

**HOUSING and COMMUNITY SERVICES, OREGON**

**Annual Performance Progress Report (APPR) for Fiscal Year (2007-2008)**

**Proposed KPM's for Biennium (2009-2011)**

Original Submission Date: 2008

2007-2008 KPM #	2007-2008 Approved Key Performance Measures (KPMs)
1 a	Affordable Home Ownership – Percent of residential loans closed that provide homeownership to individuals at A) 100% applicable median income and below.
1 b	Affordable Home Ownership – Percent of residential loans closed that provide homeownership to individuals at B) 90% applicable median income and below.
1 c	Affordable Home Ownership – Percent of residential loans closed that provide homeownership to individuals at C) 80% applicable median income and below.
2	Affordable Home Ownership Education – Percent of approved mortgage loans through OHCS that are for recipients who have completed The ABC's of Homebuying within the previous two years.
3	Reducing Homelessness – Percent of households that entered a housing program in either a homeless or at-risk status that exited to a stable housing situation.
4	Affordable Rental Housing through Bonds – Percent of housing units developed through the issuance of tax-exempt bonds that provide affordable rental opportunities for individuals at 60% or below area median income.
5 a	Affordable Rental Housing through Grants – Percent of housing units developed through the Department's Consolidated Funding Cycle and other processes that provide affordable rental opportunities for individuals at A) 60% area median income and below.
5 b	Affordable Rental Housing through Grants – Percent of housing units developed through the Department's Consolidated Funding Cycle and other processes that provide affordable rental opportunities for individuals at B) 50% area median income and below.
5 c	Affordable Rental Housing through Grants – Percent of housing units developed through the Department's Consolidated Funding Cycle and other processes that provide affordable rental opportunities for individuals at C) 40% area median income and below.
5 d	Affordable Rental Housing through Grants – Percent of housing units developed through the Department's Consolidated Funding Cycle and other processes that provide affordable rental opportunities for individuals at D) 30% area median income and below.
6	Increasing Energy Savings – For all funds invested, the percent of energy savings generated from the Department's Energy Conservation Helping Oregonians (ECHO) weatherization program.
7	Increasing Housing for Special Needs Individuals – Percent of housing units developed that provide rental opportunities for the elderly and individuals with special needs.
8	Agency Customer Service – Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent:" timeliness, accuracy, helpfulness, expertise, availability of information, overall.

<b>2007-2008 KPM #</b>	<b>2007-2008 Approved Key Performance Measures (KPMs)</b>
9	Food Insecurity – Percent of pounds in donated food distributed through Oregon Food Bank that are processed or repackaged bulk food purchased through the General Fund Food Program.

New Delete	Proposed Key Performance Measures (KPM's) for Biennium 2009-2011
NEW	<p><b>Title:</b> Construction Costs – Cost per square foot for housing units developed through Grant and Tax Credit programs.</p> <p><b>Rationale:</b> Construction costs vary widely depending on the type of building, the amount of common space, and many other factors. This measure uses RSMeans, a nationally recognized standard for the average costs measure, and compares this number to our average project cost for units developed through our Grant and Tax Credit programs. The use of these averages helps to mitigate the differences between types of buildings.</p> <p>Development costs for OHCS projects often cost more than average projects due to a number of factors, including the suitability of available land. For this reason, our goal is to be no more than 5% above the RSMeans average.</p>
DELETE  (KPM#2)	<p><b>Title:</b> Affordable Home Ownership Education – Percent of approved mortgage loans through OHCS that are for recipients who have completed The ABC's of Homebuying within the previous two years.</p> <p><b>Rationale:</b> In 2008, OHCS did not collect data on this measure as we discontinued the practice of reimbursing sponsors for offering this training. Data was provided for the fiscal year from the Department's Loan Information Processing System. This data was subject to some error since the applicants provided information about participating in these programs on a voluntary basis. We no longer receive this data.</p>

**Agency Mission:**

Provide leadership that enables Oregonians to gain housing, become self-sufficient, and achieve prosperity.

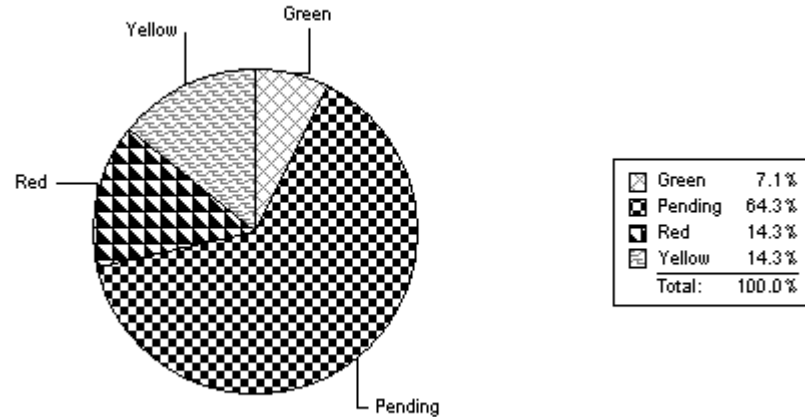
**Contact:** Bill Carpenter

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**Alternate Phone:** 503-986-2076

**Performance Summary**



**1. SCOPE OF REPORT**

Oregon Housing and Community Services' Key Performance Measures represent the majority of all agency programs. The Department has approximately 64 programs/funding streams that work collectively to address issues of affordable homeownership and rental housing; energy and weatherization assistance; self-sufficiency (including homeless, food, and rental assistance programs), and capacity building. OHCS's ten KPMs provide a comprehensive evaluation in each of these areas.

## 2. THE OREGON CONTEXT

OHCS provides a continuum of services to low-income Oregonians from homeless assistance to homeownership. As part of its long term goals, it is the Department’s intent to serve low-income citizens (100% Area Median Income and below) with the services that are necessary to move them along the continuum of services and ultimately to self-sufficiency. There are several Oregon Benchmarks in which the Department’s KPMs are linked.

*OBM #55 – Homelessness: Number of Oregonians that are homeless on any given night (per 10,000).*

*OBM #57 – Hunger: As a percent of the U.S., percent of Oregon households with limited or uncertain access to enough food for all household members to live a healthy and active life: a. food insecurity with hunger; b. food insecurity.*

*OBM #73 – Homeownership: Percent of households that are owner occupied.*

*OBM #74 - Affordable Housing: Percent of Oregon households below median income spending 30% or more of their income on housing (including utilities) a. renters; b. owners.*

OHCS works with a variety of other state and local partners in developing solutions for low-income Oregonians that effectively move them to self-sufficiency.

