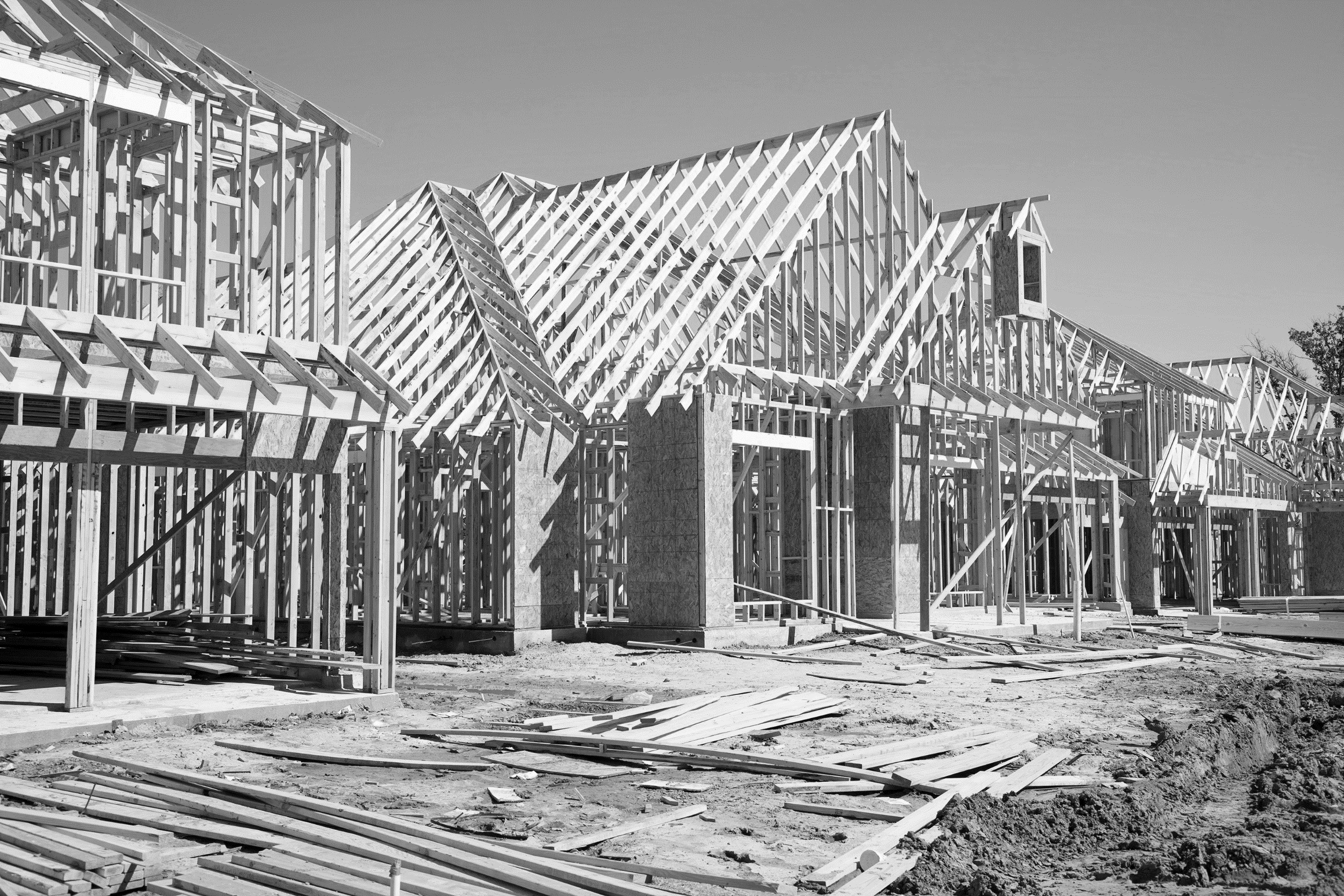
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**Marion County Board of Commissioner’s Office**

555 Court St.

Salem, OR 97301

[Commissioners@co.marion.or.us](mailto:Commissioners@co.marion.or.us)

[https://www.co.marion.or.us](https://www.co.marion.or.us/)

Phone: 503-588-5212

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CHDO Informational Meeting Minutes…………………………To be Included in Final Version

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Public Hearing Minutes………………………………………….To be Included in Final Version

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Executive Summary

*AP-05 Executive Summary- 24 CFR 91.200 (c), 91.220 (b)*

1. **Introduction**

On December 1, 2021, Marion County officially became an Entitlement Grantee with the approval of its five-year Consolidated Plan (Plan) under the Housing and Urban Development (HUD) Federal Housing Investment Partnerships Program (HOME) and the Community Development Block Group Program (CDBG). With the designation of becoming an Entitlement Grantee Marion County will begin receiving an annual allocation amount of approximately $621,125 of HOME Funds and $1,561,194 of CDBG Funds. As a recipient of CDBG funds, the County is required to prepare a five-year strategic plan that identifies housing and community needs, prioritizes these needs, identifies resources to address needs, and establishes annual goals and objectives to meet the identified needs. This five-year plan is known as the Consolidated Plan. The purpose of the Plan is to outline a strategy for the County to follow in using CDBG funding to achieve the goal of the CDBG program, “to develop viable urban communities by providing decent housing and a suitable living environment and expanding economic opportunities for low-and moderate-income persons.

In addition to the entitlement resources, Marion County received $2,251,172 in HOME-ARP (American Rescue Plan) that is to be allocated in a separate plan as a substantial amendment to its 2021 Annual Action Plan.

1. **Summary of Objectives and Outcomes Identified in Plan**

The Consolidated Plan for fiscal years 2021 through 2025 (Plan) was prepared in accordance with Section 91.100 through 91.230 of HUD’s Consolidated Plan Final Rule. Over the term of the five-year plan, approximately $7,805,970 is expected to be available, with up to 20% for planning activities and administration of the *CDBG Program,* and $3,105,625, with up to 10% for planning activities and administration for the *HOME Program*. Each year the County prepares an Annual Action Plan that outlines the specific program activities to be carried out in meeting the Plan’s strategies. The following were identified goals established by the Board of Marion County Commissioners based upon input received during the Consolidated Plan process.

* Provide for Community Housing Development Organization (CHDO) set-aside (As part of the HOME Program this requirement will continue to be an annual percentage of funds set aside-15% minimum to fulfill eligible activities that only a qualified CHDO can provide)
* Support Disaster Recovery Efforts
* Invest in Vital Community Facilities and Infrastructure
* Increase Access to Community Services
* Encourage Economic Opportunities
* Support Program Success

This document, “The Annual Action Plan, (AAP) outlines the activities to be carried out in Program Year (PY) 2022.

The County’s 2021-2025 Plan and Year 1 AAP was adopted by Board Order #21-066 on August 11, 2021, revised on October 8, 2021, and November 23, 2021 before final approval by HUD on December 1, 2021.

1. **Evaluation of Past Performance**

Marion County officially became an entitlement community on December 1, 2021. Therefore, there is no prior operation of the federal CDBG and HOME Programs. However, in its first year being an entitlement community Marion County has worked on creating the program designs for down payment assistance and owner rehabilitation and will be able to start implementing those programs in 2022. Due to program requirements and development cycles a majority of funds had to be diverted from projects listed in the 2021 Annual Action Plan to rehabilitation and down payment assistance. However, Marion County anticipates still allocating resources toward Center for Hope and Safety and Neighbors Serving Unsheltered Neighbors within its 2021 Annual Action Plan. The Substantial Amendment to divert funding to down payment assistance and owner rehabilitation was formally approved on March 23, 2022, and is set to be submitted to be approved by HUD by the end of May.

1. **Summary of Citizen Participation Process and Consultation Process**

On May 4th, 2022, Marion County held a CHDO informational meeting, which included inviting potential developers and other organizations that have operated with HOME funds in other jurisdictions throughout the state. They were also invited to attend the Annual Action Plan Work Session on May 19, 2022. Marion County also hosted the state CDBG-Disaster Recovery Grant Work Session on March 10, 2022. Minutes from the Disaster Recovery Work Session is provided as an attachment for this Annual Action Plan. As part of the Citizen Participation Process Marion County made a draft Annual Action Plan available for public comment from May 21st, 2022 through June 21st, 2022 for public comment. The Public Hearing was held on June 22nd, 2022. The Minutes from the CHDO informational meeting/Work Sessions and the Public Hearing are included as attachments as well as letters of invitation to the meetings.

1. **Summary of Public Comments or views**

A summary of comments will be included below. Full Transcripts of the Disaster Recovery Work Session Minutes, CHDO informational meeting minutes, CDBG/HOME/HOME-ARP Input Meeting, Public Hearing minutes and the public notice are included in the Appendix.

