

April 25, 2024

BCC Agenda Date/Item: _____

Housing Authority Board of Commissioners
 Clackamas County

Approval to apply for a Multifamily Incentive Package from the Energy Trust of Oregon to promote sustainable building systems at the Hillside Park Redevelopment Project. The grant value is up to \$100,000. Funding is through Energy Trust of Oregon. No County General Funds are involved.

Previous Board Action/Review	April 23, 2024 – Item presented at Issues		
Performance Clackamas	This funding aligns with the County’s strategic priority to ensure safe, healthy, and secure communities by developing a more energy-efficient property at the Hillside Park location.		
Counsel Review	Yes	Procurement Review	No
Contact Person	Devin Ellin, Director of Housing Development, HACC	Contact Phone	971-227-0472

EXECUTIVE SUMMARY: The Housing Authority of Clackamas County (HACC), a component unit within the Housing and Community Development Division of the Health, Housing and Human Services Department, is requesting approval to apply for up to \$100,000 in Multifamily Incentive funding from the Energy Trust of Oregon to support energy efficiency for the Hillside Park Redevelopment Project.

The Energy Trust of Oregon is investing in cost-effective energy efficiency, helping to pay the above-market costs of renewable energy resources, delivering services with low administrative and program support costs, and maintaining high levels of customer satisfaction. Energy Trust offers cash incentives for the installation of qualified energy-efficient equipment at multifamily buildings through its Multifamily Incentives program. If awarded, this funding will be used to pay for energy-efficient appliances and improvements, including helping to fund the photovoltaic solar arrays. Investments made with this funding will reduce operational energy and utility costs, limiting the cost burden of utilities for future residents.

The application has a rolling deadline, and staff have set a target submission date of June 2024 to align with the Hillside Redevelopment Project timeline. The grant has no matching fund requirement, and no County General Funds are involved. Funding from this grant will be braided with other funding sources already committed to the Hillside Redevelopment Project.

RECOMMENDATION: Staff recommends the board approve staff to apply for a Multifamily Incentive Package from the Energy Trust of Oregon to promote energy efficiency at the Hillside Park Redevelopment Project.

Respectfully submitted,

Rodney A. Cook

Rodney A. Cook
 Director of Health Housing and Human Services

For Filing Use Only

Financial Assistance Application Lifecycle Form

Use this form to track your potential award from conception to submission.

Sections of this form are designed to be completed in collaboration between department program and fiscal staff.

If renewal or direct appropriation, complete sections I, II, IV & V only. Section III is not required.

If Disaster or Emergency Relief Funding, EOC will need to approve prior to being sent to the BCC

****CONCEPTION****

Section I: Funding Opportunity Information - To Be Completed by Requester

Award type: Direct Appropriation (no application) Subrecipient Award Direct Award

Award Renewal? Yes No

Lead Fund # and Department:	610 - HS - Housing Authority
Name of Funding Opportunity:	Energy Trust of Oregon

Funding Source: Federal – Direct Federal – Pass through State Local

Requestor Information: (Name of staff initiating form)	Devin Ellin - HACC Director of Development
Requestor Contact Information:	Dellin@clackamas.us - 971-227-0472
Department Fiscal Representative:	Darren Chilton
Program Name & Prior Project #: (please specify)	Hillside Park Redevelopment - Clackamas County Housing Authority - Development

Brief Description of Project:

The Hillside Park site in Milwaukie, Oregon is being redeveloped to create a safe, healthy, and secure community by replacing 100 units of near-obsolete public housing with up to units of newly constructed affordable housing. Phase 1 of the Hillside Park Redevelopment project will replace 54 units of deteriorating public housing with 275 units of newly constructed housing affordable to households with incomes at or below 60% of the Area Median Income (AMI). This grant award will help fund energy efficiencies within the project such as appliances and solar arrays.

Name of Funding Agency: Energy Trust of Oregon

Notification of Funding Opportunity Web Address: <https://www.energytrust.org/programs/multifamily/>

OR

Application Packet Attached: Yes No

Completed By: _____ Date: _____

**** NOW READY FOR SUBMISSION TO DEPARTMENT FISCAL REPRESENTATIVE ****

Section II: Funding Opportunity Information - To Be Completed by Department Fiscal Rep

Competitive Application Non-Competing Application Other

Assistance Listing Number (ALN), if applicable:	N/A	Funding Agency Award Notification Date:	Rolling
Announcement Date:	Rolling	Announcement/Opportunity #:	N/A
Grant Category/Title	Energy Efficiency & Solar Grants	Funding Amount Requested:	\$100,000
Allows Indirect/Rate:	N/A	Match Requirement:	N/A
Application Deadline:	Rolling	Total Project Cost:	\$160,000,000
Award Start Date:	June 2024	Other Deadlines and Description:	
Award End Date:	June 2026		
Completed By:		Program Income Requirements:	N/A
Pre-Application Meeting Schedule:	Meeting with Related, HACC Development Team & HACC Finance Team		

Additional funding sources available to fund this program? Please describe:
 Low Income Housing Tax Credits (LIHTCs), Private Activity Bonds, State and Local funding sources, Grants

How much General Fund will be used to cover costs in this program, including indirect expenses?
 No County General Funds are involved

How much Fund Balance will be used to cover costs in this program, including indirect expenses?
 N/A

In the next section, limit answers to space available.

