger bedroom size.</p>				
<p><b>Homes for Good Response:</b></p> <p>Homes for Good wants to appropriately house families in a consistent way across programs. The Fair Housing Council of Oregon recommends simple occupancy limit of 2 persons per bedroom with 1 additional allowed. It is illegal to say that boys and girls cannot share a bedroom or to indicate where occupants should sleep in a unit. While our current policy does not require sex, generational, and age differences to be in different bedrooms, it does say that we are assigning bedrooms, which is not consistent with the recommended best practice.</p> <p>Any household on the transfer list prior to the end of FY20 (September 30, 2020) will be subject to the prior occupancy standards, as long as there are no additions or removals from the household while they are waiting on the transfer list. New admissions to Public Housing will be subject to new occupancy standards and will be notified in the next applicant communication that they receive.</p>				

ACOP 10-II.C. STANDARDS FOR PETS	<p>Residents may own a maximum of 2 pets, only 1 of which may be a dog or cat.</p> <p>Residents may have 1 guinea pig, hamster, rabbit or gerbil.</p> <p>In the case of fish, residents may keep no more than can be maintained in a safe and healthy manner in a tank holding up to 20 gallons. Such a tank or aquarium will be counted as 1 pet.</p>	<p>Residents may own a maximum of 2 pets, only 1 of which may be a dog. In the case of fish, residents may keep no more than can be maintained in a safe and healthy manner in a tank holding up to 10 gallons. Such a tank or aquarium will be counted as 1 pet.</p>	No	Simplified pet rules are easier to understand and enforce
<p><b>RAB Comments:</b></p> <p>It's weird that a fish tank counts as a pet.</p>				
<p><b>Homes for Good Response:</b></p> <p>The idea behind a fish tank being a "pet" is that multiple small fish are allowed as long as they can be kept safely and in a healthy manner in the allowed tank size, rather than dictating a maximum number of fish. We do want to consider a fish tank a pet so that the pet rules will apply concerning keeping the pet in a sanitary manner and being responsible for any damage caused (a leaking tank that causes water damage, for example).</p>				



ACOP 10-II.D. PET RULES	Pets must be maintained within the resident's unit. When outside of the unit (within the building or on the grounds) dogs and cats must be kept on a leash, carried and/or under the immediate control of the resident or other responsible individual at all times.	Pets must be maintained within the resident's unit. When outside of the unit (within the building or on the grounds) dogs and cats must be kept on a leash or carried. They must be under the control of the resident or other responsible individual at all times.	No	Clarifies that pets outside of the unit must be on a leash.
<b>RAB Comments:</b>  This is really making the leash rules more clear for pets, but it'd be helpful to clear up confusion around pets and assistance animals on leashes.				
<b>Homes for Good Response:</b>  We are publishing a new pet policy, assistance animal policy, and registration forms for both. They are shorter and more plain language than past documents. We will also include resident education in upcoming newsletters.				

Section	Previous Policy	Proposed Policy	Required Change	Impact
3-I.J. GUESTS	A family is allowed a total of 14 overnight guest visits in any 12 month period; this limit applies, whether used by one or several guests.	A resident family must notify the PHA when overnight guests will be staying in the unit for more than 7 days. A guest can remain in the unit no longer than 14 consecutive days or a total of 30 cumulative calendar days during any 12 month period.	No	More effectively tracks overnight guests and prevents individuals from becoming unauthorized occupants.
<b>RAB Comments:</b>  Having to notify Homes for Good of three-day overnight guests is a burden on the tenant. RAB expressed concerns that this would be too severely enforced.				
<b>Homes for Good Response:</b>  We will amend the new policy to keep the current notification requirement of 7 days:  <i>A resident family must notify the PHA when overnight guests will be staying in the unit for more than 7 days. A guest can remain in the unit no longer than 14 consecutive days or a total of 30 cumulative calendar days during any 12 month period.</i>				

IN THE BOARD OF COMMISSIONERS OF THE  
HOMES FOR GOOD HOUSING AGENCY, OF LANE COUNTY OREGON

ORDER 20-30-09-03H

In the Matter of Approving the Submission of  
the PHA FY 2021 Annual Plan

WHEREAS, Homes for Good Housing Agency is required by Section 511 of the Quality Housing and Work Responsibility Act of 1998 (and ensuing HUD requirements) to submit an Annual Plan to HUD.

WHEREAS, Homes for Good Housing Agency is required to submit an Annual Plan for FY 2021.

WHEREAS, HUD requires that Homes for Good work with the Resident Advisory Board (RAB) on the development of the Annual Plan.

WHEREAS, Homes for Good Housing Agency has worked with the RAB since January 2020 to ensure involvement as well as communicated potential changes to all participants to seek additional input.

WHEREAS, HUD requires that the Plan be consistent with the Consolidated Plan.

WHEREAS, the City Manager of Eugene has submitted a Certification by State of Local Official of PHA Plans Consistency with the Consolidated Plan.

WHEREAS, Homes for Good Housing Agency is required to submit the Plan electronically to HUD no later than October 18, 2020, accompanied by a signed Certification of Compliance with PHA Plans and Related Regulations.

NOW IT IS THEREFORE ORDERED THAT: The Annual Plan for the Fiscal Year beginning October 1, 2020 is approved for submission to HUD, and the Chair will complete and sign the Certification of Consistency with PHA Plans and Related Regulations.

DATED this \_\_\_\_\_ day of \_\_\_\_\_, 2020

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Chair, Homes for Good Board of Commissioners



# BOARD OF COMMISSIONERS AGENDA ITEM

**BOARD MEETING DATE:** 09/30/2020

**AGENDA TITLE:** In the Matter of Authorizing the Condominium Declaration for Market District Commons Condominium.

**DEPARTMENT:** Real Estate Development Division

**CONTACT :** Steve Ochs

**EXT:** 2530

**PRESENTER:** Steve Ochs

**EXT:** 2530

**ESTIMATED TIME :** 10 minutes

- ☒ **ORDER/RESOLUTION**
- ☐ **PUBLIC HEARING/ORDINANCE**
- ☐ **DISCUSSION OR PRESENTATION (NO ACTION)**
- ☐ **APPOINTMENTS**
- ☐ **REPORT**
- ☐ **PUBLIC COMMENT ANTICIPATED**

**Approval Signature**

**EXECUTIVE DIRECTOR:**

**DATE:** 9/22/20

**LEGAL STAFF :**

**DATE:**

**MANAGEMENT STAFF:**

**DATE:**



## **HOMES FOR GOOD MEMORANDUM**

**TO:** Homes for Good Board of Commissioners

**FROM:** Steve Ochs, Real Estate Development Director

**AGENDA ITEM TITLE:** ORDER 20-30-09-04H/ In the Matter of Authorizing the Condominium Declaration for Market District Commons Condominiums.

**AGENDA DATE:** September 30, 2020

### **I MOTION**

It is moved the Order be approved which authorizes the Authorized Officer to take such further action and to execute the Condominium Declaration and the creation of the Market District Commons Condominium.

### **II ISSUE**

Board approval is requested for Homes for Good to submit the Market District Commons Condominium plat and declaration for further approval as required by State and local condominium requirements to allow creation of Market District Commons Condominium. The Condominium will consist of one commercial unit, one apartment unit, and common areas to be governed by the condominium homeowner's association.

### **III DISCUSSION**

#### **A. Background/Analysis**

In 2013 the Lane County Board of Commissioners accepted the responses of Homes for Good and Obie Companies to the County's request for proposals for the redevelopment of County owned property on Sixth Avenue and Oak Street in Eugene. In 2013 Homes for good entered into a Lease Option Agreement with the County.

Homes for Good and its development team have been working closely with Obie Companies over the last 7 years to develop a coordinated and thoughtful development plan for the Market District area. The result was Market District Commons which will be 50 affordable units in four stories over ground floor commercial space which is expected to be complete in early October of 2020.

In 2019, Homes for Good and Obie Companies entered into a purchase agreement for Obie Companies to purchase the commercial space on the site as well as a majority of parking spaces on the property as a condominium unit. MD Commons LLC will control the residential condominium unit and be controlling member in the MD Commons Board of Directors.

In order to facilitate the purchase a draft condo plat and condominium declaration was created and negotiated by the parties. The declaration and ground floor page of the plat is attached for review and reference. These documents now need to be submitted to the State of Oregon Real Estate Commission for approval and subsequently approved and recorded with the Lane County Surveyor's



office.