1. **Summary of comments or views not accepted and the reasons for not accepting them.**

All views and comments were accepted as part of the citizen participation process.

*PR-05 Lead & Responsible Agencies – 91.200 (b)*

1. Agency/Entity responsible for preparing/administering the Consolidated Plan

Describe the agency/entity responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source.

**Table 2-Responsible Agencies**

|  |  |  |  |
| --- | --- | --- | --- |
| Agency Role | Name | Department/Agency | Source of Funds |
| CDBG Administrator  Office Specialist 4 | Tim Glisson  Terri Darvell | Community Development Division | CDBG |
| HOME Administrator  Office Specialist 4 | Tim Glisson  Terri Darvell | Community Development Division | HOME |
| HOME-ARP Administrator  Office Specialist 4 | Tim Glisson  Terri Darvell | Community Development Division | HOME-ARP |

Narrative (Optional)

Marion County is the lead agency for the delivery of the Community Development Block Grant (CDBG)/HOME Investment Partnerships Programs/HOME-ARP funding to be delivered in coordination with the goals established in the 5-Year Consolidated Plan implemented through Annual Action Plans.

Consolidated Plan Public Contact Information:

Chris Eppley, Community Development Division Director

(503)-566-3963

Tim Glisson, Marion County CDBG/HOME Program Manager

(503)-302-4700

Terri Darvell, Office Specialist 4

(503)-588-5167

*AP-10 Consultation 91.100, 91.200 (b), 91.215 (l)*

2. Describe agencies/groups/organizations and others who participated in the process and describe the jurisdictions consultations with housing, social service agencies, or other entities.