## 3. PERFORMANCE SUMMARY

<b>KPM Progress Summary</b>	<b>Key Performance Measures (KPMs) with Page References</b>	<b># of KPMs</b>
KPMs MAKING PROGRESS at or trending toward target achievement	Reducing Homelessness, Affordable Rental Housing through Bonds, Increasing Energy Savings, Agency Customer Service, Food Insecurity	5
KPMs NOT MAKING PROGRESS not at or trending toward target achievement	Affordable Home Ownership, Affordable Home Ownership Education, Affordable Rental Housing through Grants, Increasing Housing for Special Needs Individuals	4
KPMs - PROGRESS UNCLEAR target not yet set	Construction Costs	1
Total Number of Key Performance Measures (KPMs)		10

## 4. CHALLENGES

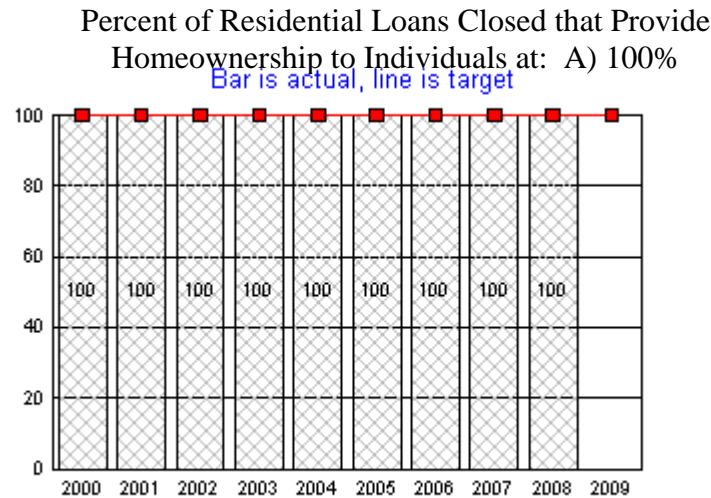
Many of the challenges OHCS faces are related to the housing market as well as resource availability. The financial and housing markets are in turmoil, and both foreclosures and the cost of construction are at all time highs. In trying to develop or create affordable housing for low-income Oregonians, it often requires increased resources to either get the project built or purchase the home. As long as these costs continue to rise while resources remain stable, OHCS’s ability to create affordable housing will obviously diminish.

## **5. RESOURCES AND EFFICIENCY**

Oregon Housing and Community Services' annual budget (based on its 2007-09 biennial budget) is approximately \$2.17 billion. The majority of this budget (approximately 84%) is related to the origination of mortgage loans and the subsequent payment of debt services. The Department's budget contains less than 1% of state General Fund. Approximately 10% of the Department's resources is from Federal Funds that support a variety of anti-poverty programs, Section 8 rental assistance, and funding to support the development of very-low-income housing. The Department also receives about 5% of Other Funds for energy and weatherization assistance, manufactured dwelling park landlord and tenant mediation, and rental assistance.

The Department uses its biennial customer service performance measure to evaluate its efficiency as well as effectiveness in providing service opportunities for low-income Oregonians. The remaining nine performance measures measure the Department's effectiveness in reaching program goals within its continuum of services.

<b>KPM #1a</b>	Affordable Home Ownership – Percent of residential loans closed that provide homeownership to individuals at A) 100%	2001
<b>Goal</b>	Homeownership: Increase homeownership opportunities for low-income Oregonians.	
<b>Oregon Context</b>	OBM #73 – Homeownership: Percent of households that are owner occupied.	
<b>Data Source</b>	OHCS Loan Information Processing System	
<b>Owner</b>	Housing Finance Section – Dona Lanterman (503) 986-2120	



Data is represented by percent

**1. OUR STRATEGY**

OHCS’s strategy is to provide homeownership opportunities to individuals that are at 100% of area median income and below with a heavy emphasis on those that are at 80% and below. The Department works with approximately 30 banks that assist in marketing the program and originating loans.



**2. ABOUT THE TARGETS**

The target is to always provide 100% of these loans to Oregonians that are at 100% of area median income or below. OHCS continues to focus on targeting 70% of its loan production to those that are at 80% area median income and below.

**3. HOW WE ARE DOING**

In 2008, the percent of loans provided for low-income Oregonians at 100% area median income and below was 100%. The trend in serving individuals at both 90% area median income and below and 80% area median income and below has been declining since 2004.

**4. HOW WE COMPARE**

In terms of production, OHCS is on track in comparison to other Housing Finance Agencies around the nation.

**5. FACTORS AFFECTING RESULTS**

Given the turmoil in the credit and housing markets, it is an increased challenge to finance homes that are affordable for low-income citizens. If interest rates increase in response to problems in the sub-prime mortgage industry, the trend of fewer loans for individuals at 90% AMI will continue.

**6. WHAT NEEDS TO BE DONE**

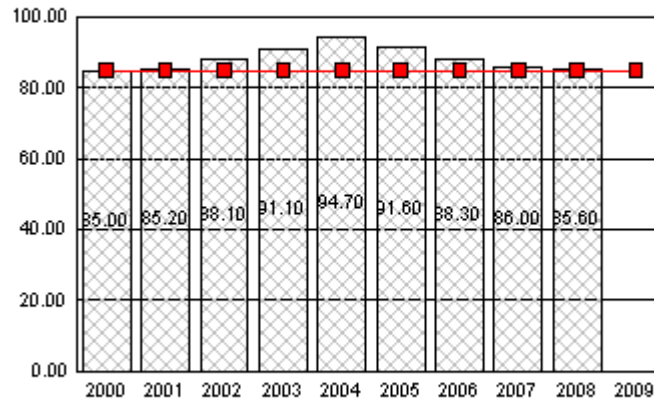
OHCS will need to identify resources that increase down payment assistance in order to make loans affordable to the lowest-income Oregonians. Without this subsidy, homeownership will continue to be out of reach for some low-income Oregonians.

**7. ABOUT THE DATA**

Data is provided for the fiscal year from the Department's Loan Information Processing System. This data is very reliable as it is reconciled with bank servicers on a monthly basis.

<b>KPM #1b</b>	Affordable Home Ownership – Percent of residential loans closed that provide homeownership to individuals at B) 90%	2001
<b>Goal</b>	Homeownership: Increase homeownership opportunities for low-income Oregonians.	
<b>Oregon Context</b>	OBM #73 – Homeownership: Percent of households that are owner occupied.	
<b>Data Source</b>	OHCS Loan Information Processing System	
<b>Owner</b>	Housing Finance Section – Dona Lanterman (503) 986-2120	

Percent of Residential Loans Closed that Provide Homeownership to Individuals at: B) 90% Applicable  
Bar is actual, line is target



Data is represented by percent

**1. OUR STRATEGY**

OHCS’s strategy is to provide homeownership opportunities to individuals that are at 100% of area median income and below with a heavy emphasis on those that are at 80% and below. The Department works with approximately 30 banks that assist in marketing the program and originating loans.

**2. ABOUT THE TARGETS**

The target is to always provide 100% of these loans to Oregonians that are at 100% of area median income or below. OHCS continues to focus on targeting 70% of its loan production to those that are at 80% area median income and below.

