

## MULTIPLE-UNIT LIMITED TAX EXEMPTION (MULTE) ANNUAL APPLICATION ANNOUNCEMENT

**Applications Due: Monday, October 1, 2012 at 3:00 PM (PDT)**

**OPPORTUNITY:** In keeping with the Portland Housing Bureau's (PHB) mission to "solve the unmet housing needs of the people of Portland," PHB announces the opening of the application period for the 2012 Multiple-Unit Limited Tax Exemption (MULTE) Program. This year, PHB is making available up to **\$1,000,000** of estimated and projected foregone revenue. Both rental and for-sale projects are invited to apply. Approved exemptions will go into effect July 1 of the assessment year in which construction is completed, but no earlier than July 1, 2014.

PHB's vision is that "all Portlanders can find affordable homes...and have equitable access to housing." Applicants should share this vision and craft their application narrative to include PHB's values as contained in PHB's [Strategic Plan](#):

**Equity** – we are committed to social justice in the delivery of housing to all residents of Portland's diverse communities;

**Stewardship** – we invest, leverage and prioritize spending in ways that provide the highest public value and have the greatest influence on critical housing needs;

**Transparency** – we build long-term trust by operating with integrity, inviting broad public involvement and following processes that are clear, open and without bias;

**Innovation** – we believe new thinking, partners and ideas will help us build an effective organization and resolve long-standing challenges.

**APPLICATION EVALUATION CRITERIA:** Applications meeting the minimum threshold requirements will be evaluated using the following seven evaluation criteria:

- Affordability
- Equity
- Accessibility
- Family Housing/Location
- Access to Amenities
- Gathering Spaces
- Special Needs Populations

**APPLICATION COORDINATOR:**

Dory Van Bockel  
Portland Housing Bureau  
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Portland, Oregon 97204  
(503) 823-4469

[dory.vanbockel@portlandoregon.gov](mailto:dory.vanbockel@portlandoregon.gov)  
<http://www.portlandonline.com/phb/MULTE>



## INFORMATION

**Application Announcement Title:** 2012 Multiple-Unit Limited Tax Exemption Application

**Application Coordinator:** Dory Van Bockel, Program Coordinator  
(503) 823-4469  
[dory.vanbockel@portlandoregon.gov](mailto:dory.vanbockel@portlandoregon.gov)

**Application Due Date/Time:** **Monday, October 1, 2012 at 3:00 PM (PDT)**

**Application Delivery Location:** Portland Housing Bureau  
421 SW 6<sup>th</sup> Ave, Suite 500  
Portland, OR 97204

**MULTE Webpage:** <http://www.portlandonline.com/PHB/MULTE>

*Direct all questions regarding this application to Dory Van Bockel*

## SCHEDULE

**Application Period Opens:** Wednesday, August 15, 2012

**Applications Due:** **Monday, October 1, 2012 at 3:00 PM (PDT)**

**Anticipated Date for PHB's Investment Committee Meeting:** December 4, 2012

**Anticipated Tentative Award Announcement:** December 7, 2012

**Application Fee Due:** December 17, 2012

**Anticipated Date for PHAC Hearing:** January 8, 2013

**Anticipated Date of City Council Approval:** January 23, 2013

*All applications must be received by the date and time due in order to be considered. PHB reserves the right to change any dates to serve the goals of the MULTE program.*

**ESTIMATED & PROJECTED FOREGONE REVENUE AVAILABILITY**

<b>Amount of Program Cap*</b>	<b>Projected Amount to be Utilized for Long Term Affordable Projects Receiving Extensions</b>	<b>Amount Available</b>
\$1,000,000	\$270,000	\$730,000

\* Projects located in either the Lents or Gateway Urban Renewal Areas are not subject to the annual estimated foregone revenue program cap.

**Applications for the MULTE Program must meet minimum threshold criteria in order to compete for the available program cap. The number of projects and units approved will depend on estimates of total foregone revenue. Projects recommended through the application process will be reviewed by PHB's Housing Investment Committee (PHIC) and receive a public hearing through the Portland Housing Advisory Commission (PHAC). Portland City Council will provide final approval for selected projects.**

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**Not all appendices are referenced within the body of the application. Please read all appendices carefully.**

## I. PROGRAM GOALS

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By providing the tax exemption to approved projects the City and other taxing jurisdictions are foregoing important tax revenue in order to ensure that affordable housing with amenities is included in new development in transit supportive and core urban areas. The MULTE Program can also be a tool to help maintain affordable housing already existing within the City. Through a two year review of the tax exemption programs, the City and other taxing jurisdictions have decided to limit the amount of exemptions available each year in order to better predict the program's impacts on budgets and to ensure that the benefit of the exemption is provided to the projects best meeting the area's housing goals.