**Table 3: Organization Consulted**

|  |  |
| --- | --- |
| **Agency/Group/Organization** | Public Housing Authority  **(Attended Input Meeting on May 19, 2022)** |
| **Agency/Group/Organization Type** | Services-Homelessness  Other Government – Local |
| **What section of the Plan was addressed by Consultation?** | Homeless Needs - Families with children  Homelessness Strategy  Affordable Housing  Public Housing Needs |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Marion County Housing Authority assists low-moderate income families achieve stable housing, economic opportunity, and coordination with social service providers. |
| **Agency/Group/Organization** | Human Solutions (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services - Housing  Services-Families with children  Services-Homelessness  Services-Development Programs |
| **What section of the Plan was addressed by Consultation?** | Housing Need Assessment  Homeless Needs - Chronically homeless  Homeless Needs - Families with children  Homelessness Strategy  Services-Career/Job Programs |
| **Briefly describe how the**  **Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Provides services that offer affordable housing, housing stability and employment programs. They also provide services to those experiencing homelessness; emergency shelters and housing assistance. |
| **Agency/Group/Organization** | Oregon Home Builders Association  (For-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Construction of Affordable Housing |
| **What section of the Plan was addressed by Consultation?** | Affordable Housing Needs  Development Strategy |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | HBA advocates for housing affordability and availability, working with Mid-Valley Affordable Housing Coalition PAC and Oregonians for Affordable Housing. |
| **Agency/Group/Organization** | Family Building Blocks (Non-Profit) **(Attended Input Meeting on May 19, 2022)** |
| **Agency/Group/Organization Type** | Services-Children  Services-Families with Children  Services-Parenting Education  Services-Food Pantry  Services-Clothing Closet |
| **What section of the Plan was addressed by Consultation?** | Community Services |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Services provide families and parents with education, prevention, services for children and family stability |
| **Agency/Group/Organization** | Northwest Senior & Disability Services  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Intergovernmental Agency |
| **What section of the Plan was addressed by Consultation?** | Seniors  Adults with Disabilities  Non-Homeless Special Needs  Anti-Poverty Strategy |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Services for Seniors and Adults with Disabilities |
| **Agency/Group/Organization** | Center for Hope and Safety (Non-Profit) **(Attended Input Meeting on May 19, 2022)** |
| **Agency/Group/Organization Type** | Services-Victims of Domestic Violence  Services-Crime Victim Advocacy & Support  Services-Housing  Services-Counseling  Services-Social Services Programs  Services-Homelessness  Services-Housing Needs Assessment |
| **What section of the Plan was addressed by Consultation?** | Non-Homeless Special Needs  Affordable Housing  Community Services  Homeless Needs-Families with children  Housing Needs Assessment  Anti-Poverty Strategy |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Center for Hope and Safety provides victims of domestic violence, human trafficking, and stalking with services and support. Resources for an expansion of affordable housing. |
| **Agency/Group/Organization** | Arches (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Homelessness  Services-Housing Assessments  Services-Housing  Services-Supportive Services |
| **What section of the Plan was addressed by Consultation?** | Affordable Housing  Homelessness Needs  Stable Housing |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | The Arches Project provides housing and street outreach, housing referrals, and tenant education for people that are experiencing homelessness. |
| **Agency/Group/Organization** | Fair Housing Council of Oregon (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Renters  Services-Homebuyers  Services-Housing  Services-Housing Counseling |
| **What section of the Plan was addressed by Consultation?** | Affordable Housing  Community Services  Fair Housing  Development Strategy |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | The Fair Housing Council of Oregon promotes equity and inclusion for renters, homebuyers, housing providers and social services. |
| **Agency/Group/Organization** | DevNW (Non-Profit)  **(Attended Input Meeting on May 19, 2022)** |
| **Agency/Group/Organization Type** | Services-Affordable Rentals  Services-Housing Counseling  Services-Affordable Housing  Services-Education and Counseling |
| **What section of the Plan was addressed by Consultation?** | Affordable Housing  Homelessness Strategy  Economic Development  Community Services  Affordable Rentals  Development Strategy  Public Housing |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | DevNW is an organization that provides individuals and families access to affordable housing, housing counseling, and affordable rentals and homeowners. |
| **Agency/Group/Organization** | COG-Mid Willamette Valley Council of Government  **(Attended Input Meeting on May 19, 2022)** |
| **Agency/Group/Organization Type** | Intergovernmental Coop |
| **What section of the Plan was addressed by Consultation** | Housing  Homelessness  Community Services  Community Development  Economic Development |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | COG is an organization that works with 40 local governments and the Confederated Tribes of Grand Ronde to expand and enhance community and economic development. COG is working with Marion County in providing affordable housing and reduce chronic homelessness. |
| **Agency/Group/Organization** | Oregon Realtors (For-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Affordable Housing  Services-Affordable Rentals  Services-Homebuyers |
| **What section of the Plan was addressed by Consultation?** | Housing  Housing Development  Fair Housing |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Oregon Realtors is working to provide and encourage affordable housing developments and homeownership. |
| **Agency/Group/Organization** | Mid-Valley Association of Realtors  (For-Profit)  Community Fund  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Affordable Housing  Services-Homebuyers  Services-Homelessness  Services-Children  Services-Families |
| **What section of the Plan was addressed by Consultation?** | Housing  Community Services  Homelessness  Development Strategy |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Mid-Valley Association of Realtors Community Fund helps to provide services to break the cycle of homelessness and provide opportunities for affordable housing, as well as services for children and families at risk. |
| **Agency/Group/Organization** | SEDCOR (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Community Development  Services-Economic Development |
| **What section of the Plan was addressed by Consultation?** | Development Strategy  Community Development  Economic Development |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | SEDCOR provides resources that help create a successful community and increase economic opportunities. |
| **Agency/Group/Organization** | Applegate Landing LLC (For-Profit)  **(Attended Input Meeting on May 19, 2022)** |
| **Agency/Group/Organization Type** | Services-Construction of Affordable Housing  Services-Construction of Affordable Rentals |
| **What section of the Plan was addressed by Consultation?** | Housing  Housing Development  Fair Housing  LMI Rentals |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Applegate Landing LLC constructs housing and rental units along with community spaces for individuals and families that meet the LMI index. |
| **Agency/Group/Organization** | Catholic Community Services (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Homelessness  Services-Affordable Housing  Services-Youths 16-20  Services-Affordable Rentals  Services-Counseling |
| **What section of the Plan was addressed by Consultation?** | Housing  People with Disabilities  Community Services  Homelessness |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | The Catholic Community Services provides services for youths transitioning out of foster care, affordable housing, housing services for people with disabilities as well as services for people experiencing homelessness. |
| **Agency/Group/Organization** | United Way Mid-Willamette Valley  (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Affordable Housing  Services-Affordable Rentals  Services-Women’s Shelter  Services-Community Services  Services-Homeless Needs |
| **What section of the Plan was addressed by Consultation?** | Housing  Temporary Shelters  Homelessness |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | The United Way Mid-Willamette Valley provides resources for communities such as, people experiencing homelessness, affordable housing and rentals, and temporary shelters for women and teens, as well as referrals to community services. |
| **Agency/Group/Organization** | Sunny Oaks Inc (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Self Management  Services-Temporary Housing  Services-Homelessness Needs  Services-People with Disabilities |
| **What section of the Plan was addressed by Consultation?** | Housing  People with Disabilities  Homelessness |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Sunny Oaks provides support living services for adults with disabilities as well as those with behavior, mental health, and medical needs. |
| **Agency/Group/Organization** | Neighbor Works Umpqua (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Affordable Housing  Services-Affordable Rentals  Services-Homeowner  Services-Homebuyer |
| **What section of the Plan was addressed by Consultation?** | Housing  Affordable Rentals  Homeowner Rehabilitation  Homebuyer Counseling |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Neighbor Works Umpqua works to build affordable housing and rental needs. Provides services for homebuyers and homeowners, they also work to increase economic and community development. |
| **Agency/Group/Organization** | Rose Community Development  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Affordable Housing  Services-Affordable Rentals  Services-Homebuyers  Services-Community Development |
| **What section of the Plan was addressed by Consultation?** | Housing  Housing Development  People with Disabilities  Homeownership |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Rose Community services offers services for affordable rentals and housing. Rentals and housing for seniors and people with disabilities. |
| **Agency/Group/Organization** | Northwest Housing Alternatives (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Affordable Housing  Services-Seniors  Services-People with Special Needs |
| **What section of the Plan was addressed by Consultation?** | Housing  Affordable Rentals  Seniors  People with Special Needs |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Northwest Housing Alternatives provides affordable housing and rental options for families, seniors, and people with Special Needs. |
| **Agency/Group/Organization** | Cornerstone Community Housing  (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Affordable Housing  Services-Homebuyers  Services-Community Services |
| **What section of the Plan was addressed by Consultation?** | Housing  Housing Development  Fair Housing  Homebuyers |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Cornerstone Community Housing is a housing developer and resident services provider for low-moderate income residents. They also offer referrals and counseling for residents to community resources. |
| **Agency/Group/Organization** | Bridge Housing (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Affordable Housing  Services-Housing Development  Services-Seniors |
| **What section of the Plan was addressed by Consultation?** | Housing  Housing Development  Fair Housing  Seniors |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Bridge Housing participates in developing affordable housing and rentals for low-moderate income individuals and families as well as seniors |
| **Agency/Group/Organization** | Bridge Meadows (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Affordable Housing  Services-Community Support  Services-Affordable Rentals  Services-Counseling and Support Services |
| **What section of the Plan was addressed by Consultation?** | Housing  Affordable Rentals  Community Development  Community Services |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Bridge Meadows provides affordable housing and rentals to promote home stability. They also provide counseling and community support. |
| **Agency/Group/Organization** | CPAH-Community Partners for Affordable Housing  **(Attended CHDO Informational Meeting)** |
| **Agency/Group/Organization Type** | Services-Affordable Housing  Service-Community Development  Services-Community Services |
| **What section of the Plan was addressed by Consultation?** | Housing  Housing Development  Fair Housing  Seniors  Community Development |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | CPAH helps to provide housing stability and eviction prevention by offering services to residents. They provide services for families with children as well as seniors. |
| **Agency/Group/Organization** | Reach Community Development (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Affordable Housing  Services-Affordable Rentals  Services-Community Development  Services-Homeowners |
| **What section of the Plan was addressed by Consultation?** | Housing  Housing Development  Affordable Rentals  Homeowners Rehabilitation  Homebuyers |
| **Agency/Group/Organization** | Latino Business Alliance  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Community Development  Services-Economic Development |
| **What section of the Plan was addressed by Consultation?** | Community Development  Economic Development |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | The Latino Business Alliance works with organizations to build stronger communities and create a positive economic impact. |
| **Agency/Group/Organization** | Habitat for Humanity (Non-Profit)  (Mid-Willamette & North Willamette)  **Mid-Willamette attended May 19, 2022 Input Meeting (Both attended CHDO Informational Meeting)** |
| **Agency/Group/Organization Type** | Affordable Housing Development |
| **What section of the Plan was addressed by Consultation?** | Housing |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Habitat for Humanity provides low-moderate income residents with homeowning opportunities. Their program contributes to stronger communities and financial stability. |
| **Agency/Group/Organization** | Love Inc.  **(Attended Input Meeting May 19, 2022 consulted one on one)** |
| **Agency/Group/Organization Type** | Services-Counseling and Support Services  Services-Community Support |
| **What section of the Plan was addressed by Consultation?** | Community Support  Community Services |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Love Inc offers referrals and counseling for residents to community resources, education, financial counseling, and health programs. |
| **Agency/Group/Organization** | Oregon Entrepreneur Network  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Community Development  Economic Development. |
| **What section of the Plan was addressed by Consultation?** | Community Development  Economic Development |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | The Oregon Entrepreneur Network works with organizations to build stronger communities and create a positive economic impact. |
| **Agency/Group/Organization** | Chemeketa Small Business Development Center  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Community Development |
| **What section of the Plan was addressed by Consultation?** | Economic Development |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Provide learning opportunities for small business and real estate development in LMI areas. |
| **Agency/Group/Organization** | Casa of Oregon (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Affordable Housing  Services-Affordable Rentals |
| **What section of the Plan was addressed by Consultation?** | Housing  Anti-Poverty Strategy  Fair Housing |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Provides financial counseling, works with partners, funders, and government agencies to provide affordable housing and rentals. |
| **Agency/Group/Organization** | Farmworker Housing Development Corporation (Non-Profit)  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Affordable Housing  Services-Affordable Rentals  Services-Education and Counseling  Services-Workforce Development |
| **What section of the Plan was addressed by Consultation?** | Housing  Fair Housing  Homelessness |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Farmworker Housing Development Corporation provides LMI housing opportunities, education, financial counseling, and health programs. |
| **Agency/Group/Organization** | Continuum of Care  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Service-Homelessness  Services-Families with Children  Services-Youth Homelessness |
| **What section of the Plan was addressed by Consultation?** | Homeless Needs - Families with children  Homelessness Strategy  Homeless Needs-Unaccompanied Youth  Homelessness-Veterans  Public Housing Needs  Housing Needs Assessment |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Provides services to youths, families with children and individuals that are experiencing homelessness, as well as veterans and unaccompanied youth. |
| **Agency/Group/Organization** | Marion County Health & Human Services  **Attended Input Meeting on May 19, 2022** |
| **Agency/Group/Organization Type** | Other Government-Local |
| **What section of the Plan was addressed by Consultation?** | Service-Residents with disabilities |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Access to services for residents with Intellectual and Developmental disabilities, health, and mental health services. |
| **Agency/Group/Organization** | Marion County Community Services Department  **(Attended May 19, 2022 Input Meeting)** |
| **Agency/Group/Organization Type** | Services-Economic Development  Services-Community Development |
| **What section of the Plan was addressed by Consultation?** | Economic Development  Community Development |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Services and support for child abuse prevention and awareness and family support. Plans and efforts to grow the economy, increase employment and standards of living in Marion County. |
| **Agency/Group/Organization** | Marion County Public Works  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Services-Community Development |
| **What section of the Plan was addressed by Consultation?** | Community Development |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Services to improve and develop communities in Marion County. |
| **Agency/Group/Organization** | Marion County Veteran Service Office **(Attended May 19, 2022 Input Meeting)** |
| **Agency/Group/Organization** | Services-Veterans  Services-Homelessness  Services-Employment Services |
| **What section of the Plan was addressed by Consultation?** | Housing  Homelessness  Veterans |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Provides services and support for Veterans, dependents, and survivors. Housing needs of Veterans. |
| **Agency/Group/Organization** | Crossroads Community (Non-Profit) **(Attended Input Meeting on May 19, 2022)** |
| **Agency/Group/Organization Type** | Services-Housing  Services-Homelessness |
| **What section of the Plan was addressed by Consultation?** | Housing  Homelessness |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Works with partners, government agencies, and donors to develop affordable housing units. |
| **Agency/Group/Organization** | Easterseals Oregon (Non-Profit)  **(Attended Input Meeting on May 19, 2022)** |
| **Agency/Group/Organization Type** | Services-Homeless Veterans  Services-Affordable Housing-Seniors  Services-Employment Assistance Seniors  Services-Employment Assistance Veterans  Services-Residents with disabilities |
| **What section of the Plan was addressed by Consultation?** | Veterans  Seniors  Homelessness  Residents with disabilities  Children |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Provides services and support to children with special needs, residents with disabilities, veterans, and seniors |
| **Agency/Group/Organization** | Chemeketa Community College  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Educational  Services-Affordable Rental Referrals  Services-Academic Support  Services-Counseling  Services-Community Resources  Services-Child care & Parenting  Services-Financial Resources  Services-Health & Safety |
| **What section of the Plan was addressed by Consultation?** | Housing  Community Services |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Chemeketa provides a variety of services for students that meet the low-moderate income index. |
| **Agency/Group/Organization** | Willamette University  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization** | Educational  Services-Community Services  Services-Economic Development |
| **What section of the Plan was addressed by Consultation?** | Community Services  Economic Development |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Willamette provides services to students for them to successfully complete the programs and contribute to the Marion County Community. |
| **Agency/Group/Organization** | Keizer Chamber of Commerce  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Other Government-Local  Not for Profit |
| **What section of the Plan was addressed by Consultation?** | Community Development  Economic Development |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Keizer Chamber of Commerce works to bring businesses to the community to increase a positive economic impact. |
| **Agency/Group/Organization** | Woodburn Chamber of Commerce  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Other Government-Local  Not for Profit |
| **What section of the Plan was addressed by Consultation?** | Community Development  Economic Development |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Woodburn Chamber of Commerce works to bring businesses to the community to increase a positive economic impact. |
| **Agency/Group/Organization** | Silverton Chamber of Commerce  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Other Government-Local |
| **What section of the Plan was addressed by Consultation?** | Community Development  Economic Development |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Silverton Chamber of Commerce works to bring businesses to the community to increase a positive economic impact. |
| **Agency/Group/Organization**  **Agency/Group/Organization**    **Agency/Group/Organization** | Eric Underwood-City Manager  Donald, OR-Marion County  Invited to the May 19, 2022 Input Meeting  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Petricia Wright-City Recorder  St. Paul, Oregon-Marion County  Invited to the May 19, 2022 Input Meeting  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Stuart Rodgers-City Recorder  Aurora, Oregon-Marion County  Invited to the May 19, 2022 Input Meeting  Vicki Nogel-Director of Administration  Hubbard, Oregon-Marion County  Invited to the May 19, 2022 Input Meeting  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Scott Derickson-City Administrator  Woodburn, Oregon-Marion County  **(Eric Swensen, Mayor attended Input Meeting May 19, 2022)**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Adam Brown-City Manager  Keizer, Oregon-Marion County  **(Attended Input Meeting May 19, 2022)**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Robin Fournier-City Manager  Scotts Mills, Oregon-Marion County  Invited to the May 19, 2022 Input Meeting  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Mark Daniel-City Manager  Mt. Angel, Oregon-Marion County  Invited to the May 19, 2022 Input Meeting  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Ron Chandler-City Manager  Silverton, Oregon-Marion County  Invited to the May 19, 2022 Input Meeting  Ron Harding-City Administrator  Aumsville, Oregon-Marion County  Invited to the May 19, 2022 Input Meeting  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Sarah Cook-City Manager  Jefferson, Oregon-Marion County  Invited to the May 19, 2022 Input Meeting  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Alissa Angelo-City Manager  Stayton, Oregon-Marion County  **(Dan Fleischman attended Input Meeting May 19, 2022)**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Myrna Harding-Finance/City Manager  Katie Scott-City Recorder  Sublimity, Oregon-Marion County  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Stacie Cook-City Recorder  Mill City, Oregon-Marion County  **(Attended Input Meeting May 19, 2022)**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Kelly Galbraith-City Recorder  Detroit, Oregon-Marion County  Invited to the May 19, 2022 Input Meeting  Robert Weikum-Mayor  Idanha, Oregon-Marion County  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization** | Susie Marston-City Manager  Gervais, Oregon-Marion County  Invited to the May 19, 2022 Input Meeting |
| **Agency/Group/Organization Type** | Other Government-Local |
| **What section of the Plan was addressed by Consultation?** | Community Needs |
| **Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?** | Working with entitlement communities partner cities to identify needs throughout the County in establishing potential projects for funding in future years. |