**3. HOW WE ARE DOING**

In 2008, the percent of loans provided for low-income Oregonians at 90% area median income and below was 85.6%, just above the goal of 85%. The trend in serving individuals at both 90% area median income and below and 80% area median income and below has been declining since 2004.

**4. HOW WE COMPARE**

In terms of production, OHCS is on track in comparison to other Housing Finance Agencies around the nation.

**5. FACTORS AFFECTING RESULTS**

Given the turmoil in the credit and housing markets, it is an increased challenge to finance homes that are affordable for low-income citizens. If interest rates increase in response to problems in the sub-prime mortgage industry, the trend of fewer loans for individuals at 90% AMI will continue.

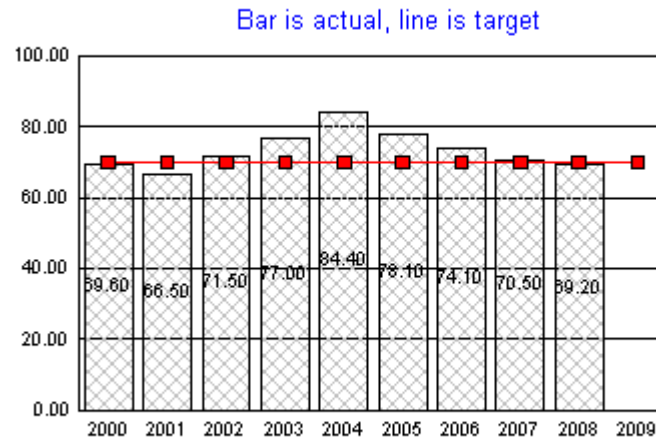
**6. WHAT NEEDS TO BE DONE**

OHCS will need to identify resources that increase down payment assistance in order to make loans affordable to the lowest-income Oregonians. Without this subsidy, homeownership will continue to be out of reach for some low-income Oregonians.

**7. ABOUT THE DATA**

Data is provided for the fiscal year from the Department's Loan Information Processing System. This data is very reliable as it is reconciled with bank servicers on a monthly basis.

<b>KPM #1c</b>	Affordable Home Ownership – Percent of residential loans closed that provide homeownership to individuals at C) 80%	2001
<b>Goal</b>	Homeownership: Increase homeownership opportunities for low-income Oregonians.	
<b>Oregon Context</b>	OBM #73 – Homeownership: Percent of households that are owner occupied.	
<b>Data Source</b>	OHCS Loan Information Processing System	
<b>Owner</b>	Housing Finance Section - Dona Lanterman (503) 986-2120	



Data is represented by number

**1. OUR STRATEGY**

OHCS’s strategy is to provide homeownership opportunities to individuals that are at 100% of area median income and below with a heavy emphasis on those that are at 80% and below. The Department works with approximately 30 banks that assist in marketing the program and originating loans.

**2. ABOUT THE TARGETS**

The target is to always provide 100% of these loans to Oregonians that are at 100% of area median income or below. OHCS continues to focus on targeting 70% of its loan production to those that are at 80% area median income and below.

**3. HOW WE ARE DOING**

In 2008, the percent of loans provided for low-income Oregonians at 80% area median income and below was 69.2%. This is the first time that this measure has missed the target of 70%; however, the trend in serving individuals at both 90% area median income and below and 80% area median income and below has been declining since 2004.

**4. HOW WE COMPARE**

In terms of production, OHCS is on track in comparison to other Housing Finance Agencies around the nation.

**5. FACTORS AFFECTING RESULTS**

Given the turmoil in the credit and housing markets, it is an increased challenge to finance homes that are affordable for low-income citizens. If interest rates increase in response to problems in the sub-prime mortgage industry, the trend of fewer loans for individuals at 90% AMI will continue.

**6. WHAT NEEDS TO BE DONE**

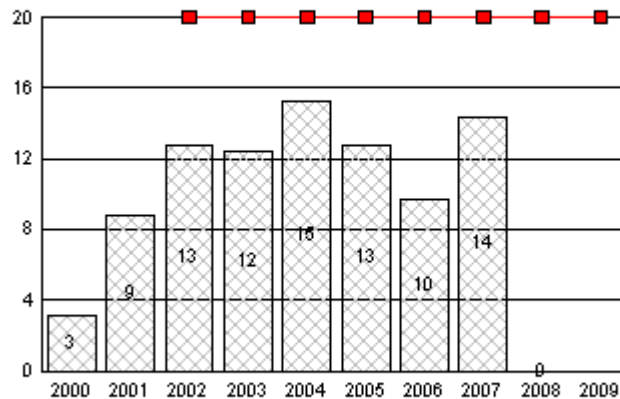
OHCS will need to identify resources that increase down payment assistance in order to make loans affordable to the lowest-income Oregonians.

**7. ABOUT THE DATA**

Data is provided for the fiscal year from the Department's Loan Information Processing System. This data is very reliable as it is reconciled with bank servicers on a monthly basis.

<b>KPM #2</b>	Affordable Home Ownership Education – Percent of approved mortgage loans through OHCS that are for recipient who have completed The ABC’s of Homebuying within the previous two years.	2001
<b>Goal</b>	Homeownership: Increase homeownership opportunities for low-income Oregonians.	
<b>Oregon Context</b>	OBM #73 – Homeownership: Percent of households that are owner occupied.	
<b>Data Source</b>	OHCS Loan Information Processing System	
<b>Owner</b>	Housing Finance Section – Dona Lanterman (503) 986-2120	

Percent of Mortgage Loans through OHCS that are for Recipients who have Completed the ABCs of Homebuying  
 Bar is actual, line is target



Data is represented by yes = 1, no = 0

**1. OUR STRATEGY**

OHCS’s strategy is to ensure that low-income Oregonians who receive a loan through the Department’s Residential Loan Program are prepared to be homeowners and have the best chance possible to be successful.

**2. ABOUT THE TARGETS**

The target is that 20% of the loans provided through the Department's Residential Loan Program go to borrowers who have participated in an approved homebuyer education program. The higher the percentage of loans, the better.

**3. HOW WE ARE DOING**

In 2008, OHCS did not collect data on this measure as we discontinued the practice of reimbursing sponsors for offering this training. This measure has never met the target of 20%.

**4. HOW WE COMPARE**

There is not a comparable measure for this KPM.