B. Recommendation

Approval of the proposed motion.

C. Timing

Upon Board approval the condominium declaration and plat will be submitted for further approval to allow the creation of Market District Commons Condominium

**IV IMPLEMENTATION/FOLLOW-UP**

None required.

**V ATTACHMENTS**

Attachment A: Declaration Market District Commons Condominiums

Attachment B: Condo Plat Ground Floor

AFTER RECORDING, RETURN TO:

MD Commons LLC  
c/o Housing Authority and Community Services Agency of  
Lane County, doing business as Homes for Good Housing Agency  
177 Day Island Road  
Eugene, OR 97401  
Attention: Jacob Fox

PREPARED BY:

Chresten J. Gram  
Bateman Seidel Miner Blomgren Chellis & Gram, P.C.  
888 SW Fifth Avenue, Suite 1200  
Portland, Oregon 97204

**DECLARATION SUBMITTING MARKET DISTRICT COMMONS CONDOMINIUM  
TO CONDOMINIUM OWNERSHIP**

**MD COMMONS LLC  
Declarant**

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**DECLARATION SUBMITTING  
MARKET DISTRICT COMMONS CONDOMINIUM  
TO CONDOMINIUM OWNERSHIP**

**THIS DECLARATION**, pursuant to the provisions of the Oregon Condominium Act, is made and executed this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by **MD COMMONS LLC**, an Oregon limited liability company (“**Declarant**”).

Declarant proposes to create a leasehold condominium to be known as Market District Commons Condominium, which will be located in the City of Eugene, Lane County, Oregon. The purpose of this Declaration is to submit the property described in Article 2 below to the condominium form of ownership and use in the manner provided by the Oregon Condominium Act.

**NOW, THEREFORE**, Declarant does hereby declare and provide as follows:

**Article 1**

**DEFINITIONS**

When used in this Declaration the following terms shall have the following meanings:

- 1.1 “**Apartment Unit**” means Unit 2 as designated on the attached Exhibit B.
- 1.2 “**Association**” means the association of unit owners established pursuant to Article 14 below.
- 1.3 “**Bylaws**” means the Bylaws of the Market District Commons Condominium Owners Association adopted pursuant to Section 14.4 below and attached hereto as Exhibit C as they may be amended from time to time.
- 1.4 “**Commercial Unit**” means Unit 1 as designated on the attached Exhibit B.
- 1.5 “**Common Elements**” means the General Common Elements and the Limited Common Elements as defined in Articles 5, 6, respectively.
- 1.6 “**Condominium**” means all of the property submitted to the condominium form of ownership by this Declaration.
- 1.7 “**Declarant**” means MD Commons LLC, an Oregon limited liability company, and its successors and assigns.
- 1.8 “**Declaration**” means this Declaration as it may hereafter be amended.
- 1.9 “**Ground Lease**” means that certain Ground Lease pursuant to which the Declarant has leased the land described in Exhibit A from Lane County, a political subdivision of the State of Oregon, for a term of ninety-nine (99) years. A Memorandum of Ground Lease was recorded in the real property records of Lane County, Oregon as Document No. 2019-023455.

1.10 “**Ground Leasehold**” means the leasehold interest held by Declarant in the land described in Exhibit A pursuant to the Ground Lease.

1.11 “**Ground Lessor**” means Lane County Oregon, and its successors and assigns.

1.12 “**Investor**” means Wells Fargo Affordable Housing Community Development Corporation, the Declarant’s investor member, whose address is MAC D1053-170, 301 South College Street, 17th Floor, Charlotte, North Carolina 28288, Attn: Director of Tax Credit Asset Management. The rights granted to Investor herein shall continue so long as Investor is a member of Declarant, or until the end of the Tax Credit Compliance Period under Section 42 of the Internal Revenue Code, as amended, whichever is later.

1.13 “**Mortgage**” and “**Mortgagee**” mean, respectively, a recorded mortgage, trust deed or contract of sale that creates a lien against a unit, and the holder, beneficiary or vendor of such a mortgage, trust deed or contract of sale.

1.14 “**Plat**” means the plat of Market District Commons Condominium recorded simultaneously with the recording of this Declaration.

1.15 “**Regulatory Agreement**” means any use restriction or covenant recorded in the real property records of the county in which the Condominium is located restricting the use of the Apartment Unit to housing for low- and moderate- income households.

1.16 **Incorporation by Reference.** Except as otherwise provided in this Declaration, each of the terms defined in ORS 100.005, a part of the Oregon Condominium Act, shall have the meaning set forth in that section.

## **Article 2**

### **SUBMISSION OF PROPERTY TO CONDOMINIUM STATUTE**

The property submitted to the Oregon Condominium Act by this Declaration is the Ground Leasehold interest owned by the Declarant in the land described on the attached Exhibit A, together with all easements, rights and appurtenances located on, belonging to or used in connection thereto. It is Declarant’s intent that title to all improvements shall remain separate from the land and that fee title to the land described in Exhibit A shall repose entirely in the Ground Lessor.

## **Article 3**

### **NAME OF CONDOMINIUM**

The name by which the Condominium shall be known is “**Market District Commons Condominium.**”

## Article 4

### UNITS

4.1 **General Description of Building.** The Condominium consists of one building containing five stories. The building is of wood frame construction over concrete podium with glass, brick masonry and metal paneling siding and flat membrane roof. The Condominium includes a covered parking area, stormwater facility to drain and discharge stormwater from the roof of the building and the parking lot (the “**Stormwater Facility**”), a parking lot consisting of a total of thirty-seven (37) spaces, and landscaping.

4.2 **General Description, Location and Designation of Units.** The Condominium contains two units, the Apartment Unit and the Commercial Unit. The designation, location, description of boundaries and area in square feet of each unit are shown on the Plat and the attached Exhibit B.

4.3 **Boundaries of Units.** Each unit shall be bounded by its perimeter and bearing walls, floors, ceilings, window frames, doors and door frames, trim and the exterior surface of windows. Each unit shall also include any exterior decks. Each unit shall include all lath, furring, wallboard, plasterboard, plaster, paneling, tiles, wallpaper, paint, finished flooring and any other materials constituting any part of its finished surfaces, except those portions of the walls, floors or ceilings that materially contribute to the structural or shear capacity of the Condominium. All other portions of the walls, floors or ceilings shall be a part of the Common Elements. In addition, each unit shall include the following: (a) all spaces, nonbearing interior partitions, window glazing and screens, doors and door frames and all other fixtures and improvements within the boundaries of the unit; and (b) all outlets of utility and communications service lines, including but not limited to power, light, gas, hot and cold water, heating, refrigeration, air conditioning, waste disposal, security, cable television and telephone, within the boundaries of the unit, but shall not include any part of such lines or ducts themselves. Notwithstanding anything to the contrary herein and for avoidance of doubt, the Apartment Unit includes the roof terrace and the elevator shaft extending through the roof and the stairwell (airspace and improvements) located within the covered parking area.

## Article 5

### GENERAL COMMON ELEMENTS

The general common elements (“**General Common Elements**”) consist of all portions of the Condominium that are not part of a Unit or a Limited Common Element, including, but not limited to, the following:

5.1 The land, grounds, mechanical and service areas serving the entire building, including, without limitation, the Stormwater Facility, the Exterior Improvements as defined in Section 8.1(d), and the shared building electrical room (the “**Building Electrical Room**”).

5.2 Pipes, ducts, flues, chutes, conduits, wires and other utility and communications installations to their outlets.

5.3 Those parking spaces designated as General Common Elements on the Plat.

5.4 The roof, foundations, bearing and shear walls, perimeter walls, any common walls added to separate units, beams, columns and girders to the interior surfaces thereof.

5.5 All other elements of the building and the Condominium necessary or convenient to their existence, maintenance and safety, or normally in common use, except as may be expressly designated in this Declaration as part of a Unit or a Limited Common Element.

## **Article 6**

### **LIMITED COMMON ELEMENTS**

The following shall constitute “**Limited Common Elements**,” the use of which shall be restricted to the units to which they pertain:

6.1 The parking spaces designated as “L.C.E. A” and “L.C.E. I” on the Plat shall be Limited Common Elements pertaining to the Apartment Unit.

6.2 The parking spaces designated “L.C.E. B”, “L.C.E. C”, “L.C.E. D”, “L.C.E. E”, “L.C.E. F”, “L.C.E. G”, and “L.C.E. H”, on the Plat shall be Limited Common Elements pertaining to the Commercial Unit.