The Legislative goals of the Multiple-Unit Limited Tax Exemption Program include:

- Stimulate the construction of transit supportive multiple-unit housing in the core areas of urban centers to improve the balance between the residential and commercial nature of those areas;
- Ensure full-time use of the areas as places where citizens of the community have an opportunity to live as well as work;
- Promote private investment in transit supportive multiple-unit housing in light rail station areas and transit oriented areas in order to maximize transit investment to the fullest extent possible; and
- Establish and design programs to attract new development of multiple-unit housing and commercial and retail property, in areas located within a light rail station area or transit oriented area.

The City of Portland and Multnomah County have established these additional core goals:

- Stimulate the construction of affordable housing and other public benefits where such housing or benefits may not otherwise be made available;
- Leverage market activities to advance housing and economic prosperity goals by aligning those activities with the goals of the [Portland Plan](#) and the PHB's [Strategic Plan](#); and
- Provide transparent and accountable stewardship of public investments.

## II. BENEFIT OF THE TAX EXEMPTION

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The Multiple-Unit Limited Tax Exemption Program provides a ten year property tax exemption on the residential portion of the structural improvements as long as program requirements are met. During the exemption period, property owners are still responsible for payment of the taxes on the assessed value of the land and any commercial portions of the project, except for those commercial improvements deemed a public benefit and approved for the exemption.

The value of the exemption cannot exceed 100 percent of the real market value. In the case of a structure converted in whole or in part from other uses to multiple-family, only the increase in value attributed to the conversion is eligible for the exemption.

The property is reassessed when the exemption is either terminated for noncompliance or expires after the ten years, and owners begin paying full property taxes.

**Commercial portions of a project** – For exemption of the commercial portion of a mixed use development, the developer must demonstrate through community engagement and/or a market analysis that the commercial space meets a community identified need for a good or service that is not currently available within walking distance, does not compete with a similar established business within walking distance, and advances [Portland Development Commission's \(PDC\) Neighborhood Economic Development Goals](#).

**Parking** – The exemption may include parking constructed as part of the multiple-unit housing construction, addition or conversion; any parking available shall not be required as payable rent.

**Extensions for low income housing** – Projects with an existing exemption may be eligible to apply for an extension. Extensions beyond the ten year exemption period will be granted only for projects subject to a low income housing assistance contract with an agency or subdivision of Oregon or the United States.

Applications for extensions must be submitted under the same application timeline as new applications prior to the exemption expiring. Extensions may be granted only for the portion of units which meet the affordability requirements through June 30 of the tax year during which the termination date of the low income housing assistance contract falls. Extension applicants should document in their application and through supporting documentation that the project continues to meet the program criteria which were originally approved, including the number of affordable units and public benefits provided. Projects that propose to make changes to the affordability mix must reapply through the competitive process. If there are no changes to the original criteria, then the application will not be part of the competitive scoring evaluation. Extension applications will count against the available amount (cap) of estimated foregone revenue in a given year. See Section V. Submittal Requirements/Application, for extension submission requirements.

### III. MINIMUM THRESHOLD REQUIREMENTS FOR ELIGIBILITY

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All applications must demonstrate the following criteria in order to be evaluated for approval:

- **Eligible areas** – Projects must be located within identified Designated Plan Areas/Metro 2040 Centers, within a quarter mile radius of Max Station Areas, or within a quarter mile from either Metro 2040 Main Streets with Transit Service or Metro 2040 Corridors with Frequent Transit Service within the City of Portland as illustrated on the map attached as Appendix G.
- **Timing of application** – Applications for tax exemption must be submitted and approved prior to application for the project's building permit.
- **Rental project financial need** – Analysis of the project pro forma must establish that the project would not otherwise be financially feasible without the benefit provided by the property tax exemption; the applicant must submit documentation that the anticipated rate of return for the project for the period of the exemption will not exceed 10 percent.
- **Affordability** – For rental projects, during the term of the exemption, a minimum of 20 percent of the number of units must be affordable to households earning 60 percent or less of the area median family income upon initial occupancy of the unit by that household. In high cost market areas a project may propose 20 percent of the number of units affordable to households earning 80 percent or less of the area median family income based on the market for similar units in the same geographic area supported by a market study.