**5. FACTORS AFFECTING RESULTS**

N/A

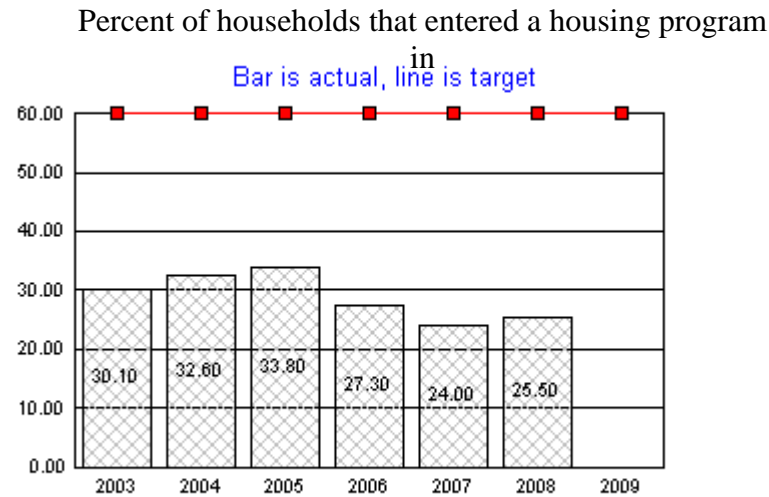
**6. WHAT NEEDS TO BE DONE**

N/A

**7. ABOUT THE DATA**

Data was provided for the fiscal year from the Department's Loan Information Processing System. This data was subject to some error since the applicants provided information about participating in these programs on a voluntary basis. We no longer receive this data.

<b>KPM #3</b>	Reducing Homelessness – Percent of households that entered a housing program in either a homeless or at-risk status that exited to a stable housing situation.	2001
<b>Goal</b>	Housing Insecurity And Homelessness: Reduce housing insecurity and homelessness in Oregon.	
<b>Oregon Context</b>	OBM #56 – Homelessness: Number of Oregonians that are homeless on any given night (per 10,000).	
<b>Data Source</b>	OHCS Community Services Block Grant Report and Annual Homeless Statistical Report	
<b>Owner</b>	Community Services Section – Lynn Adams (503) 986-6736	



Data is represented by percent

**1. OUR STRATEGY**

OHCS’s strategy is ensure that homeless households or those at-risk of becoming homeless that are participating in the Department’s homeless programs are successfully exiting the program in a stable and permanent housing situation.



**2. ABOUT THE TARGETS**

The target is currently to ensure that 60% of the individuals entering the OHCS homeless programs are exiting in stable housing. This is a very aggressive target.

**3. HOW WE ARE DOING**

In 2007, 25.5% of the households that entered a OHCS homeless program exited into a stable housing situation. This is an improvement over the long-term trend.

**4. HOW WE COMPARE**

This progress is consistent with those few other states that have started an intensive permanent housing strategy for the homeless.

**5. FACTORS AFFECTING RESULTS**

In order to effectively stabilize individuals that have been homeless, there needs to be a program that permanently houses this population and provides the appropriate intensive services. This type of housing is expensive and requires a continuing commitment on the part of the state to invest in this type of housing. The benefits that will be achieved through this type of housing will far exceed the cost.

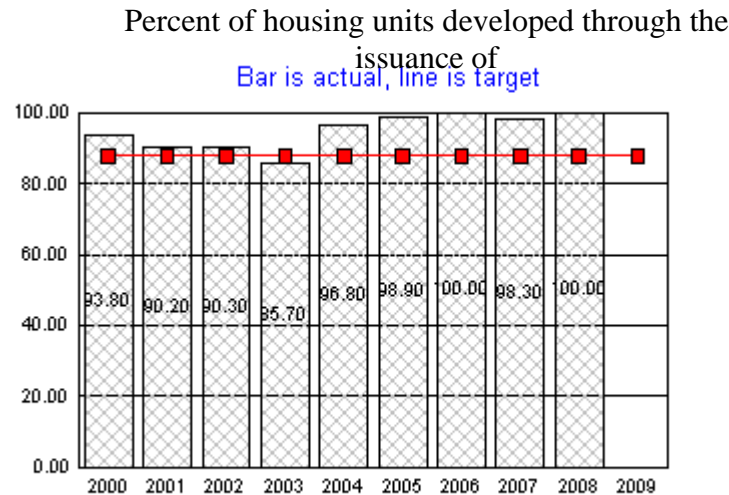
**6. WHAT NEEDS TO BE DONE**

In July 2008, the Ending Homelessness Advisory Council (EHAC), a statewide working group of experts and community representatives, completed work on the Governor's 10-year plan to end homelessness. EHAC will also collaborate with community leaders to help implement local plans.

**7. ABOUT THE DATA**

Data is provided through the annual community services block grant report and the annual homeless statistical report. The data compares the number of individuals treated with some form of emergency shelter or transitional housing opportunity, to the number of individuals who exited programs in permanent housing. The quality of this data requires careful reporting by community partners. Please note that this data is reported on a calendar year basis.

<b>KPM #4</b>	Affordable Rental Housing through Bonds – Percent of housing units developed through the issuance of tax-exempt bonds that provide affordable rental opportunities for individuals at 60% or below area median income.	2001
<b>Goal</b>	Housing Insecurity and Homelessness: Reduce housing insecurity and homelessness in Oregon.	
<b>Oregon Context</b>	OBM #74a - Affordable Housing: Percent of Oregon households below median income spending 30% or more of their income on housing (including utilities) a. renters.	
<b>Data Source</b>	OHCS Loan Information Processing System	
<b>Owner</b>	Housing Finance Section – Bob Gillespie (503) 986-2106	



Data is represented by percent

**1. OUR STRATEGY**

OHCS’s strategy is to provide affordable rental housing opportunities for individuals at 60% area median income and below. The Department works with a variety of affordable housing developers to create affordable housing projects across Oregon. These developers include housing authorities, community development corporations, non-profits organizations, and private housing developers.

**2. ABOUT THE TARGETS**

The target is to provide 88% of the units developed in the Department's bond programs for individuals at or below 60% area median income.

**3. HOW WE ARE DOING**

In 2008, the percent of units developed through the OHCS bond programs for low-income Oregonians at 60% area median income or below was 100%. This measure continues to be above the target.

**4. HOW WE COMPARE**

In terms of production, OHCS is on track in comparison to other Housing Finance Agencies around the nation.

**5. FACTORS AFFECTING RESULTS**

The trend is very typical to how the agency has always performed in this area. While the total number of multifamily units produced has declined due to the increasing cost of construction and land value, the Department has consistently created affordability for low-income Oregonians.

**6. WHAT NEEDS TO BE DONE**

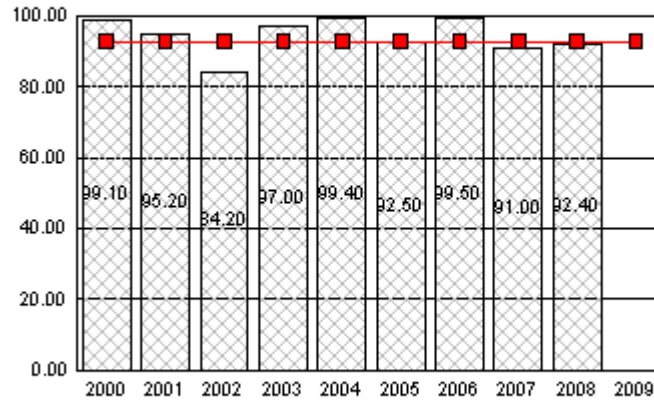
The biggest change that would impact this particular measure would be to reduce construction costs (see proposed KPM#10). OHCS will continue to work with its architects and partners to apply value engineering where possible in hopes of maintaining its existing level of affordability.