AP-12 Participation 91.105, 91.200 (c)

**Table 4: Outreach**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Sort  Order | Mode of  Outreach | Target of  Outreach | Summary of response/attendance | Summary of comments received | Summary of comments not accepted and reasons | URL (If applicable) |
| 1 | Letters/Emails/Phone Calls to Applicants | \*Letters to Community members  \*Emails to County/Department Staff  \*Letters to all City Managers  (Contact Lists are attached for both the Work Session and Public Hearing) | Annual Input meeting was held on May 19th in the Commissioners Board Room at a regular scheduled work Session | Discussion on potential projects/creating lists of projects for consideration on annual basis/what needs exist in the community to potentially amend Consolidated Plan. | Not Applicable | CDBG and HOME Programs (marion.or.us) |
| 2 | Letters mailed to potential developers for CHDO Meeting | Informational Meeting held on May 4th  at 6 p.m. in the Commissioners hearing room and via Zoom to discuss Marion County’s CHDO requirements and amount of funds available. |  |  | Not Applicable |  |
| 3 | Press Release/Notice of Meetings | Work Session and Public Hearing to:  [apportland@ap.org](mailto:apportland@ap.org)  [editor@keizertimes.com](mailto:editor@keizertimes.com)  [info@kwvtsalem.com](mailto:info@kwvtsalem.com)  KMUZ Radio  [newsroom@capitalpress.com](mailto:newsroom@capitalpress.com)  [newsroom@oregonian.com](mailto:newsroom@oregonian.com)  [publislisher@salembusinessjournal.com](mailto:publislisher@salembusinessjournal.com)  Statement Journal  [Swett8893@comcast.net](mailto:Swett8893@comcast.net)  Jasmine White  Justin Much  Phil Hawkins  Myrna Harding | Press notification was  disseminated by the  Board of Commissioner’s Office for Public Meeting and Work Session | Minutes from Work Sessions and Public Hearing are Attached | Not Applicable | CDBG and HOME Programs (marion.or.us) |

AP-15 Expected Resources- 91.220 (c) (1.2)

The following below are the expected allocation amounts for CDBG, HOME and HOME-ARP:

CDBG: $1,446,086 HOME-ARP: $2,251,172.00 HOME: $638,631

**Table 5: Allocation Amounts**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Program | Source of Funds | Uses of Funds | Annual Allocation: | Program Income: | Prior Year Resources: | Total: | Expected Amount Available Remainder of ConPlan | | Narrative Description | |
| CDBG | Public Federal | * Public Services * Acquisition   Disaster  Recovery | $1,446,086 | N/A | N/A | $1,446,086 | $4,683,582 | | Marion County expects to complete a substantial amendment to Year 1 Allocation which will cover the full amount allocated in year 1. | |
| HOME | Public Federal | * CHDO Set-Aside * Construction of Housing Units * Down Payment Assistance | $638,631 | N/A | N/A | $638,631 | $1,956,544 | | Marion County expects to complete a substantial amendment to Year 1 Allocation which will cover the full amount of allocated fund in year 1 to Down Payment Assistance | |
| HOME (ARP)  10-Year Allocation | Public  Federal | Administration | - | - | $2,251,172.00 | $ 2,251,172.00 | | $ 2,183,636.84 | | Marion County only expects to expend Administrative Dollars for HOME (ARP) as it develops its allocation plan in Year 2 | |

*Explain how federal funds will leverage those additional resources (private, state, and local funds, including a description of how matching requirements will be satisfied.*

Sources of match can be cash, donated land or real property, infrastructures improvements, bonds issued by state or local government, donated materials, equipment, or professional services, sweat equity, and the value of foregone taxes.

In evaluating applications, the match requirement was considered, and Marion County’s development subsidy being provided to Habitat for Humanity Mid-Willamette Chapter will be matched from private donations, sweat equity, and other grants that are received. Habitat will be acquiring an additional $300,000 to build two units of housing and Marion County anticipates that a majority if not all the additional funds will count as match. There may be additional match dollars from homebuyers as they purchase homes although it is not required by Marion County.

*If appropriate, describe publicly owned land or property located within the jurisdiction that may be used to address the needs identified in the plan.*

The County does not anticipate owning and land or property to address identified needs within the Consolidated Plan at this time. However, there may be some opportunities the County may pursue in years 3-5 of the Consolidated Plan.