## **Article 7**

### **ALLOCATION OF UNDIVIDED INTERESTS IN COMMON ELEMENTS**

Each unit will be entitled to an undivided ownership interest in the Common Elements determined by the ratio by which the square footage of the particular unit bears to the total square footage of all units combined, as shown on the attached Exhibit B. Each unit’s interest in the Common Elements shall be inseparable from the unit and any conveyance, encumbrance, judicial sale, or other transfer, voluntary or involuntary, of an undivided interest in the Common Elements shall be void unless the unit to which that interest is allocated is also transferred.

## **Article 8**

### **COMMON PROFITS AND EXPENSES; VOTING**

8.1 **Allocation of Common Expenses.** Except as otherwise set forth below, the common profits and common expenses of the Condominium shall be allocated to the owner of each unit according to the ratio by which the square footage of the particular unit bears to the total square footage of all units combined. Except upon termination of the Condominium or as otherwise provided in the Bylaws with respect to damage, destruction or condemnation, any such common profits shall be used solely for the purpose of maintaining, repairing and replacing the Common Elements or for other expenses or reserves of the Association.

(a) **Limited Common Elements.** The Association shall operate, maintain, repair, and replace the Limited Common Elements. The costs of operating (except as provided in

Section 8.1(c), below), maintaining, repairing, or replacing the Limited Common Elements shall be allocated as follows: (i) as to the Limited Common Elements set forth in subsection 6.1, to the owner of the Apartment Unit, and (ii) as to the Limited Common Elements is set forth in subsection 6.2, to the owner of the Commercial Unit. The costs incurred by the Association for operating, maintaining, repairing, or replacing the Limited Common Elements identified in Sections 6.1 and 6.2 includes, by way of illustration, the cost to sweep or remove snow from the parking area, to restripe the parking area, to re-seal and re-coat the parking area, and to repave the parking area. The owner of the Commercial Unit shall be responsible for 91.4% of the total of such costs (32/35) and the owner of the Apartment Unit shall be responsible for 8.6% of the total of such costs (3/35). In the interest of efficiency, the Association shall also operate, maintain, repair, and replace the General Common Element parking spaces designated as General Common Elements on the Plat and all paved accessways of the Condominium and allocate the cost as provided in this subparagraph (a) for the Limited Common Elements. For clarity, the Association's rights and obligations with respect to the Limited Common Elements are limited to operating, maintaining, repairing and replacing the Limited Common Elements. Any additions or improvements to, or alterations of, the Limited Common Elements, including, without limitation, parking and access configuration, shall be subject to approval in writing by the owner of the Commercial Unit as provided in Section 3.6 of the Bylaws.

(b) **Canopies and Awnings.** The owner of the Commercial Unit shall be responsible for maintaining any exterior awnings and non-structural canopies adjacent to the Commercial Unit in a clean and good condition. The owner of the Apartment Unit shall be responsible for maintaining any exterior awnings and non-structural canopies adjacent to the Apartment Unit in a clean and good condition.

(c) **Utilities and Common Services.** Except as expressly provided otherwise herein, the cost of commonly billed utilities and other common services, if any, shall be allocated based upon relative use as established by submeters or as reasonably determined by the Board of Directors (as such term is defined in the Bylaws). The cost of utility service (e.g., water and electricity) for the Limited Common Elements, the parking spaces designated as General Common Elements on the Plat, and the Exterior Improvements as defined in Section 8.1(d), shall be allocated fifty percent (50%) to the owner of the Apartment Unit and fifty percent (50%) to the owner of the Commercial Unit. Each unit owner will be responsible for all separately billed utility and other services to its unit.

(d) **Exterior Improvements.** The Board of Directors of the Association shall operate, maintain, repair, and replace all surface improvements on the land, other than the building, which are not part of a Unit or a Limited Common Element including, without limitation, landscaping, sidewalks, curbing, exterior lighting, the Stormwater Facility, and the bridge over the Stormwater Facility (collectively, the "**Exterior Improvements**") and shall be responsible for utility service to the Exterior Improvements. The cost of maintaining, repairing, and replacing the Exterior Improvements shall be allocated fifty percent (50%) to the owner of the Apartment Unit and fifty percent (50%) to the owner of the Commercial Unit. It is acknowledged that the cost to operate, maintain, repair, and replace the parking spaces designated as General Common Elements on the Plat shall be allocated as provided in Section 8.1(a). The cost of providing utility service to the Exterior Improvements shall be allocated as provided in Section 8.1(c). For clarity, the Association's rights and obligations with respect to the Exterior Improvements are limited to

operating, maintaining, repairing and replacing the Exterior Improvements. Any additions or improvements to, or alterations of, the Exterior Improvements, including, without limitation, parking and access configuration, shall be subject to approval in writing by the owner of the Commercial Unit as provided in Section 3.6 of the Bylaws. Further the Association shall not modify, close, remove, eliminate or discontinue the use of a General Common Element facility or improvement or portion of the General Common Element landscaping, including, without limitation, any Exterior Improvement, without approval in writing by the owner of the Commercial Unit as provided in Section 3.6 of the Bylaws.

(e) **Ground Floor Building Exterior Maintenance.** The owner of the Apartment Unit shall maintain, repair and replace and at all times keep in good condition and repair and at such owner's cost the ground floor Building exterior (including windows, brick masonry and metal cladding) that is adjacent to the Apartment Unit. The owner of the Commercial Unit shall maintain, repair and replace and at all times keep in good condition and repair and at such owner's cost the ground floor Building exterior (including windows, brick masonry and metal cladding siding) that is adjacent to the Commercial Unit.

(f) **Building Upper Floors Exterior Maintenance and Repair.** The owner of the Apartment Unit shall maintain, repair and replace and at all times keep in good condition and repair and at such owner's cost the upper floors (i.e. floors 2-4) of the Building exterior (but for avoidance of doubt, not the roof).

(g) **Electric Facilities.** Although the Building Electrical Room is a General Common Element and shall be maintained, repaired and replaced by the Association, the owner of the Apartment Unit shall be responsible for maintaining, repairing and replacing the electrical equipment located in the Building Electrical Room that serves the Apartment Unit at such owner's cost, and the owner of the Commercial Unit shall be responsible for maintaining, repairing and replacing the electrical equipment located in the Building Electrical Room that serves the Commercial Unit at such owner's cost.

(h) **Disputes.** If any unit owner objects to an allocation of expense by the Board of Directors, such dispute shall be resolved by mediation or arbitration as described in the Bylaws.

8.2 **Allocation of Voting Rights.** Each unit owner shall be entitled a vote in the affairs of the Association and for the purposes of this Declaration as follows:

Apartment Unit:	Four (4) votes
Commercial Unit:	One (1) vote

## **Article 9**

### **SERVICE OF PROCESS**

The designated agent to receive service of process in cases provided in subsection (1) of ORS 100.550 is named in the Condominium Information Report which has been filed in accordance with ORS 100.250(1)(b).



## Article 10

### **USE OF PROPERTY**

Each unit is to be used for the purposes set forth below. Additional limitations on use are contained in the Bylaws and the rules and regulations adopted pursuant to the Bylaws. Each unit owner shall be bound by each of these documents. A unit owner shall not take or suffer any action that is prohibited by the negative covenants of the Ground Lease when the obligation to refrain from taking or suffering such action is by its nature imposed on the party in possession of the property.

10.1 **Apartment Unit.** The Apartment Unit shall be used primarily for residential rental apartment purposes. For avoidance of doubt, some or all of the ground floor of the Apartment Unit may be used for any retail, commercial or professional purposes permitted by applicable zoning regulations; provided, however, that the ground floor of the Apartment Unit may not be used for any use included within Exhibit D (Prohibited Uses).

10.2 **Commercial Unit.** The Commercial Unit shall be used for any retail, commercial or professional purposes permitted by applicable zoning regulations; provided, however, that the Commercial Unit may not be used for any use included within Exhibit D (Prohibited Uses).

## Article 11

### **MAINTENANCE OF COMMON ELEMENTS**

Except as otherwise provided in Section 8.1, the necessary work to maintain, repair or replace the Common Elements shall be the responsibility of the Board of Directors of the Association and shall be carried out as provided in the Bylaws. Each unit owner shall be responsible for maintaining, repairing and replacing any utility or communication lines that exclusively serve that unit.