**7. ABOUT THE DATA**

Data is provided for the fiscal year from the Department's Loan Information Processing System. This data is very reliable as it is reconciled with bank servicers on a monthly basis.

<b>KPM #5a</b>	Affordable Rental Housing through Grants – Percent of housing units developed through the Department’s Consolidated Funding Cycle and other processes that provide affordable rental opportunities for individuals at A) 60% area median income and below.	2001
<b>Goal</b>	Housing Insecurity and Homelessness: Reduce housing insecurity and homelessness in Oregon.	
<b>Oregon Context</b>	OBM #74a - Affordable Housing: Percent of Oregon households below median income spending 30% or more of their income on housing (including utilities) a. renters.	
<b>Data Source</b>	OHCS Data Information System for Housing	
<b>Owner</b>	Housing Resources Section, Betty Markey, (503) 986-2116	

Percent of housing units developed through the Department's CFC and other processes that provide  
 Bar is actual, line is target



Data is represented by percent

**1. OUR STRATEGY**

OHCS's strategy is to provide homeownership opportunities to individuals that are between 0% and 60% of area median income. The Department works with a variety of affordable housing developers to create affordable housing projects across Oregon. These developers include housing authorities, community development corporations, non-profits organizations, and private housing developers.

**2. ABOUT THE TARGETS**

The target is to provide 93% of the units developed in the Department's grant and tax-credit programs for individuals at or below 60% area median income.

**3. HOW WE ARE DOING**

In 2008, OHCS did not meet its goals for this measure achieving 92.4%, just below the goal of 93%.

Historically, the Department has done a very good job in meeting its goals of housing affordability through the use of grants and tax credits. As the construction costs of housing continues to increase and the amount of housing development resources remains stable, it has become more and more difficult to reach the lowest-income Oregonians. Last year was first time since the inception of the performance measures that OHCS has not reached any of its targets. This trend is reflected in this year's data.

**4. HOW WE COMPARE**

In terms of production, OHCS is on track in comparison to other Housing Finance Agencies around the nation.

**5. FACTORS AFFECTING RESULTS**

The rising cost of construction has put increased pressure on the Department's limited resources to develop projects that can be financially feasible for the lowest-income Oregonians. In order to meet this need, OHCS will need to increase resources. In addition, with an increased focus on workforce housing, there will be more production for individuals at a higher level of income.

**6. WHAT NEEDS TO BE DONE**

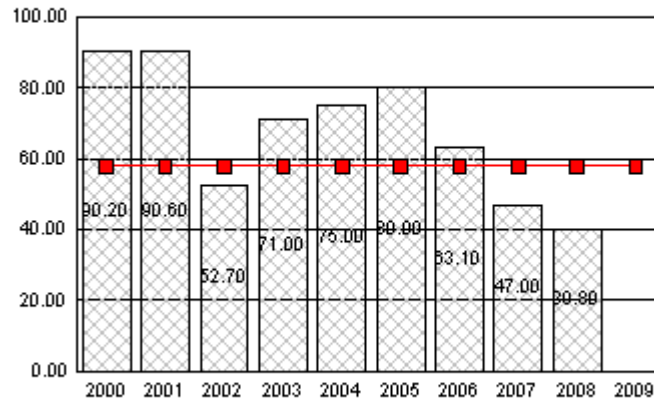
OHCS will need to identify additional resources to keep up with the increased cost of construction and/or identify other partners that are able to bring resources to the project for development.

**7. ABOUT THE DATA**

Data is provided on a fiscal year basis from the Department's Data Information System for Housing. This data is very reliable as it is reconciled with an additional data captured in Excel spreadsheets.

<b>KPM #5b</b>	Affordable Rental Housing through Grants – Percent of housing units developed through the Department’s Consolidated Funding Cycle and other processes that provide affordable rental opportunities for individuals at B) 50% area median income and below.	2001
<b>Goal</b>	Housing Insecurity and Homelessness: Reduce housing insecurity and homelessness in Oregon.	
<b>Oregon Context</b>	OBM #74a - Affordable Housing: Percent of Oregon households below median income spending 30% or more of their income on (including utilities) a. renters.	
<b>Data Source</b>	OHCS Data Information System for Housing	
<b>Owner</b>	Housing Resources Section, Betty Markey, (503) 986-2116	

Percent of housing units developed through the Department's CFC and other processes that provide  
*Bar is actual, line is target*



Data is represented by percent

**1. OUR STRATEGY**

OHCS's strategy is to provide homeownership opportunities to individuals that are between 0% and 60% of area median income. The Department works with a variety of affordable housing developers to create affordable housing projects across Oregon. These developers include housing authorities, community development corporations, non-profits organizations, and private housing developers.

**2. ABOUT THE TARGETS**

The target is to provide 58% of the units developed in the Department's grant and tax-credit programs for individuals at or below 50% area median income.

**3. HOW WE ARE DOING**

In 2008, OHCS did not meet its goals for this measure achieving 39.8%, below the goal of 58%.

Historically, the Department has done a very good job in meeting its goals of housing affordability through the use of grants and tax credits. As the construction costs of housing continues to increase and the amount of housing development resources remains stable, it has become more and more difficult to reach the lowest-income Oregonians. Last year was first time since the inception of the performance measures that OHCS has not reached any of its targets. This trend is reflected in this year's data. In 2008, OHCS did not meet its goals for this measure.

**4. HOW WE COMPARE**

In terms of production, OHCS is on track in comparison to other Housing Finance Agencies around the nation.

**5. FACTORS AFFECTING RESULTS**

The rising cost of construction has put increased pressure on the Department's limited resources to develop projects that can be financially feasible for the lowest-income Oregonians. In order to meet this need, OHCS will need to increase resources. In addition, with an increased focus on workforce housing, there will be more production for individuals at a higher level of income.

**6. WHAT NEEDS TO BE DONE**

OHCS will need to identify additional resources to keep up with the increased cost of construction and/or identify other partners that are able to bring resources to the project for development.

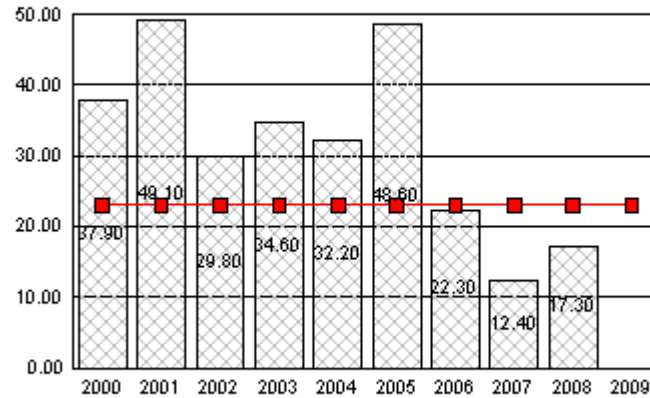


**7. ABOUT THE DATA**

Data is provided on a fiscal year basis from the Department's Data Information System for Housing. This data is very reliable as it is reconciled with additional data captured in Excel spreadsheets.