Subsequent monitoring of the incomes of these households is not required until the affordable unit again becomes available for rent, at which time it must be rented to an income qualified household earning 60 percent (or 80 percent if approved as such) of the area median income for the remaining term of the property tax exemption, unless another unit has subsequently been rented at an equivalent affordable rate to a qualified household so that the project continues to comply with the affordability guidelines.

Measurement of household income shall be determined using the U.S. Department of Housing and Urban Development's, or its successor agency's, annual household income for the Portland Metropolitan Area for a family of one person (for a studio apartment), two persons (for a one-bedroom apartment), three persons (for a two-bedroom apartment), or four persons (for a three-bedroom apartment). Affordability shall be defined as a rental rate which does not exceed 30 percent of the monthly gross income including allowances for utilities (rent burden).

Affordable units to be distributed evenly amongst unit mix (bedroom sizes). Projects must maintain the same unit distribution of affordable units during the exemption period but individual units do not need to be designated.

- **For-sale project financial need/Affordability** – Units receiving tax exemption will be sold to buyers meeting the affordability requirements. Homebuyers (who will be both on title to the property and occupying the home) must earn no more than 100% median family income for a family of four –currently \$73,000 – adjusted upward for households larger than 4 persons.
- **For-sale project price cap** – For sale-units must sell for less than the sale price cap established annually by PHB – up to 120% of the annual median sale price for the City of Portland – currently \$274,800.

- **For-sale project occupancy** – For-sale units may not be rented at any time (both prior to initial sale and after homebuyer qualification); properties which are rented are subject to termination of the exemption. Homebuyers must occupy the property as their primary residence.
- **MWESB goals** – Applicants must provide a plan to meet PHB’s business equity goals for participation of Minority, Women, and Emerging Small Businesses (MWESB) in professional services and construction contracting and City workforce training and hiring goals.
- **Marketing Plan** – Applicants must submit a Marketing Plan that describes elements including but not limited to engaging community stakeholders, the use of gathering and commercial space in the project, and outreach to a target audience.
- **Neighborhood Contact** – Applicants are required to participate in the Neighborhood Contact process prior to applying for the building permit and tax exemption program. The Neighborhood Contact process provides a setting for the applicant and neighborhood residents to discuss a proposed project in an informal manner. By sharing information and concerns during the application process, all involved have the opportunity to identify ways to improve a proposed project, and to resolve conflicts before the tax exemption is approved.

The requirements for Neighborhood Contact are:

- The applicant must contact the neighborhood association for the area, by registered or certified mail, to request a meeting. A copy of this request must also be sent by registered or certified mail to the district neighborhood coalition.
- The neighborhood association should reply to the applicant within 14 days and hold a meeting within 45 days of the date of the initial contact. If the neighborhood association does not reply to the applicant's letter within 14 days, or hold a meeting within 45 days, the applicant may request a land use review or building permit without further delay. If the neighborhood requests the meeting within the time frame, the applicant must attend the meeting. The applicant may attend additional meetings on a voluntary basis. The neighborhood may schedule the meeting with its board, the general membership, or a committee.
- After the meeting and before pulling the building permit, the applicant must send a letter to the neighborhood association and district neighborhood coalition. The letter will explain changes, if any, the applicant is making to the proposed project.
- Copies of letters required by this subsection, and registered or certified mail receipts must be submitted with the tax exemption application.
- **Green building** – The project must be built to meet healthy and energy efficient environmental building standards. The applicant must certify in the application to build the project using one of the following standards:
  - Register and certify at the silver level for US Green Building Council’s Leadership and Energy in Environmental Design (LEED);
  - Register and certify at the silver level for Earth Advantage Multifamily;
  - Build to meet Oregon’s Reach Code for Commercial or Residential Buildings; or



- Comply and certify for Enterprise Green Communities' criteria for affordable housing.

Certification must be submitted to PHB with the first year's financial document submission. If the project is not built to meet one of the standards, the exemption will be terminated.

- **Eligible project types** – Projects must be proposed construction, additions to existing structures or conversion of existing non-residential property to housing.

Projects must have at least ten units with a minimum density of 35 units per net acre of site area (residential only); or at least ten units with a minimum density of 20 units per net acre of site area (mixed use with ground floor commercial space) and at least two times the amount of residential floor area to non-residential floor area; home ownership projects are exempt from this requirement.