## Article 12

### **EASEMENTS**

12.1 **In General.** Each unit has an easement in and through each other unit and the Common Elements for all support elements and utility, wiring, heat, plumbing and service elements, and for reasonable access thereto, as required to effectuate and continue proper operation of the Condominium, including, without limitation, easements as required for the electrical wiring and plumbing for each unit and an easement for HVAC equipment in the exterior walls of the building and communication dishes and antennas on the roof. The specific mention or reservation of any easement in this Declaration does not limit or negate the general easement for Common Elements reserved by law. Each unit owner has an unrestricted right of ingress and egress to his or her unit. This right is perpetual and passes with the ownership of the unit.

12.2 **Encroachments.** Each unit and all Common Elements shall have an easement over all adjoining units and Common Elements for the purpose of accommodating any present or future encroachment as a result of engineering errors, construction, reconstruction, repairs, settlement,

shifting or movement of any portion of the property, or any other similar cause, and any encroachment due to building overhang or projection. There shall be valid easements for the maintenance of the encroaching units and Common Elements so long as the encroachments shall exist, and the rights and obligations of owners shall not be altered in any way by the encroachment. This provision does not relieve a unit owner of liability in the case of willful misconduct of the unit owner or relieve Declarant or any contractor, subcontractor or materialman from any liability as a result of failure to adhere to the Plat. The encroachments described in this Section 12.2 shall not be construed to be encumbrances affecting the marketability of title to any unit.

12.3 **Granting of Easements by Association.** Pursuant to ORS 104.405(5) and subject to the requirements of ORS 100.405(6), the Association may grant, execute, acknowledge and deliver on behalf of the unit owners leases, easements, rights-of-way, licenses and similar interests affecting the Common Elements and consent to vacation of roadways within and adjacent to the Condominium. Any such instrument shall be executed by the chairperson and secretary of the Association. No such interest may be granted with regard to a Limited Common Element unless the owners and Mortgagees of the units having the right to use the Limited Common Element (and the Investor for Limited Common Elements pertaining to the Apartment Unit) consent to and join in the instrument granting the interest.

12.4 **Right of Entry.** The Board of Directors of the Association, managing agent, manager or any other person authorized by the Board of Directors shall have the right to enter any unit and Limited Common Element in the case of an emergency originating in or threatening such unit or other condominium property, whether or not the owner is present at the time. Such persons shall also have the right to enter any unit and Limited Common Element for the purpose of performing installations, alterations or repairs to any Common Element, exterior window washing, and for the purpose of inspection to verify that the unit owner is complying with the restrictions and requirements described in this Declaration and the Bylaws, provided that requests for entry are made in advance (at least seventy-two (72) hours' prior written notice to the owner of the Commercial Unit to allow time to provide notice to any tenant) and that such entry is at a time convenient to the owner.

12.5 **Easements for Declarant.** Declarant and Declarant's agents, successors and assigns shall have an easement over and upon the Common Elements as may be reasonably necessary for the purpose of completing or making repairs to existing structures and for the purpose of discharging any other obligation of Declarant or exercising any other special Declarant right, whether arising under the Oregon Condominium Act or reserved in this Declaration or the Bylaws. For a period of fifteen (15) years following recording of this Declaration, Declarant and Declarant's members, managers and their successors, agents and designees shall have a right to inspect the Common Elements of the Condominium and the Association's records regarding inspections and maintenance of the Condominium. Such persons shall have the right to enter units for the purpose of performing such inspections, provided that requests for entry are made in advance (at least seventy-two (72) hours' prior written notice to the owner of the Commercial Unit to allow time to provide notice to any tenant) and that such entry is at a time convenient to the owner.

12.6 **Generator Easement.** Without limiting the above, the owner of the Apartment Unit shall have a perpetual and irrevocable easement to locate, maintain, repair and replace a

generator (the “**Generator**”) within the landscaping area adjacent to the Stormwater Facility in a location mutually acceptable to the unit owners. The owner of the Apartment Unit shall (i) screen and maintain the Generator in good condition and repair and at such owner’s cost, (ii) remove the Generator when it is no longer in use and repair the landscaped area, and (iii) indemnify, defend and hold the owner of the Commercial Unit harmless against any claim or loss in connection with the Generator. The owner of the Commercial Unit shall have the right to require relocation of the Generator, provided that the owner of the Commercial Unit pays all costs of such relocation.

## **Article 13**

### **MORTGAGEES AND INVESTOR**

13.1 **Approvals Required.** In addition to any other or greater approvals required by Oregon law, this Declaration or the Bylaws, the prior written approval of all of the holders of Mortgages of units in the Condominium and Investor must be obtained for the following:

- (a) Abandonment, termination, or revocation of the Condominium regime.
- (b) Any change in the pro rata interest or obligations of any individual unit for (a) purposes of levying assessments or charges or allocating distributions of hazard insurance proceeds or condemnation awards, or (b) determining the pro rata share of ownership of each unit in the Common Elements.
- (c) The partition or subdivision of any unit.
- (d) Abandonment, partition, subdivision, encumbrance, sale or transfer of the Common Elements. The granting of easements for public or private utilities or facilities or for other public purposes consistent with the intended use of the Common Elements by the condominium project shall not be deemed a transfer within the meaning of this clause.
- (e) Use of hazard insurance proceeds for losses to any condominium property, whether to units or to Common Elements, for other than the repair, replacement or reconstruction of such improvements, except as provided by statute in cases of substantial loss to the units and/or Common Elements of the condominium project.
- (f) Any amendment of this Declaration, the Bylaws or the Plat.

13.2 **Notice to Investor and First Mortgagees.** The Association shall provide Investor and any first Mortgagee timely written notification from the Association of the following: (a) any default in the performance by the owner of a Mortgaged unit of any obligation under this Declaration, the rules and regulations or the Bylaws that is not cured within sixty (60) days; (b) any condemnation loss or casualty loss that affects either a material portion of the Condominium or any unit securing its Mortgage; (c) any lapse, cancellation, or material modification of any insurance policy maintained by the Association; and (d) any proposed action that would require the consent of a specified percentage of eligible Mortgagees or the Investor. Any first Mortgagee affecting the Unit of the defaulting Owner, and the Investor as to Apartment Unit, shall be entitled to receive an additional notice that the defaulting Owner has failed to cure such default, and such first Mortgagee or Investor, as applicable, shall have ninety (90) days after the receipt of said

additional notice to cure any such default, or, if such default cannot be cured within ninety (90) days, to diligently commence curing within such time and diligently cure within a reasonable time thereafter. The first Mortgagee and the Investor may pay any sum or take any other action reasonably necessary to cure any default of the Owner hereunder with the same effect as cure by the Owner itself.

13.3 **Amendment of this Article.** This article may not be amended without the prior written consent of Investor and all holders of Mortgages on units in the Condominium.

## **Article 14**

### **ASSOCIATION OF UNIT OWNERS**

14.1 **Organization.** Upon the recording of this Declaration an association of unit owners shall be organized to serve as a means through which the unit owners may take action with regard to the administration, management and operation of the Condominium. The name of this association shall be "Market District Condominium Owners Association," and the Association shall be an Oregon nonprofit corporation.

14.2 **Membership; Board of Directors.** Each unit owner shall be a member of the Association. The affairs of the Association shall be governed by a Board of Directors as provided in the Bylaws.

14.3 **Powers and Duties.** The Association shall have such powers and duties as may be granted to it by the Oregon Condominium Act, including each of the powers set forth in ORS 100.405(4), together with such additional powers and duties afforded it by this Declaration or the Bylaws.

14.4 **Adoption of Bylaws, Declarant Control of Association.** Upon the execution and the recording of this Declaration, Declarant shall adopt Bylaws for the Association, which Bylaws are attached as Exhibit D. Declarant specifically reserves the right to control the Association by appointing the interim directors of the Association until the organizational and turnover meeting of the Association has been held and the unit owners have elected regular directors as provided in Sections 2.2 and 3.3 of the Bylaws. In addition, Declarant shall have the right to consent to any amendment to the Declaration or the Bylaws as provided in Section 15.2 below and Section 9.2 of the Bylaws, and a weighted vote in the Association as provided in Section 8.2 above.

#### **14.5 Leasehold Condominium / Expiration of Leases.**

(a) **Leasehold Condominium.** The Condominium is a leasehold condominium consisting of the Ground Leasehold. The Ground Leasehold estate exists for a period of ninety-nine (99) years. The Board of Directors may not terminate the Ground Lease without the consent of both the Owner of the Apartment Unit and the owner of the Commercial Unit.