<b>KPM #5c</b>	Affordable Rental Housing through Grants – Percent of housing units developed through the Department’s Consolidated Funding Cycle and other processes that provide affordable rental opportunities for individuals at C) 40% area median income and below.	2001
<b>Goal</b>	Housing Insecurity and Homelessness: Reduce housing insecurity and homelessness in Oregon.	
<b>Oregon Context</b>	OBM #74a - Affordable Housing: Percent of Oregon households below median income spending 30% or more of their income on housing (including utilities) a. renters.	
<b>Data Source</b>	OHCS Data Information System for Housing	
<b>Owner</b>	Housing Resources Section, Betty Markey, (503) 986-2116	

Percent of housing units developed through the Department's CFC and other processes that provide  
 Bar is actual, line is target



Data is represented by percent

**1. OUR STRATEGY**

OHCS's strategy is to provide homeownership opportunities to individuals that are between 0% and 60% of area median income. The Department works with a variety of affordable housing developers to create affordable housing projects across Oregon. These developers include housing authorities, community development corporations, non-profits organizations, and private housing developers.

**2. ABOUT THE TARGETS**

The target is to provide 23% of the units developed in the Department's grant and tax-credit programs for individuals at or below 40% area median income.

**3. HOW WE ARE DOING**

In 2008, OHCS did not meet its goals for this measure achieving 17.3%, below the goal of 23%.

Historically, the Department has done a very good job in meeting its goals of housing affordability through the use of grants and tax credits. As the construction costs of housing continues to increase and the amount of housing development resources remains stable, it has become more and more difficult to reach the lowest-income Oregonians. Last year was the first time since the inception of the performance measures that OHCS has not reached any of its targets. This trend is reflected in this year's data. In 2008, OHCS did not meet its goals for this

**4. HOW WE COMPARE**

In terms of production, OHCS is on track in comparison to other Housing Finance Agencies around the nation.

**5. FACTORS AFFECTING RESULTS**

The rising cost of construction has put increased pressure on the Department's limited resources to develop projects that can be financially feasible for the lowest-income Oregonians. In order to meet this need, OHCS will need to increase resources. In addition, with an increased focus on workforce housing, there will be more production for individuals at a higher level of income.

**6. WHAT NEEDS TO BE DONE**

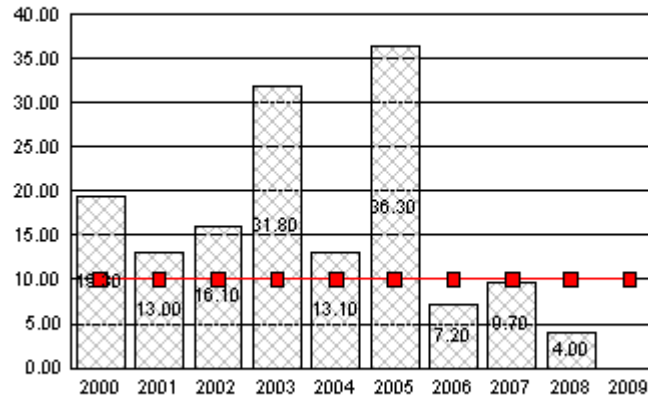
OHCS will need to identify additional resources to keep up with the increased cost of construction and/or identify other partners that are able to bring resources to the project for development.

**7. ABOUT THE DATA**

Data is provided on a fiscal year basis from the Department's Data Information System for Housing. This data is very reliable as it is reconciled with additional data captured in Excel spreadsheets.

<b>KPM #5d</b>	Affordable Rental Housing through Grants – Percent of housing units developed through the Department’s Consolidated Funding Cycle and other processes that provide affordable rental opportunities for individuals at D) 30% area median income and below.	2001
<b>Goal</b>	Housing Insecurity and Homelessness: Reduce housing insecurity and homelessness in Oregon.	
<b>Oregon Context</b>	OBM #74a - Affordable Housing: Percent of Oregon households below median income spending 30% or more of their income on housing (including utilities) a. renters.	
<b>Data Source</b>	OHCS Data Information System for Housing	
<b>Owner</b>	Housing Resources Section, Betty Markey, (503) 986-2116	

Percent of housing units developed through the Department's CFC and other processes that provide  
 Bar is actual, line is target



Data is represented by percent

**1. OUR STRATEGY**

OHCS's strategy is to provide homeownership opportunities to individuals that are between 0% and 60% of area median income. The Department works with a variety of affordable housing developers to create affordable housing projects across Oregon. These developers include housing authorities, community development corporations, non-profit organizations, and private housing developers.

**2. ABOUT THE TARGETS**

The target is to provide 10% of the units developed in the Department's grant and tax-credit programs for individuals at or below 30% area median income.

**3. HOW WE ARE DOING**

In 2008, OHCS did not meet its goals for this measure achieving 4.0%, below the goal of 10%.

Historically, the Department has done a very good job in meeting its goals of housing affordability through the use of grants and tax credits. As the construction costs of housing continues to increase and the amount of housing development resources remains stable, it has become more and more difficult to reach the lowest-income Oregonians. Last year was the first time since the inception of the performance measures that OHCS has not reached any of its targets. This trend is reflected in this year's data. In 2008, OHCS did not meet its goals for this

**4. HOW WE COMPARE**

In terms of production, OHCS is on track in comparison to other Housing Finance Agencies around the nation.

**5. FACTORS AFFECTING RESULTS**

The rising cost of construction has put increased pressure on the Department's limited resources to develop projects that can be financially feasible for the lowest-income Oregonians. In order to meet this need, OHCS will need to increase resources. In addition, with an increased focus on workforce housing, there will be more production for individuals at a higher level of income.

**6. WHAT NEEDS TO BE DONE**

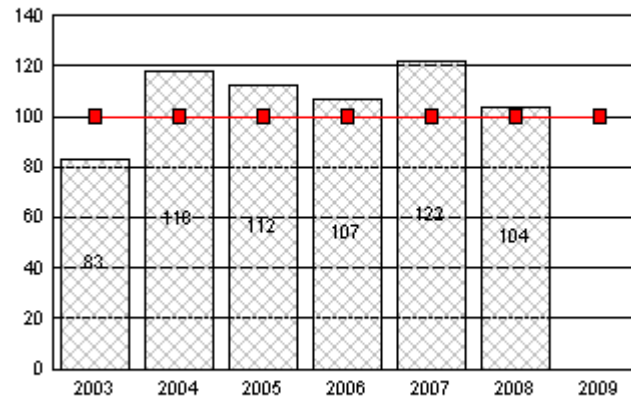
OHCS will need to identify additional resources to keep up with the increased cost of construction and/or identify other partners that are able to bring resources to the project for development.