A row-house or townhouse development containing for-sale or rental units is eligible as long as all other eligibility criteria are met.

The project must not be designed or used as transient accommodation, including but not limited to hotels and motels.

Existing multiple-unit housing projects which are currently or will become subject to a low income housing assistance contract with an agency or subdivision of Oregon or the United States are eligible to apply through the competitive process to receive an exemption in order to preserve or establish existing housing that is affordable to low income persons.

- **Pedestrian connection** – The project must provide a pedestrian connection and be physically or functionally related to and enhance the effectiveness of a light rail line or mass transportation system

Pedestrian connection means a continuous, unobstructed, reasonably direct route between two points that is intended and suitable for pedestrian use. Pedestrian connections include but are not limited to sidewalks, walkways, stairways and pedestrian bridges. On developed parcels, pedestrian connections are generally hard surfaced. In parks and natural areas, pedestrian connections may be soft-surfaced pathways. On undeveloped parcels and parcels intended for redevelopment, pedestrian connection may also include rights-of-way or easements for future pedestrian improvements.

- **Qualified applicant** – Applicant must own or have site control of the project site.

## IV. EVALUATION CRITERIA – PUBLIC BENEFITS

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In addition to meeting the required threshold criteria, projects must provide additional public benefits which will be evaluated for the most benefit.

The following criteria will receive priority scoring in the evaluation process:

- **Affordability** - Affordability in addition to threshold requirement, balanced with market rents (rental projects) or sale prices (for sale units) in the area;
- **Equity** - Applicant's demonstration in the MWESB and Affirmative Marketing Plans of how the project will help PHB achieve the vision contained in PHB's "[Guiding Principles on Equity and Social Justice](#)" through partnerships with community based organizations, the use of any commercial space, etc.; and
- **Accessibility** - Units accessible to persons with special needs, such as the mentally or physically disabled or other categories of persons as defined by the Federal Fair Housing Amendments Act of 1988 in addition to ADA and Fair Housing minimum requirements (i.e. all units "accessible ready", a portion of or all units fully "accessible", and incorporation of established accessible design features, such as [Universal Design](#), at both unit and site level.

Additional bonus scoring is possible for projects providing the following benefits:

- **Family Housing/Location** - Family sized units (2+ bedrooms) in areas lacking housing units with two or more bedrooms (defined as high deficiency areas in the [Deficiency Levels in Family-Sized Units map](#)) with appropriate family friendly amenities (family oriented recreational facilities for the children of project residents such as secure on-site play area, on-site garden area, etc.);
- **Access to Amenities** - Access to grocery stores, schools, day care, etc. (within ¼ mile);
- **Gathering Spaces** - Quality gathering space (exterior or interior) available to the community at large (on-going or by reservation) such as permanent dedications for public use including open space, community gardens, or pedestrian and bicycle connections to public trails and adjoining neighborhood areas; and
- **Special Needs Populations** - A portion of units reserved for and an established partnership with an agency to provide services to vulnerable populations (i.e. youth who have transitioned or are transitioning out of foster care, women fleeing domestic violence, veterans).

## V. SUBMITTAL REQUIREMENTS/APPLICATION

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Applicants must submit the following minimum application materials including the completed application form (Appendix A):

1. Cover page including:
  - Title: 2012 Multiple-Unit Limited Tax Exemption Application;
  - Name of and contact information for the applicant; and
  - Dated signature of applicant's executive director or chief officer.
  
2. Application form provided by PHB (Appendix A) with applicant's signature verifying oath or affirmation including:
  - Number, size, and type of dwelling units;
  - Dimensions of the multiple-unit structure(s), parcel size, lot coverage of building, and amount of open space;
  - Number of residential and commercial off-street parking spaces;
  - Proposed amount of floor area dedicated to residential, residential common, and nonresidential uses; and
  - Description of site control.
  