(b) **Conveyance of Units, Rent.** Declarant shall initially retain title to the Apartment Unit and shall convey the Commercial Unit, and all subsequent conveyance of units, shall be by a deed pursuant to which the grantees will acquire an undivided interest in the Ground Leasehold and assume an obligation to pay rent or any other payment due under or necessary to

comply with the Ground Lease as a member of the Association, allocated in the manner of common expenses set forth in Article 7 above. The Association has the power to assess the owners for the payments due under or necessary to comply with the Ground Lease with respect to such owner's unit only. In the event the Association fails to timely pay rent or any other payment due under or necessary to comply with the Ground Lease, the Ground Lessor is authorized to assess each owner for the portion of such payments attributable to such owner's unit (determined in accordance with the allocation method set forth in Article 7) and the Ground Lessor shall have the power to enforce such assessment, including filing and foreclosing liens. The Ground Lessor's authority shall be limited to assessing an owner for the collection of rent and other amounts owed under the Ground Lease. Notwithstanding anything to the contrary set forth herein or in the By-Laws, no Unit Owner shall have any liability under this Declaration or By-Laws for any action or inaction or default caused by or related to the other Unit Owner's Unit.

(c) **Surrender and Ownership of Improvements.** The Ground Lease provides that on the last day of the term provided in such lease or any extension thereof, or upon termination of such lease, or upon re-entry by the Ground Lessor thereunder, the lessees shall quit and surrender the Ground Leasehold and the improvements therein or thereon to the Ground Lessor. Until termination of the Ground Lease or re-entry by Ground Lessor, the improvements located on or with the Ground Leasehold shall remain property of the lessee.

(d) **Amendment of Ground Lease.** Any amendments to the Ground Lease may and must be approved by the Board of Directors, provided that the Board of Directors may not amend the terms of the Ground Lease without the consent of the owner of the Apartment Unit and the owner of the Commercial Unit.

(e) **Subordination.** The Board of Directors may not agree to subordinate the Ground Lease or this Declaration to any mortgage, trust deed or other lien without the consent of the owner of the Apartment Unit and the owner of the Commercial Unit.

## **Article 15**

### **AMENDMENT**

15.1 **How Proposed.** Amendments to the Declaration shall be proposed by either a majority of the Board of Directors or by any unit owner. The proposed amendment must be reduced to writing and shall be included in the notice of any meeting at which action is to be taken thereon or attached to any request for consent to the amendment.

15.2 **Approval Required.** Except as may otherwise be provided in this Declaration or by the Oregon Condominium Act, this Declaration may be amended if the amendment is approved by all unit owners, and by Mortgagees and Investor to the extent required by Article 13. Any amendment that would limit or diminish any special Declarant rights established in this Declaration or the Bylaws, including, without limitation, any amendment that could unreasonably interfere with the sale, lease or other disposition of units owned by Declarant or that could abridge, modify, eliminate or otherwise affect any right, power, easement, privilege or benefit reserved for Declarant or that would impose any discriminatory charge or fee against Declarant, shall require the written consent of Declarant.

15.3 **Recordation.** The amendment shall be effective upon recordation in the Deed Records of Lane County, Oregon, of the Declaration as amended or of the amendment thereto, certified to by the chairperson and secretary of the Association as being adopted in accordance with this Declaration and the provisions of the Oregon Condominium Act, and approved by the county assessor and the Real Estate Commissioner if such approvals are required by the Oregon Condominium Act.

## **Article 16**

### **SEVERABILITY**

Each provision of this Declaration and the Bylaws shall be deemed independent and severable, and the validity or partial invalidity of any provision shall not affect the validity or enforceability of the remaining part of that or any other provision of this Declaration or the Bylaws.

## **Article 17**

### **APPLICABILITY**

Each unit owner, including Declarant as to any unsold unit, shall be subject to all of the rights and duties assigned to unit owners under the terms of the Declaration and Bylaws. All present and future owners, tenants, subtenants and occupants of units, and all present and future employees, agents, visitors and licensees of unit owners, shall be subject to and comply with the provisions of this Declaration, the Bylaws and all rules and regulations adopted thereunder, as they may be amended from time to time.

## **Article 18**

### **PROHIBITION ON USE OF TAX-EXEMPT BOND PROCEEDS**

At no time prior to January 1, 2034, or the end of the Tax Credit Compliance Period under Section 42 of the Internal Revenue Code, as amended, whichever is longer, shall a unit owner or the Association permit any improvements to, maintenance of, or operation of the Common Elements to be paid for using the proceeds of a grant or loan funded in whole or in part with the proceeds of bonds the interest on which is exempt from Federal income tax under Section 103 of the Internal Revenue Code.



**IN WITNESS WHEREOF**, Declarant has caused this Declaration to be executed as of the day and year first set forth above.

**MD COMMONS LLC,**  
an Oregon limited liability company

By: MD Manager LLC, an Oregon limited liability company, its Managing Member

By: Housing Authority and Community Service Agency of Lane County doing business as Homes For Good Housing Agency, its Member and Manager

By: \_\_\_\_\_  
Jacob Fox, Executive Director

STATE OF OREGON            )  
  )ss.  
County of                    )

The foregoing instrument was acknowledged before me this \_\_\_\_ day of \_\_\_\_\_, 20\_\_ by Jacob Fox, Executive Director of Housing Authority and Community Services Agency of Lane County doing business as Homes For Good Housing Agency, as Member and Manager of MD Manager LLC, an Oregon limited liability company, the Managing Member of MD Commons LLC, an Oregon limited liability company, on its behalf.

\_\_\_\_\_  
Notary Public for Oregon  
My commission expires:  
Commission No.:

**[This space left blank - signatures continue on next page]**

Lane County hereby consents to the Declarant subjecting the Ground Leasehold to the condominium form of ownership.

**LANE COUNTY,**  
a political subdivision of the state of Oregon

By: \_\_\_\_\_  
Its: \_\_\_\_\_

STATE OF OREGON            )  
  ) ss.  
County of Lane                )

This instrument was acknowledged before me this \_\_\_\_ day of \_\_\_\_\_, 20\_\_, by \_\_\_\_\_, as County Administrator of Lane County, Oregon.

\_\_\_\_\_  
Notary Public of Oregon  
My Commission Expires:\_\_\_\_\_

The foregoing Declaration is approved this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

**ASSESSOR AND TAX COLLECTOR FOR LANE  
COUNTY**

By:\_\_\_\_\_

The foregoing Declaration is approved pursuant to ORS 100.110 this \_\_\_\_ day of \_\_\_\_\_, 20\_\_ and in accordance with ORS 100.110(8), this approval shall automatically expire if this Declaration is not recorded within one (1) year from this date.

**OREGON REAL ESTATE COMMISSIONER**

By:\_\_\_\_\_

Michael Hanifin

## EXHIBIT A

LOTS 5 AND 8, BLOCK 2, SKINNER'S DONATION TO LANE COUNTY, AS PLATTED AND RECORDED IN BOOK "A", PAGE 122, LANE COUNTY OREGON PLAT RECORDS, IN LANE COUNTY, OREGON.

TOGETHER WITH THAT APPURTENANT EASEMENT FOR ACCESS DESCRIBED AS FOLLOWS:

BEGINNING AT THE NORTHEAST CORNER OF LOT 5, BLOCK 2 OF SKINNERS DONATION TO LANE COUNTY AS PLATTED AND RECORDED IN BOOK A, PAGE 122 LANE COUNTY OREGON DEED RECORDS, SAID POINT BEING ON THE WEST MARGIN OF OAK STREET, 33.0' WESTERLY OF, WHEN MEASURED AT RIGHT ANGLES TO, THE CENTERLINE OF OAK STREET; THENCE ALONG SAID WEST MARGIN NORTH 00°01'54" WEST 10.50 FEET; THENCE LEAVING SAID WEST MARGIN AND RUNNING PARALLEL TO THE NORTH BOUNDARY OF SAID LOT 5, BLOCK 2 NORTH 89°53'46" WEST 161.09 FEET TO A POINT ON THE EAST MARGIN OF A NORTH-SOUTH 14.0 FOOT PUBLIC ALLEY BISECTING SAID BLOCK 5; THENCE ALONG THE EAST MARGIN OF SAID ALLEY SOUTH 00°00'57" EAST 10.50 FEET TO THE NORTHWEST CORNER OF SAID LOT 5, BLOCK 2; THENCE LEAVING SAID EAST MARGIN AND RUNNING ALONG THE NORTH BOUNDARY OF SAID LOT 5, BLOCK 2 SOUTH 89°53'46" EAST 161.09 FEET TO THE POINT OF BEGINNING, ALL IN LANE COUNTY OREGON.