**7. ABOUT THE DATA**

Data is provided on a fiscal year basis from the Department's Data Information System for Housing. This data is very reliable as it is reconciled with additional data captured in Excel spreadsheets.

<b>KPM #6</b>	Increasing Energy Savings – For all funds invested, the percent of energy savings generated from the Department’s Energy.	2003
<b>Goal</b>	Self-Sufficiency: Increase self-sufficiency among low-income Oregonians	
<b>Oregon Context</b>	No Specific State Benchmark – Agency Goal: To increase energy savings in Oregon	
<b>Data Source</b>	Quarterly Community Action Agency Reports and the Economics of Energy Calculator	
<b>Owner</b>	Community Resources Section, Dan Elliott (503) 986-2016	

Percent of energy savings generated from the Department's  
 Bar is actual, line is target



Data is represented by percent

**1. OUR STRATEGY**

OHCS’s strategy is to create energy savings in low-income Oregonians’ homes to enable them to become more self-sufficient, and have more funds to meet basic needs (food, medical etc).



**2. ABOUT THE TARGETS**

The target is to create \$1 in energy savings for every \$1 of state investment from the OHCS Energy Conservation Helping Oregonians program. This is represented as 100% of the amounts expended as an energy savings.

**3. HOW WE ARE DOING**

The Department continues to be successful in the results of this program, achieving a return of 104% in 2008. Other than the first year of implementation, the program has been able to create an excess of 100% savings to the amount of state investment.

**4. HOW WE COMPARE**

This data is not directly comparable to nationwide data, however, the target is very consistent with benchmark expectations in other states.

**5. FACTORS AFFECTING RESULTS**

Increased costs for weatherization material will continue to impact the results of this performance measurement and have brought down the percentage of savings achieved from those of last year.

**6. WHAT NEEDS TO BE DONE**

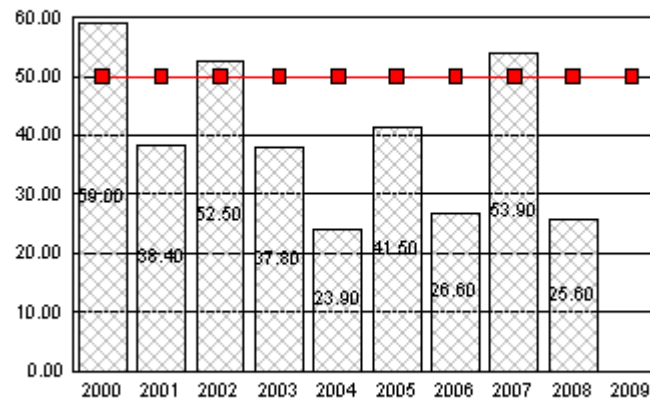
OHCS will continue providing technical assistance to its partners in an effort to improve efficiency and reduce the costs of weatherization. In addition, new techniques for weatherization will be researched and, where appropriate, implemented to create more energy savings.

**7. ABOUT THE DATA**

Data is provided on a quarterly basis from Community Action Agencies. The energy savings is reported in kilowatts, which is then converted to savings through the use of a nationally recognized Economics of Energy Calculator.

<b>KPM #7</b>	Increasing Housing for Special Needs Individuals – Percent of housing units developed that provide rental opportunities for the elderly and individuals with special needs.	2001
<b>Goal</b>	Self-Sufficiency: Increase self-sufficiency among low-income Oregonians	
<b>Oregon Context</b>	OBM #74a - Affordable Housing: Percent of Oregon households below median income spending 30% or more of their income on housing (including utilities) a. renters.	
<b>Data Source</b>	OHCS Loan Information Processing System and Data Information System for Housing	
<b>Owner</b>	Housing Resources Section, Betty Markey, (503) 986-2116 ; Housing Finance Section – Bob Gillespie (503) 986-2106	

Percent of housing units developed that provide rental opportunities for the elderly and people with special needs  
 Bar is actual, line is target



Data is represented by percent

**1. OUR STRATEGY**

OHCS’s strategy is to provide affordable housing opportunities for individuals with special needs. These include, but are not limited to: elderly, disabled, homeless, released offenders, farm workers, and alcohol and drug rehabilitation. This type of housing is typically designed for individuals with very low-income and requires the necessary services to meet the needs of the residents.

**2. ABOUT THE TARGETS**

The target is that 50% of the total multifamily units produced through the OHCS bond, grant and tax credits programs be for individuals with special needs.

**3. HOW WE ARE DOING**

The Department, in past years, has sometimes met the target specific to special needs housing. This target is relatively aggressive and the results vary from year to year based on the needs of individual communities and the quality of housing applications. In 2008, only 25.6% of the multifamily units developed were for individuals with special needs.

**4. HOW WE COMPARE**

There is no comparable data to this measure. Typically, housing finance agencies' targets for these types of populations vary from year to year based on needs and policy priorities.

**5. FACTORS AFFECTING RESULTS**

Special needs housing will often require intensive services to be provided in order to make the project successful. Many of the barriers that have been associated with creating special needs housing are due to the lack of funding available for services.

**6. WHAT NEEDS TO BE DONE**

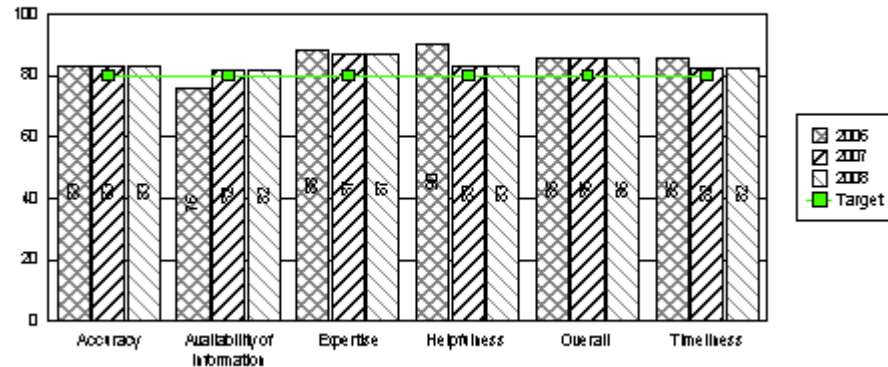
OHCS has adopted the Housing First model which is used across the nation for serving the homeless. Continued funding and tracking of this pilot program is needed.

**7. ABOUT THE DATA**

Data is provided on a fiscal year basis from the Department's Loan Information Processing System and Data Information System for Housing. This data is very reliable as it is reconciled with bank servicers and subsidiary systems on a monthly basis.