3. Project Overview Narrative describing:
  - Type of project (preservation, rehabilitation, conversion, and/or new construction; rental or for-sale);
  - Number and type of units and key design elements;
  - Marketing Plan, including a discussion of intended target population and income mix, indication of barriers the population faces, and how development team will provide outreach and support services.
  - Project location, neighborhood characteristics, appropriateness for target population, and any resident services;
  - How the project is consistent with PHB's values as contained in the [Strategic Plan](#) and the Program Goals of the MULTE Program;
  - How the project will meet PHB's Green Building requirement;
  - Public benefits description (including any extension of public benefits from the project beyond the period of the exemption);
  - Public and private access to amenities;
  - Parking and circulation plan;
  - A plan to meet PHB's business equity goals for participation of Minority, Women, and Emerging Small Businesses (MWESB) in professional services and construction contracting and City workforce training and hiring goals;
  - A description of the project's pedestrian connection to a mass transportation system; and
  - Any mutual identity of interest between the applicant and the construction contractor.

4. Project details:

- Conceptual site plan and supporting maps (drawn to a minimum scale of one inch equal to 16 feet, or a scale suitable for reproduction on 8-1/2" by 11" paper, showing the development plan of the entire project including streets, driveways, sidewalks, pedestrian ways, off street parking, loading areas, location, design, and dimension of structures, use of land and structure(s), major landscaping); and
- Project schedule - Fill out, to the greatest extent possible the "Proposed Project Schedule" contained in Appendix C.

5. Financial Information (for rental projects only) – spreadsheets to be submitted electronically/"live" (not PDF):

- Pro forma development budget (detailed project costs);
- Pro forma Sources and Uses;
- 15 year pro forma operating cash flow (income and expense analysis) without the exemption – demonstrate the 10 year average cash on cash return;
- 15 year pro forma operating cash flow (income and expense analysis) with the exemption – demonstrate the 10 year average cash on cash return;
- 15 year pro forma operating cash flow (income and expense analysis) showing the necessary increase in unit rents to achieve the same return as with the exemption – demonstrate the average cash on cash return;
- Rent structure (or expected purchase price) by unit type (affordable units to be net of utility allowance);
- Description of how real estate taxes without the exemption were determined;
- All components of developer equity including invested cash; and
- Copy of the market study provided to the senior lender for the project; and
- Economic feasibility, market analysis, or evidence of cost comparisons when appropriate.

6. Legal:

- Description of site control and supporting materials: property tax printout for all parcels, showing tax account numbers and legal descriptions (include copy of deed to document ownership or full legal description if necessary);
- Legal articles of entity who will receive the exemption (Identifying signature block);
- Such other information required by state or local law or otherwise which is reasonably necessary; and
- MULTE Application provided by PHB with applicant's signature verifying oath or affirmation and dated (Appendix A).

7. Neighborhood Contact:

- Copies of letters sent to the area neighborhood association and district neighborhood coalition along with copies of the certified or registered mail receipts.

For **extension** applications, applicants must include the following information in the completed application and supporting documentation:

1. Cover page including:

- Title: 2012 Multiple-Unit Limited Tax Exemption Application;
- Name of and contact information for the applicant; and
- Dated signature of applicant's executive director or chief officer.

2. Application form provided by PHB (Appendix A) with applicant's signature verifying oath or affirmation including:

- Number, size, and type of dwelling units;
- Dimensions of the multiple-unit structure(s), parcel size, lot coverage of building, and amount of open space;
- Number of residential and commercial off-street parking spaces;
- Proposed amount of floor area dedicated to residential, residential common, and nonresidential uses; and
- Description of site control.

3. Project description/narrative including:

- Number and type of units and key design elements;
- Target population and income mix;
- Project location, neighborhood characteristics, appropriateness for target population, and any resident services;
- Public and private access to amenities;
- Parking and circulation plan;
- Public benefits description (including any extension of public benefits from the project beyond the period of the exemption).

4. Financial Information – spreadsheet(s) to be submitted electronically/"live" (not PDF):

- Actual income and operating expense per year from the beginning of the last tax exemption.
- Provide detailed explanation of how the equity figure used is calculated.
- 15 year pro forma operating cash flow (income and expense analysis) **without** the exemption – demonstrate the annual and cumulative 10 year average cash on cash return;

- 15 year pro forma operating cash flow (income and expense analysis) **with** the exemption – demonstrate the annual and cumulative 10 year average cash on cash return;
- 15 year pro forma operating cash flow (income and expense analysis) showing the necessary increase in unit rents to achieve the same return as **with** the exemption – demonstrate the average cash on cash return;
- Rent structure by unit type (affordable units to be net of utility allowance). If the rent structure has varying rents within unit types (e.g. multiple rent levels) for 1 bedroom, include a roll up of total count by unit type.