## **EXHIBIT B**

### **Unit Square Footages and Undivided Interests**

<b>Unit</b>	<b>Square Footage</b>	<b>Undivided Interest</b>
1	6,833	12.6%
2	47,407	87.4%
Total	54,240	100.00%

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### **NOTICE**

**THE SQUARE FOOTAGE AREAS STATED IN THIS DECLARATION AND THE PLAT ARE BASED ON THE BOUNDARIES OF THE UNITS AS DESCRIBED IN THIS DECLARATION AND MAY VARY FROM THE AREA OF UNITS CALCULATED FOR OTHER PURPOSES.**

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**EXHIBIT C**

**BYLAWS**

## EXHIBIT D

### PROHIBITED USES

- (a) manufacturing, distilling, refining, smelting, agricultural or mining operation;
- (b) bowling alley;
- (c) mortuary or funeral home;
- (d) food establishments which are open before 6AM or after 11PM;
- (e) adult book/film store or facility for the sale or distribution of pornographic or sexually explicit materials or sex paraphernalia or other establishment selling or exhibiting “obscene” material;
- (f) establishment which exhibits, either live or by other means, to any degree, nude or partially clothed dancers or wait staff, including an adult motion picture facility or a facility for sale of sexual services;
- (g) gambling facility or operation, including: off-track or sports betting parlor; table games such as blackjack or poker; slot machines, video poker/blackjack/keno machines or similar devices; or bingo hall, provided that incidental sales of lottery tickets and similar items from a retail store in accordance with applicable law is permitted;
- (h) vehicle repair facility;
- (i) gun or ammunition shop;
- (j) tattoo or piercing parlor;
- (k) retail laundromat or on-premises dry cleaners (but drop-off facilities for dry cleaners is permitted);
- (l) all-night convenience store, any other 24-hour establishment or any establishment of any kind which is open for business between the hours of 11 PM and 6AM (provided, however, that the foregoing shall not prohibit an establishment such as a grocery store or a food mart convenience store that is open for business between 6AM and 11PM, the principal business for which is the sale of food and/or grocery items, provided that the incidental sale of alcohol and/or alcoholic beverages for off-site consumption except for beer and wine shall be prohibited);
- (m) any use which uses environmentally hazardous materials regulated under applicable law (other than those used in small quantities, which are permitted under applicable environmental laws in the ordinary course of business of a permitted office, or retail use);
- (n) any use that increases the insurance costs of the Condominium or would constitute a health or safety hazard as determined by the city of Eugene (the “**City**”) to the residential tenants of the Condominium;
- (o) pawn shop pawn brokers, surplus store, pawn shop, liquidation/flee market, secondhand store (unless operated by Goodwill or a similar nonprofit operator), bankruptcy sales store, car title lender (which, for purposes of this limitation, will not include auto loans made by a state or federally chartered bank or thrift), or any similar type of lending activity;
- (p) liquor store or any other retail sales establishments whose primary sales product is alcoholic beverages;
- (q) Intentionally Deleted;
- (r) massage parlor (but not including day spas, yoga, personal training or related studios, or franchised hourly massage facilities which are not open for business between the hours of 11 PM and 6AM), or suntan parlors/facilities or hot tub parlors/facilities;
- (s) drug or alcohol treatment facilities or clinics;



- (t) a check cashing, personal loan, or payday loan business (provided, however, a bank, credit union, savings and loan or similar financial institution is permitted);
- (u) bail bonds business;
- (v) escort service or dating bureau;
- (w) parole, juvenile detention or similar services;
- (x) facility involving sale or distribution of drugs or drug paraphernalia associated with drugs or controlled substances, regardless of whether such substances may be legal to sell or distribute under the laws of the state of Oregon (including medical and recreational marijuana/edible stores or smoke shops, medical marijuana, medical cannabis or any constituent cannabinoids such as THC (this limitation applies broadly, regardless of whether the activity is conducted by collectives, collective caregivers, co-ops, growers, or any other entity or organization), headshops, or any other Federally regulated controlled substance (but a licensed pharmacy operated by a licensed pharmacist in accordance with all applicable health, safety, retention and distribution requirements is permitted);
- (y) any use that is illegal or otherwise violates any applicable local, state or federal law, statute, ordinance, rule or regulation;
- (z) Any use which generates noise or sound that interferes with the quiet enjoyment of tenants in the Apartment Unit or is otherwise objectionable due to intermittence, beat, frequency, shrillness or loudness, or any use which emits an obnoxious odor, noise or sound which can be heard or smelled outside of the exterior walls of the Commercial Unit (provided, however, that odors resulting from cooking and food preparation in restaurants shall not be deemed to violate this restriction as long as such odors are vented through exhaust fans to the outside as required under applicable law; and further provided that the foregoing shall not prohibit an arcade/video-game establishment that is open for business before 11PM, subject to the noise and odor restrictions set forth hereinabove and the prohibitions set forth in section (dd) hereof in the event that such establishment is included within a restaurant);
- (aa) Any distillation or refinery facility including, but not limited to, a micro-brewery where product is brewed;
- (bb) Storage and/or sale of any noxious, hazardous, toxic, caustic, explosive or corrosive fuel, gas or other substance, with the exception of those materials stored and/or sold in the normal course of business, providing that the same are stored in accordance with applicable laws, ordinances and manufacturers' requirements so that such substances are not permitted to be present above levels permitted by all applicable laws;
- (cc) Any use which generates fire, explosion, or other damaging or dangerous hazard, including, but not limited to, the storage or sale of explosives, fireworks or ammunition, or any use involving the sale or distribution of any flammable liquids, gases or other hazardous materials; (dd) any store the principal business of which is the sale of alcoholic beverages for consumption off premises (provided, however, that the foregoing shall not prohibit the sale of alcoholic beverages by a restaurant licensed to sell alcoholic beverages, either at a bar within such restaurant or by table service, that is open for business before 11PM).;
- (dd) Any dumping, disposing, incineration or reduction of garbage (this prohibition shall not be applicable to garbage or trash compactors which may be located within a permitted use or trash or recycling collection receptacles);
- (ee) Any veterinary hospital or animal raising or boarding facility; provided, however, that this prohibition shall not be applicable to pet shops. Notwithstanding the generality of the

foregoing, however, any veterinary or boarding services provided in connection with the operation of a pet shop shall only be incidental to such operation, the boarding of pets as a separate customer service shall be prohibited and the combined incidental veterinary and boarding facilities shall occupy no more than twenty-five percent (25%) of the floor area of the pet shop;

- (ff) Laboratories, excluding any which are necessary to permitted medical uses.
- (gg) Fortune telling businesses;
- (hh) Any pool hall or betting facility;
- (ii) Intentionally Deleted;
- (jj) Any bus station or transportation depot;
- (kk) Intentionally deleted;
- (ll) Intentionally Deleted;
- (mm) Day laborer employment agency;
- (nn) Intentionally Deleted;
- (oo) Political campaign headquarters;
- (pp) the rental to others of residential rental property (as defined in Section 168(e)(2)(A) of the Internal Revenue Code, as amended);
- (qq) the sale of fireworks, except as an incidental part of another primary business;
- (rr) debt collection activities, debt consolidation services, credit repair or credit restoration activities, except as such activities are incidental to banking activities conducted by a state or Federally chartered bank or thrift;
- (ss) Intentionally Deleted;
- (tt) multi-level marketing activities, the sale of multi-level business opportunities or network marketing activities;
- (uu) any bowling alley or skating rink; and
- (vv) any parole, juvenile detention or similar service.

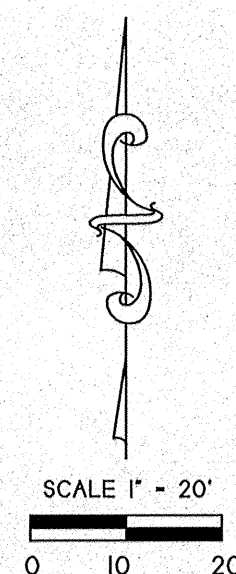
In the event of any conflict in the list of Prohibited Uses, the most restrictive use shall apply.