<b>KPM #8</b>	Agency Customer Service – Percent of customers rating their satisfaction with the agency’s customer service as “good” or “excellent:” timeliness, accuracy, helpfulness, expertise, availability of information, overall.	2006
<b>Goal</b>	Provide our customers with great customer service.	
<b>Oregon Context</b>	No specific benchmark. Established through the standards provided by the Oregon Progress Board	
<b>Data Source</b>	Biennial External Customer Service Survey	
<b>Owner</b>	Research and Analysis Section, Information Services Division, Lisa Joyce, (503) 986-0951	

Percent rating service as good or excellent



1. OUR STRATEGY

OHCS’s strategy is to provide good to excellent customer service in the areas of timeliness, accuracy, helpfulness, expertise, and availability of information leading to good to excellent customer service for our overall performance.

## 2. ABOUT THE TARGETS

The target is to ensure that 80% of the respondents to the Department's customer service survey rate the agency as either good or excellent in overall performance, timeliness, accuracy, helpfulness, expertise, and availability of information.

## 3. HOW WE ARE DOING

In 2007 we did our second customer service survey and the Department exceeded its target in all categories. This survey is done biennially, so the numbers for 2008 are the same as for 2007. A new survey will be done in 2009.

## 4. HOW WE COMPARE

In comparison to other agencies performance, OHCS appears to be at or above the average quality of customer service.

## 5. FACTORS AFFECTING RESULTS

It is still early to determine what factors may affect future results; however by concentrating agency attention on the availability of information through our web site, we did see a significant improvement in this category. We had significant "survey fatigue" among our customers and, in response, changed this measure from a yearly survey to a biennial survey.

## 6. WHAT NEEDS TO BE DONE

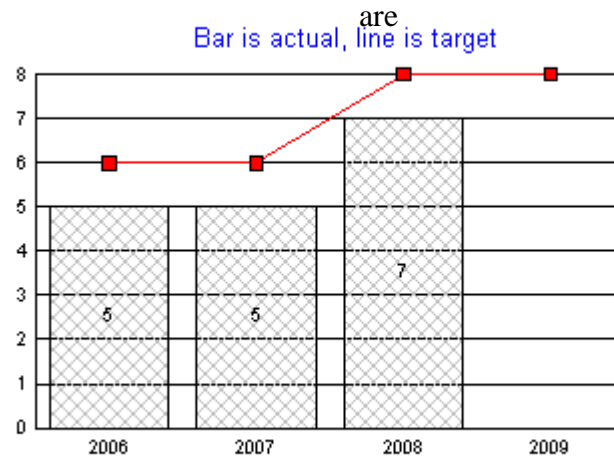
OHCS continues to work to improve its customers' access to Department information via the Internet and to offer very good customer service in all categories.

## 7. ABOUT THE DATA

This data is collected through an external survey administered on a biennial basis to a statistically valid sample of OHCS partners and key stakeholders.

<b>KPM #9</b>	Percent of pounds in donated food distributed through Oregon Food Bank that are processed or repackaged bulk food purchased through the General Fund Food Program.	2006
<b>Goal</b>	Self-Sufficiency: Increase self-sufficiency among low-income Oregonians	
<b>Oregon Context</b>	OBM #58 – Hunger: As a percent of the U.S., percent of Oregon households with limited or uncertain access to enough food for all household members to live a healthy and active life: a. food insecurity with hunger; b. food insecurity.	
<b>Data Source</b>	USDA annual report; Center on Hunger and Poverty, Brandeis University.	
<b>Owner</b>	Community Services Section, Mary Gentry; (503) 986-2117	

Percent of pounds of donated food through OFB that



Data is represented by percent

**1. OUR STRATEGY**

The Department’s strategy is to work with its partners to address the composition of emergency food boxes and provide families with greater access to healthy and nutritional food.

**2. ABOUT THE TARGETS**

Through the use of the Department's General Fund Food Program, the target is to ensure that 8% of the processed or repackaged food distributed through the Oregon Food Bank is linked specifically to the General Fund contribution. This target has been increased from 6% in 2007.

**3. HOW WE ARE DOING**

For 2008, the General Fund Food Program contributed 7% to the total food that was processed or repackaged through the Oregon Food Bank.

**4. HOW WE COMPARE**

This measurement is unique to Oregon. Not all states contribute state support to hunger relief efforts.

**5. FACTORS AFFECTING RESULTS**

As the General Fund contribution remains stable for the program, it will become an increased challenge to meet the agency target due to the cost of processing or repacking bulk food.

**6. WHAT NEEDS TO BE DONE**

OHCS will need to place an emphasis within its existing program on healthy nutritious food and maximizing its funding to meet the target established.

**7. ABOUT THE DATA**

Data is provided on a calendar year basis from the Oregon Food Bank that reports the total amount of processed or repackaged food. In addition, OHCS receives an annual report from the Oregon Food Bank that shows the total pounds of repackaged or processed food that is purchased with the General Fund Food Program. Both sources of data are very reliable due to the Oregon Food Bank's excellent system for tracking donated food.

HOUSING and COMMUNITY SERVICES, OREGON	III. USING PERFORMANCE DATA
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Agency	
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Provide leadership that enables Oregonians to gain housing, become self-sufficient, and achieve prosperity.

Contact: Bill Carpenter	Contact Phone: 503-986-2128
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Alternate: Rick Crager	Alternate Phone: 503-986-2076
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**The following questions indicate how performance measures and data are used for management and accountability purposes.**

<b>1. INCLUSIVITY</b>	<ul style="list-style-type: none"> <li>* <b>Staff :</b> Staff: The specific program staff linked to each KPM helped in the development of each measurement.</li> <li>* <b>Elected Officials:</b> Elected Officials: There was no elected official involvement in the development of these measures.</li> <li>* <b>Stakeholders:</b> Stakeholders: There were some stakeholders involved in the development of the Food Insecurity KPM..</li> <li>* <b>Citizens:</b> Citizens: There was no citizen involvement in the development of these measures.</li> </ul>
<b>2 MANAGING FOR RESULTS</b>	<p>With the measurements that have been established, the Department is able to make decisions about specific program focus. As necessary, management can make adjustments to how resources are used to impact those areas most in need. The Department includes its measurements related to housing development in applications for the Consolidated Funding Cycle. This communicates the Department's expectations to potential developers.</p>
<b>3 STAFF TRAINING</b>	<p>The Department has put specific managers and/or staff in charge of each of the OHCS Performance Measures. Managers provide information and education to staff on the results of the performance measures.</p>
<b>4 COMMUNICATING RESULTS</b>	<ul style="list-style-type: none"> <li>* <b>Staff :</b> Staff: Every employee is provided a copy of this annual report to see how their programs performed.</li> <li>* <b>Elected Officials:</b> Elected Officials: Communicated through Internet.</li> <li>* <b>Stakeholders:</b> Stakeholders: Communicated through Internet.</li> <li>* <b>Citizens:</b> Citizens: Communicated through Internet.</li> </ul>