ANNUAL GOALS AND OBJECTIVES

AP-20 Annual Goals and Objectives- 91.420, 91.220 (c) (3) & (e)

**Table 6: CDBG FUNDS**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Goal Name | Start Year | End Year | Category | Geographic Area | Needs Addressed | Funding | Goal Outcome Indicator |
| Public Facilities & Infrastructure | 2021 | 2025 | Public Facilities & Infrastructure | Keizer | Acquisition Transitional Housing | $533,000 | 1 property acquired, however there will be numerous individuals housed over the next 50 years which is the required length of the agreement with the non-profit for receiving CDBG Funds. |
| Increase Access to Community Services | 2021 | 2025 | Non-Homeless Special Needs | East Salem | Low-Moderate Income Area | $216,912 | 800 youth per year served |
| Support Disaster Recovery | 2021 | 2025 | Non-Housing Community Development or Affordable Housing | Canyon: Mill City, Detroit, Idanha | Disaster Relief | $406,957 | TBD |
| Support Program Success | 2021 | 2025 | Support Program Success | Countywide | Administration | $289,217.20 | N/A |

**Table 7: HOME FUNDS**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Goal Name | Start Year | End Year | Category | Geographic Area | Needs Addressed | Funding | Goal Outcome Indicator |
| Provide for CHDO Set-Aside | 2021 | 2025 | Affordable Housing | TBD | Low-to-moderate income housing | $95,794 | 1 Home Built |
| Increase Availability and Affordability of Housing Options | 2021 | 2025 | Affordable Housing | East Salem | Low-to-moderate income housing | $250,000 | 2 Homes Built |
| Increase Availability & Affordability of Housing Options | 2021 | 2025 | Affordable Housing | Countywide | Low-to-moderate income housing | $228,974 |  |
| Support Program Success | 2021 | 2025 | Non-Housing Community Development | Countywide | Administration | $63,863 | N/A |

**Table 8: HOME-ARP**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Goal Name | Start Year | End Year | Funding | Goal Outcome Indicator |
| TBD | 2021 | 2031 | $2,251,172 | TBD |

AP-35 Projects – 91.220 (d)

The following projects/programs were identified by the Marion County Board of Commissioners to fund under the PY 2022-2023 Funding cycle. Any changes to the below list may require a substantial amendment and an additional public comment period.

**Table 9: Projects/ Programs Allocated Funding**

|  |  |
| --- | --- |
| Project # | Project Name |
| 1 | 2022-Boys & Girls Club (Operations/Supplies) |
| 2 | 2022-Soaring Heights (Acquisition) |
| 3 | 2022-Disaster Recovery Efforts (TBD) |
| 4 | 2022-CHDO Set-Aside |
| 5 | 2022-Mid-Willamette Habitat for Humanity (Construction of 2 Homes) |
| 6 | 2022-Down Payment Assistance |
| 7 | 2022-Administration |

The County received a total of 8 Applications for funding in FY2022-2023 cycle which included applications from the following organizations:

**Table 10: Applications Received**

|  |  |
| --- | --- |
| Application # | Organization and Request |
| 1 | Habitat for Humanity- Mid-Willamette Valley: Construction of 2 Homes in East Salem |
| 2 | Habitat for Humanity- North Willamette Valley: Construction of 17 Homes in Silverton |
| 3 | Home First/Green Light Development: Apartment Complex in Mill City |
| 4 | Boys and Girls Club\*: Operating Cost (Wages) and Supplies |
| 5 | AWARE Food Bank\*: Application was for Rehabilitation of the building in Woodburn that was part of an Arson and Operating Expenses |
| 6 | Farmworker Housing Development Corporation: Rehabilitation of Cipriano Ferrel Community Building |
| 7 | Soaring Heights: Acquisition & Rehabilitation of dwelling in Keizer for Transitional Housing |
| 8 | Sheltering Silverton: Operating expenses and lean on a new building |

*\*Public Service Applications (Part or Entire Application fell under Public Service Cap)*

Of the CDBG Public Service applications received by the Board of Commissioners the decision was to fund the Boys and Girls Club at the amount of $234,178. The remaining CDBG funds were identified for the following applications/categories Soaring Height at the amount of $533,000 (Acquisition), administration at the amount of $312,238 and leave the remaining $481,773 funds within the identified goal of “Support Disaster Recovery Efforts”.

Under the HOME Program the Board of Commissioners made the decision to fund the Habitat for Humanity- Mid-Willamette Valley Chapter at their full ask of $250,000 to construct 2 homes, $93,169 which is the minimum required CHDO set-aside requirement, $62,112 for administration, and $214,844 in Down Payment Assistance.

Marion County received final Allocation numbers from the United States Department of Housing and Urban Development on May 16, 2022 and the corresponding changes to the budget are reflected in the allocation totals in Table 6 & 7 and well as the project summary section.

**Describe the reasons for allocation priorities and any obstacles to addressing underserved needs.**

According to Oregon’s Regional Housing Needs Report published in 2021 the state of Oregon will need to build about 584,000 new homes over the next 20 years to meet population growth. About ¼ of these units are needed now to accommodate today’s population. In correspondence to this pressing need the Willamette Valley is projected to need 101,704 units including 8,972 units for the homeless populations. The assessment also states that the state of Oregon will need to produce 159,114 units of housing available for incomes that are less than 80% AMI. With these numbers in mind Marion County allocated funding to produce affordable housing units.

According to the National Alliance to End Homelessness and the Continuum of Care 2020 data, on any given night 624 people are homeless in the Marion and Polk County region. While the data may show homelessness was on the decline up until 2020 the Covid-19 Pandemic coupled with rising housing prices certainly has increased the homeless population in the area. This is evidence by the latest death of 4 homeless individuals who were struck by a car in the early morning while residing in a homeless camp. With the visibility of the homeless population, it is of great importance to Marion County to help which is why the acquisition of a transitional housing unit was an important priority. This will allow the organization to be positioned to expand its services and reach more homeless individuals. It was also important for the County to hold resources for disaster recovery. Although there are a lot of resources in the pipeline for Disaster Recovery the County wants to be able to have a more readily available source now if a need arises. The County may choose to reprogram the funds to other eligible projects/categories if other funds become more useful for the disaster area.

AP-38 Project Summary

Project Summary Information

**Table 11: Applications/Programs Tentatively Funded**

|  |  |
| --- | --- |
| **Project Name** | **Boys and Girls Club** |
| Target Area | Epping Center (East Salem) |
| Goals Supported | Increase Access to Community Services |
| Needs Addressed | Public Services |
| Funding | $234,178 (CDBG)-Submitted/$216,912 (Awarded due to Final Allocation from HUD) |
| Description | Tentatively the allocated funding will be used as a public service for staff costs to operate programs. However, in future conversations it may be used elsewhere for equipment for programs if needed. |
| Target Date | Start date is September 2022 until funds have run out |
| Estimate the number and type of families that will benefit from the proposed activities | 200 youth/day or 800 unduplicated youth/year |
| Location Description | East Salem-within a low-to-moderate income area |

|  |  |  |
| --- | --- | --- |
| **Project Name** | | **Soaring Heights** |
| Target Area | Keizer | |
| Goals Supported | Homelessness/Public Facilities and Infrastructure | |
| Needs Addressed | Invest in Vital Community Facilities and Infrastructure | |
| Funding | $533,000 (CDBG) | |
| Description | The funds provided will be used to acquire the Oriole House in Keizer. Once acquired Soaring Heights will be able to seek other properties and expand the transitional housing units for homeless populations in the area. | |
| Target Date | December 2022 | |
| Estimate the number and type of families that will benefit from the proposed activities | Since the property will have to remain a public facility for transitional housing for a minimum of 50 years there we anticipate 100’s of individuals will be helped over the course of decades. | |
| Location Description | Keizer | |

|  |  |
| --- | --- |
| **Project Name** | **Support Disaster Recovery Efforts** |
| Target Area | Wildfire affected areas |
| Goals Supported | TBD |
| Needs Addressed | Wildfire affected families/cities |
| Funding | $481,778 (CDBG)-Allocated/ $406,957 (Allocated due to final allocation from HUD) |
| Description | Unidentified Project |
| Target Date | 2023 |
| Estimate the number and type of families that will benefit from the proposed activities | TBD |
| Location Description | Wildfire affected areas |

|  |  |
| --- | --- |
| **Project Name** | **CHDO Set-Aside** |
| Target Area | Marion County Service Area |
| Goals Supported | Provide for CHDO Set-Aside |
| Needs Addressed | Low-to-moderate Income Housing |
| Funding | $93,168 (HOME)-Allocated/$95,794 Final Allocation due to HUD final allocation numbers from HUD |
| Description | 15% set-aside for CHDO Activities |
| Target Date | 2023-2025 |
| Estimate the number and type of families that will benefit from the proposed activities | 1 Family |
| Location Description | Marion County Service Area |