5. Legal:

- Property tax printout for all parcels, showing tax account numbers and legal descriptions (include copy of deed to document ownership or full legal description if necessary);
- Legal articles of entity who will receive the exemption – may or may not be current owner if a Section 42 project for example – (Identifying signature block); and
- Such other information required by state or local law or otherwise which is reasonably necessary.

Extension applicants should document in their application and through supporting documentation that the project continues to meet the program criteria which were originally approved, including the number of affordable units and public benefits provided.

**Project application materials (1-3) shall not exceed 10 pages. All pages in the application must be numbered.**

Signed and dated applications must be submitted by **3:00 p.m. Monday, October 1, 2012 to be considered for approval.**

**Submit five (5) hard copies of completed application and documentation, with copies of all documents on CD-Rom (NO FAXES PLEASE) to:**

**Dory Van Bockel, Program Coordinator  
Portland Housing Bureau  
421 SW 6<sup>th</sup> Ave, Suite 500  
Portland, OR 97204  
Phone: (503) 823-4469**

## VI. SELECTION PROCESS AND SCORING

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Upon receipt, all applications will be reviewed initially by PHB staff to determine if the program minimum threshold requirements are met and for rental projects, if there is a financial need for the exemption. Projects meeting the minimum requirements will be weighed for the largest benefits to the city. Projects must at least reach a score of 50 to be competitive.

The following criteria will be evaluated and scored:

- **Affordability:** (maximum score of 50)

Affordability in addition to threshold requirement, balanced with market rents in the area;

- **Equity:** (maximum score of 30)

Applicant's demonstration in the MWESB and Affirmative Marketing Plans of how the project will help PHB achieve the vision contained in PHB's "Guiding Principles on Equity and Social Justice" through partnerships with community based organizations, the use of any commercial space, etc.;

- **Accessibility:** (maximum score of 20)

Units accessible to persons with special needs, such as the mentally or physically disabled or other categories of persons as defined by the Federal Fair Housing Amendments Act of 1988 in addition to ADA and Fair Housing minimum requirements (i.e. all units "accessible ready", a portion of or all units fully "accessible" and set aside by covenant during the term of the exemption, and incorporation of Universal Design features at both unit and site level; and

- **Bonus Scoring:** (possible additional score of 10 each; 40 total)

- **Family Housing/Location:** Family sized units (2+ bedrooms) in areas lacking housing units with two or more bedrooms (as defined in a map attached as Exhibit 2) with appropriate family friendly amenities (family oriented recreational facilities for the children of project residents such as secure on-site play area, on-site garden area, etc.);
- **Access to Amenities:** Access to grocery stores, schools, day care, etc. (within ¼ mile);
- **Gathering Spaces:** Quality gathering space (exterior or interior) available to the community at large (on-going or by reservation) such as permanent dedications for public use including open space, community gardens, or pedestrian and bicycle connections to public trails and adjoining neighborhood areas; and
- **Special Needs Populations:** A portion of units reserved for and an established partnership with an agency to provide services to "at-risk" or "special needs" populations (i.e. youth transitioning out of foster care or homelessness, women fleeing domestic violence, veterans).

After projects are reviewed and scored, the top projects will move forward through the approval process:

- **PHIC Review** – The PHB Housing Investment Committee will confirm the projects selected based on the scoring of the public benefits.

- **Application fee** – Applicants must pay PHB an application fee (to be established annually, including the fee to be paid to Multnomah County) for each selected application.
- **Tentative award announcement** – PHB will announce the projects which have been selected through the competitive process.
- **Public hearing before PHAC** – PHB will present the selected applications to the Portland Housing Advisory Committee at a public hearing, for which public notice will be given and public testimony will be heard.
- **URA approval** – For properties located in Urban Renewal Areas, PHB will contact Portland Development Commission (PDC) for approval prior to approval of the application.
- **Final approval** – Exemptions will receive final approval by PHB through the filing of an ordinance with City Council within 180 days of application. PHB will send a copy of the approved resolution to the applicant.
- **County activation** – PHB will send a copy of the approved ordinance and list of approved properties along with the corresponding fee to Multnomah County no later than April 1 each year.