Section III: Funding Opportunity Information - To Be Completed at Pre-Application Meeting by Dept Program and Fiscal Staff

Mission/Purpose:

1. How does the grant/funding opportunity support the Department and/or Division's Mission/Purpose/Goals?

The Hillside Park site in Milwaukie, Oregon is being redeveloped to create a safe, healthy, and secure community by replacing 100 units of near-obsolete public housing with up to 500 units of newly constructed affordable housing. Phase I of the Hillside Park redevelopment project will replace 54 units of deteriorating public housing with 275 units of newly constructed housing affordable to households with incomes at or below 60% of the AMI. Energy efficiency to decrease tenant costs/utilities is a focus of this project.

2. Who, if any, are the community partners who might be better suited to perform this work?

N/A

3. What are the objectives of this funding opportunity? How will we meet these objectives?

Energy Trust began operation in March 2002, charged by the Oregon Public Utility Commission with investing in cost-effective energy efficiency, helping to pay the above-market costs of renewable energy resources, delivering services with low administrative and program support costs and maintaining high levels of customer satisfaction. This financing will be used to pay for energy efficient appliances and improvements, as well as to help fund the photovoltaic solar arrays anticipated at Hillside Park. The funds will be used to fund a portion of the total project cost.

4. Does the grant/financial assistance fund an existing program? If yes, which program? If no, what is the purpose of the program?

This grant funding is intended to promote sustainable building systems at Hillside Park, thereby reducing operational energy burdens and utility costs at the project.

Organizational Capacity:

1. Does the organization have adequate and qualified staff? If no, can staff be hired within the grant/financial assistance funding opportunity timeframe?

Yes

2. Are there partnership efforts required? If yes, who are we partnering with and what are their roles and responsibilities?

HACC is the current landowner and will retain long term ownership of the property after the redevelopment's completion. The Energy Trust of Oregon has an existing relationship with Related due to its partnerships around other affordable housing projects.

3. If this is a pilot project, what is the plan for sun setting the project and/or staff if it does not continue (e.g. making staff positions temporary or limited duration, etc.)?

N/A

4. If funded, would this grant/financial assistance create a new program, does the department intend for the program to continue after initial funding is exhausted? If yes, how will the department ensure funding (e.g. request new funding during the budget process, supplanted by a different program, etc.)?

No, this will add to other funding sources to further the redevelopment of Hillside Park.

Collaboration

1. List County departments that will collaborate on this award, if any.

N/A

Reporting Requirements

1. What are the program reporting requirements for this grant/funding opportunity?

TBD if awarded. Will likely be similar to other reporting requirements of additional funding to this project.

2. How will performance be evaluated? Are we using existing data sources? If yes, what are they and where are they housed? If not, is it feasible to develop a data source within the grant timeframe?

TBD - performance will likely be related to the final energy efficiency of the project.

3. What are the fiscal reporting requirements for this funding?

TBD if awarded. Will likely be standard grant reporting requirements.

Fiscal

1. Are there other revenue sources required, available, or will be used to fund the program? Have they already been secured? Please list all funding sources and amounts.

Metro Housing Bonds \$40M, congressionally directed spending \$4M, City of Milwaukee CET \$1.7M, OHCS LIFT funds \$6.65M, HOME and HOME-ARP funds \$8.2M, and other funding sources.

2. For applications with a match requirement, how much is required (in dollars) and what type of funding will be used to meet it (CGF, In-kind, local grant, etc.)?

N/A

3. Does this grant/financial assistance cover indirect costs? If yes, is there a rate cap? If no, can additional funds be obtained to support indirect expenses and what are those sources?

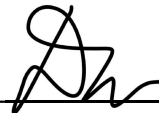
N/A

Other information necessary to understand this award, if any.

Program Approval:

Devin Ellin

4/4/2024



Name (Typed/Printed)

Date

Signature

**** NOW READY FOR PROGRAM MANAGER SUBMISSION TO DIVISION DIRECTOR ****

****ATTACH ANY CERTIFICATIONS REQUIRED BY THE FUNDING AGENCY. COUNTY FINANCE OR ADMIN WILL SIGN****

Section IV: Approvals

DIVISION DIRECTOR (or designee, if applicable)

Toni Karter

4/4/24

Toni Karter

Name (Typed/Printed)

Date

Signature

DEPARTMENT DIRECTOR (or designee, if applicable)

Denise Swanson

Apr 8, 2024

Denise Swanson

Denise Swanson (Apr 8, 2024 17:15 PDT)

Name (Typed/Printed)

Date

Signature

FINANCE ADMINISTRATION

Elizabeth Comfort

Apr 9, 2024

Elizabeth Comfort

Name (Typed/Printed)

Date

Signature

EOC COMMAND APPROVAL **WHEN NEEDED FOR DISASTER OR EMERGENCY RELIEF APPLICATIONS ONLY**

Name (Typed/Printed)

Date

Signature

Section V: Board of County Commissioners/County Administration

(Required for all grant applications. If your grant is awarded, all grant awards must be approved by the Board on their weekly consent agenda regardless of amount per local budget law 294.338.)

For applications \$150,000 and below:

COUNTY ADMINISTRATOR	Approved:	Denied:
Name (Typed/Printed)	Date	Signature

For applications up to and including \$150,000 email form to BCC staff at CA-Financialteam@clackamas.us for Gary Schmidt's approval.

For applications \$150,000.01 and above, email form with Staff Report to the Clerk to the Board at ClerktotheBoard@clackamas.us to be brought to the consent agenda.

BCC Agenda item #:

Date:

OR

Policy Session Date:

County Administration Attestation

County Administration: re-route to department at
and
Grants Manager at financegrants@clackamas.us
when fully approved.

Department: keep original with your grant file.