|  |  |
| --- | --- |
| **Project Name** | **Mid-Willamette Habitat for Humanity** |
| Target Area | East Salem |
| Goals Supported | Expand Affordable Housing |
| Needs Addressed | Affordable Housing |
| Funding | $250,000 (HOME) |
| Description | Subsidy for the Development of 2 homes |
| Target Date | Begin Construction in Fall of 2022 and complete in fall of 2023. |
| Estimate the number and type of families that will benefit from the proposed activities | 2 Families |
| Location Description | East Salem (496 & 498 Bistrika Lane NE. Salem, OR. 97301) |

|  |  |
| --- | --- |
| **Project Name** | **Down Payment Assistance** |
| Target Area | Marion County Service Area |
| Goals Supported | Increase Availability and Affordability of Housing Options |
| Needs Addressed | Low-to-Moderate Income Housing |
| Funding | $215,844 (HOME)-Allocated/$228,974 Final Allocation due to Final HUD Allocation |
| Description | To Provide Down Payment Assistance to eligible homebuyers under the established County Program. |
| Target Date | 2023 |
| Estimate the number and type of families that will benefit from the proposed activities | 9 Families helped with Homeownership |
| Location Description | Marion County Service Area |

|  |  |
| --- | --- |
| **Project Name** | **Administration** |
| Target Area | Marion County Service Area |
| Goals Supported | Support Program Success |
| Needs Addressed | Administration of Activities/Programs |
| Funding | $ 312,238 (CDBG) Allocated/$289,217 Final Allocated Amount  $ 62,112 (HOME) Allocated/$63,863 Final Allocated Amount |
| Description | Provide for administrative costs for HOME and CDBG Programs |
| Target Date | 7/1/2022 |
| Estimate the number and type of families that will benefit from the proposed activities | N/A |
| Location Description | N/A |

AP-50 Geographic Distribution 91.220 (f)

Description of the geographic areas of the entitlement

(Including areas of low-income and minority concentration)

where assistance will be directed.

While funds are not specifically targeted to areas of low-income and minority concentration the funding of Mid-Willamette Habitat for Humanity and Boys & Girls Club are within low-to-moderate income areas in Marion County’s jurisdiction. This will enhance services to low-income families with children.

Down Payment Assistance is a program that can go be utilized county-wide.

The CHDO Set-Aside is to be determined so there is not a specific geographical area that the assistance is being targeted.

Funds utilized for the purchase of the property for Soaring Heights are not being targeted to a geographic area as it is client based whereby all clients must be income eligible at the time they enter into the organization for services.

**Geographic Distribution**

**Table 12: Geographic Percentages**

|  |  |
| --- | --- |
| Target Area | Percentage of Funds |
| LMI Areas | 15% (CDBG Funds)/10% Overall (Excluding HOME-ARP) |
| Marion County Service Area | 85% (CDBG Funds)/90% Overall (Excluding HOME-ARP) |

**Rationale for the priorities for allocating investments geographically**

Funds were not specifically prioritized geographically except for the disaster recovery funds. While the above distribution includes Boy’s and Girls Club funding it was a residue affect due to the location of where the new Epping Center will open.

**Discussion**

With projects still to be determined and additional funds coming for disaster recovery, the intent of targeting funds to certain Low-to-Moderate Income Areas may still occur. If funds are moved and targeted for LMI Areas then it will be reported on the CAPER which will be due to HUD in September 2023.

AP-55 Affordable Housing – 91.220 (g)

**Table 13: Affordable Housing Goals**

|  |  |
| --- | --- |
| One Year Goals for the Number of Households to be Supported | |
| Homeless | 5 |
| Non-Homeless | N/A |
| Special-Needs | N/A |
| Total | 0 |

|  |  |
| --- | --- |
| One Year Goals for the Number of Households Supported Through | |
| Rental Assistance | N/A |
| Production of New Units | 3 |
| Rehab of Existing Units | N/A |
| Acquisition of Existing Units | 5 |
| Total | 8 |

With providing funding for Soaring Heights to acquire their existing property there is an anticipation that this will enable the non-profit to expand services by acquiring an additional property. Marion County anticipates Soaring Heights to acquire a property that can house five (5) additional households. Soaring Heights qualifies as a public facility for transitional housing for homeless populations.

The three (3) additional new units being built is in conjunction with Mid-Willamette Habitat for Humanity building two (2) homes and the unidentified CHDO project.

AP-60 Public Housing – 91.220 (h)

The Marion County Housing Authority continues to own and operate affordable housing options as well as the Housing Choice Vouchers in the County.

**Actions Planned during the next year to address the needs to public housing**

Marion County is continuing to be in communication with the Housing Authority on two potential projects. One project is for capital improvements to a property in Woodburn and the other is either a rehabilitation project in Silverton or construction of new units. Currently both properties are tied to Farmworker Housing and have thirteen (13) years remaining on the terms of the original agreement.

**Actions to encourage public housing residents to become more involved in management and participate in homeownership.**

Marion County Housing Authority administers a family self-sufficiency program. The Housing Authority also executed an MOU with DevNW to refer Family Self-Sufficiency participants to DevNW for participation in their suite of services starting with financial education and home ownership courses and including access to Individual Development Accounts which can be used for down payment assistance.

**If the PHA is designated as troubled, describe the manner in which financial assistance will be provided or other assistance.**

The Marion County Public Housing Authority is not designated as troubled.

**Discussion**

Marion County CDBG/HOME Program will continue to collaborate with the Public Housing Authority on potential projects for funding in the future. The County looks forward to the Housing Authority to be able to expand its services to additional locations within the community.

AP-65 Homeless and Other Special Needs Activities- 91.220 (i)

**Describe the Jurisdictions One-Year goals and actions for reducing and ending homelessness including:**

***Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs***

The Mid-Willamette Valley Homeless Alliance (MWVHA), which is the coalition of local homeless services agencies, works with area service providers in conducting assessments of homeless individuals, including unsheltered persons, through the Coordinated Entry System.

Marion County continues to assess the needs of homeless individuals and funding opportunities. It is also aware of the need of different areas of the county as although the county is considered Urban there are vastly different needs between its more established populated areas of Keizer, Woodburn, and East Salem compared to the more rural canyon areas of Mill City, Stayton, Detroit, and Idanha

***Addressing the Emergency Shelter and Transitional Housing Needs of Homeless persons***

As part of the Consolidated Plan Marion County identified homelessness as a priority. To address this, the Board of Commissioners have directed funding to a local non-profit who operates a transitional housing unit so they can acquire the property. It is expected that the funds that the non-profit was using for rent on the property will be redirected for the use of acquiring additional property for transitional housing.

Marion County is also assisting wildfire victims by establishing non-congregate shelter in the form of tiny homes within the City of Gates and the North Santiam Park. It is expected that a total of 32 units will become available and Marion County Public Housing Authority will be overseeing the units.

***Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) made the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again.***

Mid-Willamette Valley Homeless Alliance (MWVHA) strategic goals include utilizing the resources of Rapid Rehousing and expanding permanent supportive housing to address the needs of chronically homeless individuals. The Mid-Willamette Valley Homeless Alliance received $3.7 million in funding and was one of seventy-seven (77) communities across the nation to work with a team of technical assistance providers and implement youth-led strategies to address homelessness for you and young adults in the region. MWVHA is currently going through the process to award funding to applicants to address the needs of homeless youth. Currently the YMCA is in construction on a brand-new facility that will also contain apartment units for veterans. Marion County will continue to collaborate with organizations to help alleviate chronically homeless individuals.

***Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are; being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other you facilities, and corrections programs in institutions); or, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs.***

Marion County will continue to assess ways in which it can help homeless/at risk of homelessness populations. With the funding allocated to Soaring Heights, it is expected that the organization will expand and be able to offer services to formerly incarcerated individuals as this population is part of the clientele they serve. Marion County has been made aware that there are existing expiring contracts on properties that are utilized by individuals with disabilities, and this may be an alternative avenue to help an at-risk population of becoming homeless.

AP-75 Barriers to Affordable Housing

***Actions it planned to remove or ameliorate the negative effects of public polies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitation, and policies affecting the return on residential investment.***

As part of the Consolidated Plan submitted in 2021 a survey was conducted to determine what the community perceived to be barriers to affordable housing. The result of the survey is in table 14 below:

**Table 14: Barriers to affordable housing**

Table

Description automatically generated

In 2019 the state of Oregon passed House Bill 2001 which required all cities with a population over 10,000 people to update their zoning codes to allow for duplexes wherever single-family zoning occurred. This in effect removes single family zoning in all cities with a population over 10,000. As noted in the survey results above there are not a lot of factors that a county can have a direct impact on such as the cost of materials or land. However, there are a couple of areas that the county continually receives input on such as the permitting/approval process and police patrol. Marion County recognizes that if a community is not safe, that alone will cause a barrier to get any housing built let alone affordable housing. Marion County is a strong supporter of homeownership as a way to bring families together and increase the viability of neighborhoods. Marion County will continue to focus on way sit can limit barriers to affordable housing including creating its own fair housing program in conjunction with receiving funding from HUD as it continues to develop its program over the course of this first consolidated plan cycle.