NE 1/4 SEC. 31 T 17 S, R 3 W W.M.  
EUGENE, LANE COUNTY, OREGON  
SEPTEMBER 14, 2020

RECORDED  
DATE: \_\_\_\_\_  
COUNTY CLERK  
BY: \_\_\_\_\_

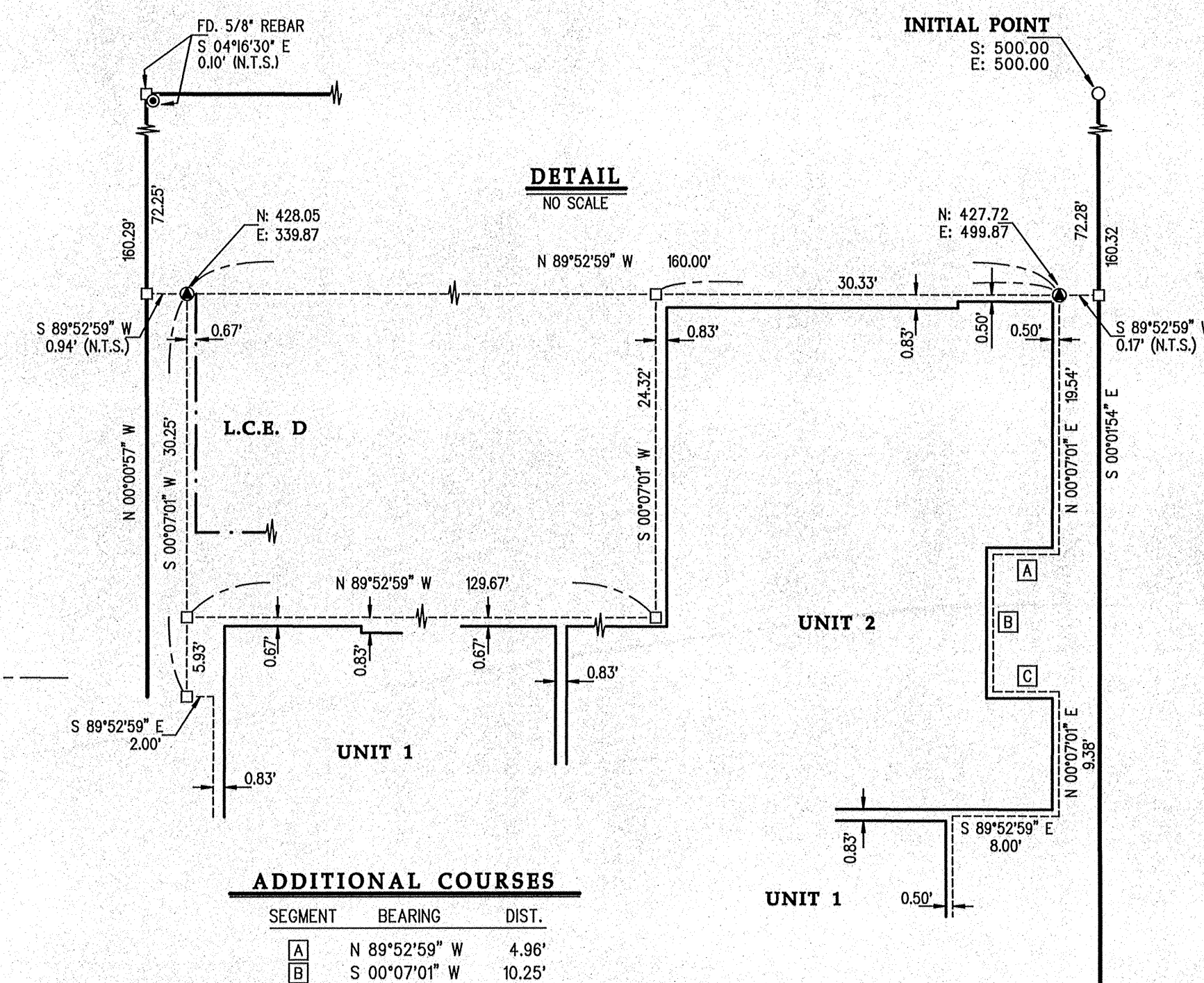
FILING DATE \_\_\_\_\_

RECORDER'S STICKER



● DENOTED BUILDING CORNER WITH COORDINATE VALUES RELATIVE TO THE INITIAL POINT  
 \_\_\_\_\_ PROPERTY BOUNDARY  
 - - - - - LIMITED COMMON ELEMENT BOUNDARY  
 ----- GENERAL COMMON ELEMENT BOUNDARY  
 \_\_\_\_\_ UNIT AREA BOUNDARY  
 ● FD. 1-3/8" BRASS DISK STAMPED "CERP" UNLESS OTHERWISE NOTED  
 ◎ FOUND 5/8" REBAR UNLESS OTHERWISE NOTED  
 ● FOUND 5/8" REBAR WITH A YELLOW PLASTIC CAP STAMPED "POAGE ENG. & SURV. INC."  
 ◎ FOUND 5/8" REBAR WITH A RED PLASTIC CAP STAMPED "POAGE ENG. REF. CORNER"  
 ● FOUND MAG. NAIL WITH ALUMINUM WASHER STAMPED "POAGE ENG. & SURV. INC."  
 ○ SET 5/8" X 30" REBAR WITH A YELLOW PLASTIC CAP STAMPED "POAGE ENG. & SURV. INC."  
 □ COMPUTED POINT. NO MONUMENT FOUND OR SET.  
 (N.T.S.) DIMENSION NOT SHOWN TO SCALE

1. EASEMENTS FOR UTILITIES OVER AND ACROSS THE PREMISES FORMERLY INCLUDED WITHIN THE BOUNDARIES OF THE EAST/WEST ALLEY IN BLOCK 2 OF SKINNER'S DONATION TO LANE COUNTY, NOW VACATED, IF ANY SUCH EXIST.
2. A DECLARATION OF AN ACCESS EASEMENT. 10.5 FEET IN WIDTH, BENEFITING THE SUBJECT PROPERTY AS DISCLOSED BY AN INSTRUMENT RECORDED DECEMBER 18, 2018 RECP. NO. 2018-058104 LANE COUNTY OREGON DEEDS AND RECORDS.



EXPIRES: DECEMBER 31, 2020

PLOTTER: CANON iPF605  
INK: CANON ipfI02mbk  
MEDIA: "PIXELLE" RIJB24-36

P.O. BOX 2527 \* EUGENE, OREGON 97402 \* (541) 485-4505  
JOB No. 4607, DWN. BY KSG\4609COND0-02.GXD, DATE: 07-20

IN THE BOARD OF COMMISSIONERS OF THE  
HOMES FOR GOOD HOUSING AGENCY, OF LANE COUNTY OREGON

ORDER 20-30-09-04H

In the Matter of Authorizing the  
Condominium Declaration for Market District  
Commons Condominiums.

This Written Action is effective as of the 30th day of September, 2020 executed by all of the members of the Board of Directors (the "Directors") of the Housing Authority and Community Agency of Lane County dba Homes for Good Housing Agency, as member and manager (the "Manager") of MD Manager LLC, an Oregon limited liability company (the "Company"), the managing member of MD Commons LLC, an Oregon limited liability company (the "Declarant"), which Directors hereby waive notice of the time, place and purpose of a special meeting of the Directors and the holding of such meeting and hereby adopt the following resolutions by written consent.

WHEREAS, the Directors have reviewed that certain Declaration Submitting Market District Commons Condominium to Condominium Ownership, dated of approximate date herewith (the "Condominium Declaration"), made by the Declarant, pursuant to which the Declarant proposes to create a leasehold condominium to be known as Market District Commons Condominium (the "Condominium"); and

WHEREAS, the Directors believe it to be in the best interests of the Declarant to enter into the Condominium Declaration; and

WHEREAS the Directors desire that the appropriate officers of the Manager execute the Condominium Declaration on behalf of the Company and the Declarant and desire that the Company and the Declarant be bound by the terms and conditions set forth therein.