AP-85 Other Actions- 91.220 (k)

**Actions planned to address obstacles to meeting underserved needs**

Marion County recognizes the unique situation that enabled it to become an Entitlement Community. With approximately 40,000 people living in East Salem, Marion County would not meet the qualifications of an Urban County if a majority of East Salem was incorporated into the city of Salem. This unique situation coupled with the affordable housing crisis, homelessness, and disaster recovery are the components guiding the PY2022-2023 Annual Action Plan.

In conjunction with the information above the County also intends to further develop capacity over the course of its first consolidated plan cycle to expand on its current policies while adjusting its consolidated plan to align with new priorities of the County and its citizens. The emphasis on affordable housing development and homelessness is shown in the priorities of funding of the CHDO, acquisition of Transitional Housing, providing subsidies to build affordable housing and providing funds for operating/equipment costs for services by non-profits in Low-to-moderate income areas.

**Actions planned to foster and maintain affordable housing**

Marion County will continue to engage developers, non-profits and encourage the creation of new non-profits who will help foster and maintain affordable housing. This is not limited to just new development of housing it can come in the form of nonprofits obtaining existing housing to be utilized by targeted populations such as developmentally disabled individuals or former drug offenders.

Under the PY2022-2023 plan, Marion County is allocating funding for both new development and transitional housing. It will also continue to work on housing projects in the disaster recovery area and throughout the county.

**Actions planned to reduce lead-based paint hazards**

Marion County does not anticipate spending any funds to abate lead-based paint hazards, but it will follow all federal requirements on lead if it is required.

**Actions planned to reduce the number of poverty-level families**

Marion County identified two (2) main focuses within the Consolidated Plan to reduce the number of poverty-level families.

1.) **Encourage Economic Development**: While Marion County is working on creating this program the intent is that by helping encourage job growth families will be able to move out of poverty.

2.) **Direct Homeowner Assistance**: By providing down payment assistance for low-income families to obtain homeownership families will be able to build equity over time and that equity will be able to help reduce poverty over time.

**Actions planned to develop institutional structure**

As previously indicated Marion County will be reevaluating policies and procedures on an ongoing basis as it continues to operate its program. Marion County already has made strides over the past year on how to meet HUD requirements and it anticipates additional input from community partners/county departments will continue to help guide future allocations of funding.

**Actions planned to enhance coordination between public and private housing and social service agencies**

Marion County has made progress over the first year in identifying organization that it can help partner with or link to other organizations to help develop projects. This will be a main focus of staff over the PY2022-2023 funding cycle because there are new organizations starting and the local continuum of care has only been in existence for less than five (5) years so growing capacity between organizations/non-profits/ the private sector and service agencies is vital to the success of the programs.

Marion County is already going to be holding a CHDO informational meeting on May 4th, 2022, to help inform potential developers/organizations the qualifications for becoming a CHDO, how funds can be utilized and the overall Marion County program.

**AP-90 Program Specific Requirements- 91.220 (i) (2,3,4)**

***Community Development Block Grant Program (CDBG)***

***Reference 24 CFR 91.220(l)(1)***

Projects planned with all CDBG funds expected to be available during the year are identified in the projects Table. The following identifies program income that is available for use that is included in projects to be carried out:

**Table 15: Program Income**

|  |  |
| --- | --- |
| The total amount of program income that will have been received before the state of the next program year and that has not yet been reprogrammed | **$0** |
| The amount of proceeds from section 108 loan guarantees that will be used ruing the year to address the priority needs and specific objectives identified in the grantees strategic plan | **$0** |
| The amount of surplus funds from urban renewal settlements | **$0** |
| The amount of any grant funds returned to the line of credit for which the planned use has not been included in a prior statement or plan | **$0** |
| The amount of income from float-funded activities | **$0** |
| Total Program Income | **$0** |

**Other CDBG Requirements**

|  |  |
| --- | --- |
| The amount of urgent need activities | **$0** |

**HOME Investment Partnership Program (HOME)**

**Reference 24 CFR 91.220 (I)(2)**

***1. A Description of other forms of investment being used beyond those identified in Section 92.205 is as follows:***

The HOME Funds allocated are not being utilized for any forms of investments beyond those identified in Section 92.205

***2. A description of the guidelines that will be used for resale or recapture of HOME funds when used for Homebuyer Activities in 92.254, is as follows:***

**Marion County-Recapture/Resale Policy**

**April 2022**

**Introduction**

Marion County is a participating jurisdiction in HUD’s HOME Investment Partnerships Program. Federal regulations require the County to establish written recapture/resale policies that comply with HOME statutory and regulatory requirements for the purpose of carrying out HOME-assisted homeownership activities. These policies are set forth in the Annual Action Plan and clearly describe the recapture/resale provisions, the specific circumstances under which these provisions will be used, and how the County will enforce the provisions for HOME-funded homeownership projects. HUD reviews and approves the provisions as part of the Annual Action Plan process.

The purpose of this section is to provide the policies for the Marion County’s HOME Investment Partnerships Program. Marion County may use HOME funds for different types of programs to assist with single-family residences:

* Down Payment Assistance provided to new homebuyers
* New Construction of Affordable Housing

**2022 Homebuyer Projects**

The 2022 Annual Action Plan will include two homebuyer activities:

* **Down Payment Assistance**- HOME funds will be used to provide down payment assistance for up to 9 households
* **New Construction**- HOME funds will be used in conjunction with a CHDO as a development subsidy for the construction of a to be determined number of homes and for the construction of two (2) homes in East Salem via Habitat for Humanity.

The Down Payment Assistance will be subject to the recapture provisions and the New Construction will be subject to Resale Provisions.

**General HOME Property Restrictions**

For a homebuyer or homeowner to be eligible for HOME assistance, they must have an income at or below 80% of area median income, as provided by HUD. The household must be purchasing, constructing, or rehabilitating a home that they intend to maintain as their primary residence. Depending on the amount of HOME assistance provided to the residence, the property must remain affordable for the number of years indicated in the County’s written agreement with the homebuyer. If the property is sold during this time, or if it is no longer the primary residence of the household, the recapture/resale provisions will be enforced.

**Recapture Policy**

Marion County uses a “recapture” model for the down payment assistance program to assist homebuyers in the purchase of a new home. Under HOME recapture provisions, financial assistance is provided directly to the buyer or the homeowner and must be repaid if the property is sold during the affordability period. Once the funds are repaid to Marion County the property is no longer subject to any HOME restrictions and the County may then use the funds for other HOME-eligible activities. Recapture will be enforced over a 99-year period for the Homeownership Program.

**Homeownership Program**: As a new entitlement community receiving funds from HUD Marion County is establishing its first down payment assistance program. A maximum amount of $25,000 can be acquired for down payment assistance from an eligible homebuyer. HOME assistance will be in the form of a 0% interest, deferred payment loan whereby 100% of the amount provided must be repaid if sold within the first 5 years and then from years 6-10, the loan will decline $3,000 a year until there is $10,000 remaining balance. After 10 years, the remaining $10,000 will remain on the property as a 99-year lien until the property is sold and the funds are paid back to the county. The $25,000 may be increased program-wide at the County’s discretion based on need and housing prices. Underwriting will be conducted on each property to determine the amount of subsidy to contribute to each household. A written agreement, signed by all parties, in the form of a promissory note and trust deed will serve as the security for these loans. The lien will be recorded in the land records of Marion County. If an increase of down payment assistance is determined to be needed by the County and it results in over $40,000 or more in assistance the County will update its recapture provisions to determine an appropriate finance mechanism.

To satisfy the recapture requirement, the home buyer must pay back the direct HOME Subsidy at the time of sale, transfer, or if they no longer occupy the property as the primary residence. *Recapture is calculated by taking the sales price minus loan repayments (Non-HOME loan) and closing costs. This amount is the “Net Proceeds.”* ***The County’s recapture is limited to the net proceeds****, if any.*

Marion County will prorate all loans based upon the exact amount of assistance provided as permitted by the underwriting policy of the County.

Explanation of Recapture:

Sales price – loan debt (non-HOME debt) – closing costs = Net Proceeds (HOME amount to be recaptured, if any.)

Net Proceeds – direct HOME Subsidy = Equity (if any)

Example

$150,000 - $120,000 (1st Mortgage) - $5,000 (closing Costs) = $25,000 (Net proceeds available for recapture).