**NOW, THEREFORE, IT IS HEREBY RESOLVED, that the Manager is authorized, on behalf of the Company and the Declarant to enter into the Condominium Declaration and all such other documents, instruments and agreements as may be desirable in connection therewith.**

BE IT RESOLVED, that Jacob Fox, as Executive Director, or any other officer of Housing Authority and Community Service Agency of Lane County, doing business as Homes For Good Housing Agency, as member and manager of MD Manager, LLC, the Managing Member of MD Commons LLC, acting together or acting alone (the "Authorized Officer"), is hereby authorized on behalf of the Manager, the Company and the Declarant to: (a) execute the Condominium Declaration in the name and on behalf of the Manager, the Company and the Declarant, in such form as the Authorized Officer executing the same may approve, such Authorized Officer's approval and authority to be conclusively evidenced by such Authorized Officer's execution thereof; such execution and delivery to be valid and binding on the Company, (b) to approve of any alterations and execute any amendments (and additional documents related thereto) to the Condominium Declaration, (c) to carry out and perform the obligations and enforce the rights of the Company under the Condominium Declaration, and (d)

to take all other action deemed by the Authorized Officer necessary or advisable in connection with the foregoing.

BE IT RESOLVED, that the Authorized Officer is hereby authorized to take such further action and to execute and deliver in the name and on behalf of the Manager, the Company and the Declarant such other documents, instruments and agreements that the Authorized Officer determines to be necessary or advisable in connection with the Condominium Declaration and the creation of the Condominium, and the execution and delivery thereof shall be conclusive evidence of such determination.

BE IT RESOLVED, that all acts authorized in the foregoing resolutions, but performed prior to the adoption of these resolutions, be and hereby are ratified, approved and confirmed in all respects.

BE IT RESOLVED FURTHER, that this Written Action may be executed in any number of counterparts, each of which shall be deemed an original, and all of which, taken together, shall constitute one document. Signatures obtained via facsimile, photocopy, or electronic photocopy (i.e., ".pdf") shall be deemed originals in all cases.

Done and dated this \_\_\_\_ day of \_\_\_\_\_, 2020.

BOARD OF COMMISSIONERS

\_\_\_\_\_  
Chairperson





# BOARD OF COMMISSIONERS AGENDA ITEM

**BOARD MEETING DATE:** 09/30/2020

**AGENDA TITLE:** ORDER/In the Matter of Approving Contract 20-P-0056  
(Architectural Services) for the 1100 Charnelton Permanent Supportive  
Housing Development

**DEPARTMENT:** Real Estate Development Division

**CONTACT :** Nora Cronin

**EXT:** 2521

**PRESENTER:** Nora Cronin

**EXT:** 2521

**ESTIMATED TIME :** 10 minutes

- ☒ **ORDER/RESOLUTION**
- ☐ **PUBLIC HEARING/ORDINANCE**
- ☐ **DISCUSSION OR PRESENTATION (NO ACTION)**
- ☐ **APPOINTMENTS**
- ☐ **REPORT**
- ☐ **PUBLIC COMMENT ANTICIPATED**

**Approval Signature**

**EXECUTIVE DIRECTOR:**

A handwritten signature in black ink, appearing to be "JAF", is written over a horizontal line.

**DATE:** 9/22

**LEGAL STAFF :**

**DATE:**

**MANAGEMENT STAFF:**

**DATE:**





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## **HOMES FOR GOOD MEMORANDUM**

**TO:** Homes for Good Board of Commissioners

**FROM:** Nora Cronin, Project Development Manager

**AGENDA ITEM TITLE:** ORDER 20-30-09-05H/ In the Matter of Approving Contract 20-P-0056 (Architectural Services) for the 1100 Charnelton Permanent Supportive Housing Development

**AGENDA DATE:** September 30, 2020

### **I MOTION**

It is moved that the Agency is authorized to award contract 20-P-0056 (Architectural Services) to Bergsund DeLaney Architecture & Planning for the Permanent Supportive Housing Community at 1100 Charnelton in Eugene, Oregon.

### **II ISSUE**

Homes for Good Housing Agency is developing a new permanent supportive housing (PSH) community for individuals experiencing chronic homelessness on a 0.44-acre parcel of land located downtown on the corner of West 11<sup>th</sup> Ave and Charnelton St. in Eugene, Oregon. Architectural design development work is commencing on this development, with a target of starting construction in April/May 2021, necessitating the contract to be executed.

### **III DISCUSSION**

#### **A. Background**

Homes for Good has been collaborating with Lane County and City of Eugene to develop a strategy for addressing the TAC report recommendation of developing 350 new Permanent Supportive Housing (PSH) units in the next 3-5 years. On February 25, 2020, Homes for Good entered into an Option Agreement with a private seller to purchase 1100 Charnelton for the purpose of developing PSH on the property.

Homes for Good intends to develop 45 units of housing on the site. The plan is to demolish the existing structure and build a new four-story building consisting of 45 studio apartments, ground floor common use and supportive service areas, limited parking, secure bike storage, and a secure courtyard. The target population is for individuals experiencing chronic homelessness and referred from Lane County's Coordinated Entry Central Wait List.

On August 7<sup>th</sup> 2020, Oregon Housing and Community Services awarded Low Income Housing Tax Credits and gap grant financing to the project. Homes for Good will still need to apply to the City

of Eugene for additional capital funding in the fall of 2020 in order to complete the capital financing package. 1100 Charnelton has been awarded Project-Based Vouchers as rental assistance for all units.

## B. Analysis

In December 2019, after consultation with legal counsel, Homes for Good Housing Agency issued a Request for Proposals (RFP) for Architectural Services for upcoming Agency Permanent Supportive Housing Developments. HFG had not executed an option agreement on 1100 Charnelton when the RFP was issued; however, we had started looking at site feasibility and development opportunities on the site. Eight architects submitted responses to the RFP.

Proposals were evaluated based on the following criteria, which was published in the RFP:

- Architectural & Consultant Team – overall experience, expertise and qualifications of Company/Firm as related to the services described in this RFP.
- Project Experience – experience and record of performance with similar affordable and permanent supportive housing projects.
- Predevelopment Design – firm’s approach to research and early design.
- Diversity, Equity and Inclusion (DEI) – commitment to engaging diverse populations particularly those facing disparities. Maximum score will be given to firm’s that have formally adopted Diversity, Equity and Inclusion strategies and MWESB strategies.
- Local Knowledge – ability to show experience and knowledge about the conditions in Lane County, as well as local codes and regulations specific to the area and the specific project site.
- Staffing/Capacity – capacity to perform the work in the desired timeline.

The evaluation committee ranked the top firm as Bergsund DeLaney Architecture & Planning followed closely by MWA Architects. Bergsund DeLaney was selected for 1100 Charnelton and MWA Architects for the development at 13<sup>th</sup> & Tyler. This selection was based on these two firms extensive experience in working and designing specifically for permanent supportive housing and their staffing capacity to meet desired project timelines. The remaining six firms were ranked in the following order: PIVOT Architecture; Pinnacle Architecture, Dustrud Architecture, Studio C, 2Form Architecture and Studio E.

Bergsund DeLaney was selected to provide architectural services, which will include sub-contracts with engineering (structural, mechanical, electrical, civil), and landscaping. Bergsund DeLaney provided an estimated maximum fee proposal of \$508,920. This includes roughly \$360,570 in architectural services and \$148,350 to consultants for engineering and other design services.

Board approval is now requested to execute the contract for Architectural Services with Bergsund DeLaney Architecture & Planning for the 1100 Charnelton PSH Development.

## C. Recommendation

Approval of the proposed motion.

## IV IMPLEMENTATION/FOLLOW-UP

Upon approval of the Order, the required documents will be executed as soon as possible.

## V ATTACHMENTS

None

IN THE BOARD OF COMMISSIONERS OF THE  
HOMES FOR GOOD HOUSING AGENCY, OF LANE COUNTY OREGON

ORDER 20-30-09-05H

In the Matter of Approving Contract 20-P-0056 (Architectural Services) for the 1100 Charnelton Permanent Supportive Housing Development

WHEREAS, Homes for Good Housing Agency recognizes the need to address the issue of people in our community who have been experiencing homelessness;

WHEREAS, Homes for Good Housing Agency has undertaken the development of a Permanent Supportive Housing community at 1100 Charnelton in Eugene, Oregon to address this community need;

WHEREAS, Homes for Good Housing Agency has the need for professional Architectural Services in order to carry out the development of the 1100 Charnelton PSH Development; and

WHEREAS, Homes for Good Housing Agency has completed a formal procurement process for the selection of Bergsund Delaney Architecture & Planning to provide Architectural Services.

NOW IT IS THEREFORE ORDERED THAT:

The Executive Director or Designee is authorized to enter into an Architectural Services Contract with Bergsund DeLaney Architecture & Planning for the 1100 Charnelton PSH Development.

DATED this \_\_\_\_\_ day of \_\_\_\_\_, 2020

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Chair, Homes for Good Board of Commissioners