$25,000 due if sold in Year 1

$25,000 due if sold in Year 2

$25,000 due if sold in Year 3

$25,000 due if sold in Year 4

$25,000 due if sold in Year 5

$22,000 due if sold in Year 6

$19,000 due if sold in Year 7

$16,000 due if sold in Year 8

$13,000 due if sold in Year 9

$10,000 due if sold in Year 10

$10,000 due at time of sale after year 10

*Additional Example (If there is less than $25,000 being loaned)*

If $10,000 is being loaned then the following mechanism will apply

$10,000 due if sold in Year 1-5

Since $10,000 is 40% of $25,000 the prorated decline each year from years 6-10 will result in 40% of the original loaned amount due after 10 years. In this example that would be $4,000, over years 6-10, the amount due would decline based upon $6,000 in equal intervals over the five-year period (i.e. $6,000/5 years = $1,200 decline each year) reaching the $4,000 amount owed after 10 years.

**Resale Policy**

The resale method is used when Marion County provides funding directly to a developer as a subsidy to reduce development costs, thereby, making the price of the home affordable to the buyer. Commonly referred as a “Development Subsidy,” these funds are not repaid by the developer to the County but remain with the property for the term of affordability. These subsidies are subject to resale provisions. It is the policy of the Marion County Board of Commissioners to offer development subsidies up to the maximum amount permitted by HUD.

When resale is triggered during the Period of Affordability, the Developer/Sponsor or Subrecipient shall notify the County who will:

1) Agree to the new sale price with consultation from the Subrecipient and written determination from a realtor or appraiser;

2) Confirm the Fair Return calculation to the seller and/or County;

3) Review the income eligibility of the subsequent buyer; and

4) Determine the amount of time left to assume on the Period of Affordability.

The HOME statue states that “resale provision must limit subsequent purchase of the property to income-eligible families, provided the owner with a fair return on investment, including any improvements, and ensure that the housing will remain affordable to a reasonable range of low-income homebuyers.”

Marion County’s policy is to assist households whose income is between 60-80% of AMI through its HOME-funded homeownership activities. Marion County considers affordability as a household spending no more than 30% of its income on the fixed costs of owning a home (payments of principle, interest, taxes, and insurance).

If the housing is voluntarily transferred during the term of affordability, it must be made available for subsequent purchase to a buyer who qualifies as low-income and will use the home as the family’s principal residence.

The property obtained must always be the homebuyer’s principal residence during the term of affordability.

Homebuyers must enter into a restrictive covenant outlining resale requirements.

Restrictive covenants between the original homebuyer and the county must be signed prior to purchase. This must state the amount of HOME subsidy, the Period of Affordability, and state the Fair Return provision. The new homebuyer must be low or moderate income, meeting the HOME Program definition, and occupy the property as the principal residence during the remaining term of affordability.

Deed Restrictions on the property and Promissory Note must be executed and recorded by the Developer/Sponsor or Subrecipient on behalf of the County. It must include the number of years for the Period of Affordability; the amount of HOME subsidy used by the homebuyer; the terms of occupancy required as principal residence; and the restriction of the property’s sale to income-eligible homebuyers during the remaining term of affordability.

New HOME funds invested for a subsequent low-income homebuyer at resale, will extend the period of affordability according to the HOME guidelines.

Pre-payment of HOME funds does not terminate the Period of Affordability. The owner will be required to reside in the unit the Period of Affordability has concluded. The exception to this is the sale of the residence or foreclosure.

**Fair Return on Investment**

Marion County will administer its resale provisions by ensuring that the original homebuyer receives a fair return on his/her investment and that the home will continue to be affordable to a specific range of incomes. Fair Return on Investment means the total homeowner investment, which includes the total cash contribution plus the approved capital improvements credits as described.

1.) The amount of the down payment at the time of purchase;

2.) The cost of any capital improvements, documented with receipts provided by the homeowner (and approved by), including but not limited to:

1. Any additions to the home such as a bathroom, bedroom or garage
2. Replacement of HVAC systems
3. Accessibility improvements (bathroom modifications for disabled or elderly, installation of wheel chair ramps and grab bars, etc.) any and all of which must have been paid for directly by the homeowner and were not installed with federal, state, or locally funded grant programs; and
4. Outdoor improvements (driveways, walkway, retaining wall, or fence)

Note: All capital improvements will be visually inspected to verify existence.

3.) The percentage of change as calculated by the Housing Price Index (HPI) Calculator of the federal Housing Finance Agency. The HPI Calculator is currently located at <http://wwwfhfa.gov/datatools/tools/pages/HPICalculator.aspx> and projects what a given house purchased at a point in time would be worth today if it appreciated at the average rate of all homes in the area.

**Calculating Fair Return on Investment**

Down Payment: The original amount of money the homebuyer was required to put down in earnest and was not returned to the homebuyer at closing.

For Example: homebuyer made a down payment of $1000.

Cost of capital improvements: Any capital improvements that were made by the original homebuyer. The project was originally approved, receipts were provided and a visual inspection confirms the project is still in existence.

For example: homebuyer had a privacy fence installed at the cost of $1,500 and provides receipts; inspection supports that fence is there; verified it was approved.

Principal Paid: Amount of money that the original homebuyer has paid towards the loan

For example: The original homebuyer’s mortgage was $55,000 at 6.75% interest for 30 years and has made payments for 48 months. The current mortgage balance is $52,460. The principal amount paid is $2,540.

Percentage of Change: Using the Federal Housing Finance Agency’s Housing Price index for a quantitative measure of change in the value of a property.

For Example: The original homebuyer purchased the house for $55,000 and the amount of developer subsidy was $25,000; requiring a 10-year term of affordability. For the purposes of calculating the HPI, the home was purchased in the 3rd quarter of 2010, and be calculated using the most current quarter available, 1st quarter 2014. Using the HPI calculator, the house would be $16,147.

Calculating the Fair Return to the original homebuyer

Down Payment: $1,000

Capital Improvements: $1,500

Principal Paid: $2,540

Increase Value: $16,147

$21,187 Fair Return on Investment

In order to realize a fair return on investment to the original homebuyer, the sales price must be set at roughly $73,700 (i.e., $55,000 ($2,540 in principal payments made plus remaining mortgage balance $52,460) + $1,000 down payment + $1,500 capital improvements + $16,147 HPI increase $73,647

If the property is sold to an eligible HOME borrower (meet income eligibility guidelines) and the debt to ratios do not exceed 30% of the annual household income; then the borrower could assume the mortgage at the at the prorated amount left.

**Continued Affordability**

HOME-assisted properties subject to resale requirements must be affordable to low-income homebuyers. Affordable is defined as household income at or below 80 percent of area median income: no more than 30% of household income on housing debt (principal, interest, mortgage insurance, property taxes, insurance, etc.)

Non-compliance with the residency requirement will necessitate the immediate repayment of HOME funds invested into the property unless the house is re-occupied by the original homebuyer or subsequently sold.

Resale is triggered when the house is sold or occupied by a household other than the original homebuyer during the term of affordability and a direct subsidy was provided to a developer.

When resale is triggered during the Period of Affordability, the Developer/Sponsor or Subrecipient shall notify the County who will:

1.) agree to the new sale price with consultation from the Subrecipient and written determination from a realtor or appraiser

2.) confirm the Fair return calculation to the seller and/or the County

3.) review the income eligibility of the subsequent buyer; and

4.) determine the amount of time left to assume on the period of affordability

New HOME funds invested for a subsequent low-income homebuyer at resale, will extend the period of affordability according to the HOME guidelines

Marion County will use a market rate (fee simple) appraisal conducted by an independent, state licensed appraiser to establish the value of the property prior to the initial purchase of the home, Marion County follows the standard practice for all real estate purchase transactions. By obtaining a new market rate fee simple appraisal, upon notice of intent to sell by the homebuyer, the County ensures that standard methods for determining property values are always used. In this way, market values are easily measured, professionally determined, and publicly accessible. No subjective judgments are made by the County or the homeowner as to what constitutes value and how value is determined.

Pre-payment of HOME funds will not terminate the Period of affordability. The owner will be required to reside in the unit until the Period of Affordability has concluded. The exception to this is the sale of the residence or foreclosure.

The County may invest additional HOME funds to preserve affordability of the unit in the event of foreclosure.

The County will seek to collect the HOME investment due if the house is sold or goes into foreclosure and no subsequent qualified low-income homebuyer can be identified. The collection will be limited to the net proceeds available.

Appendix

**Disaster Recovery Work Session Minutes**

**CHDO Informational Meeting Letter**

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**CHDO Informational Meeting Minutes**

**CDBG/HOME Input Meeting Letter**

Text

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**CDBG/HOME/HOME-ARP Input Meeting Minutes**

**Public Hearing Notice**

Text, letter

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**Public Hearing Minutes**