## VII. GENERAL CONDITIONS

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PHB by posting this application, specifically reserves the right in its sole discretion to determine which applications best serve the public good, and to:

- A. Revise the application process including extending the deadline.
  - B. Waive informalities and irregularities in the applications received.
  - C. Disqualify without recourse or appeal any or all applications.
  - D. Determine the timing, arrangement and method of any presentation throughout the process.
  - E. Verify and investigate any of the information provided in the application.
1. Every effort has been made to provide current and correct information; however, unless citing a specific PHB approved resolution or plan, PHB makes no representation or warranty with respect thereto.
  2. All applications received shall become the property of PHB and considered an official public record subject to inspection by the public in accordance with ORS 192.502 and PHB's public records policy after the completion of the application process; and may be used for any purposes relevant to the decisions and actions undertaken by PHB.
  3. Restrictions on communication. Every effort has been made to include herein all the information necessary to prepare and submit a complete and competitive application. However, in the event additional information is desired, please adhere to the following:

If you have a question about any of the information or requirements contained in this application, direct your question to:

Dory Van Bockel, Program Coordinator  
Portland Housing Bureau  
421 SW Sixth Avenue, Suite 500  
Portland, OR 97204  
(503) 823-4469  
[dory.vanbockel@portlandoregon.gov](mailto:dory.vanbockel@portlandoregon.gov)

All substantive questions and answers as well as formal Addenda will be posted to the PHB website page: <http://www.portlandonline.com/PHB/MULTE>

4. During the course of this application period, applicants are cautioned not to make any direct or indirect (through others) contact with PHB staff members not identified in this application as a contact for specific information, except upon prior approval of the MULTE Program Coordinator.
5. PHB will not hold "one-on-one" meetings with any applicants during the evaluation process except as part of a scheduled interview or presentation process involving all or a "short list" of applicants. PHB may, however, ask individual applicants clarifying questions or obtain additional information about some specific point of an application.
6. Failure to abide by these restrictions is grounds for disqualification. This application announcement does not commit PHB to enter into an agreement.
7. PHB accepts no responsibility or obligation to pay any costs incurred by any potential or eventual applicants in the preparation or submission of an application or in complying with any subsequent request by PHB for information or participation throughout the evaluation process.

8. Applicants are prohibited from employing or retaining a former PHB employee to assist in the preparation of an application if the former PHB employee has been separated from PHB for less than one year and was associated with the property or related project while employed by PHB.
9. Approved applicants are further prohibited from employing or retaining a former PHB employee who has been separated from PHB for less than one year and was associated with the property or related project while employed by PHB:
  - A. To work on or receive any financial gain related to the project; or
  - B. To work in a capacity responsible for influencing, or trying to influence the actions of PHB other than through public testimony.
10. Denials: An applicant may not protest project selection. PHB will send a denial notice to all applicants who are not selected with the reason for the denial.
11. Selected applicants will be required to pay an application fee to PHB including the amount due to Multnomah County.
12. Approved projects will be required to:
  - A. (Rental projects) execute an Extended Use Agreement (EUA) and annually submit compliance reporting as described in Appendix C and as specified in agreement.
  - B. (For-sale projects) sell the individual units at a sale price below the established limit to an income qualified buyer who will occupy the unit as described in Appendix C.
  - C. **Existing PHB/PDC funded projects**- Any applicant with previously funded PHB/PDC projects in their portfolio must be current on reporting requirements and required loan payments.
  - D. **Support letters** from all partner service providers must be submitted in order for services to be considered in scoring.



Portland  
Housing  
Bureau

## EXHIBIT A

# APPLICATION

### PHB PROGRAM OR FUNDING DESCRIPTION

- HOME \$ \_\_\_\_\_
- CDBG \$ \_\_\_\_\_
- HOPWA \$ \_\_\_\_\_
- TIF \$ \_\_\_\_\_

- 108 Loan\* \$ \_\_\_\_\_  
(\* Terms: 20 year, fully amortizing loan with variable/fixed interest rate)
- Other Funding \$ \_\_\_\_\_
- Loan Modification/Restructure \$ \_\_\_\_\_
- Multiple Unit Limited Tax Exemption (MULTE)

Identify any other PHB programs or funding the project will apply for:

- SDC Exemptions  Lead Hazard Control Grant  Other (please specify) \_\_\_\_\_

### ORGANIZATIONAL INFORMATION

#### Applicant/Sponsor

Entity Name:		SSN/Tax ID:	
Address:		City/State:	Zip:
Contact Person:		Phone:	Fax:
Email:		Additional Contact Information (if applicable):	

#### Sponsor Type

- (please check one)
- For Profit
- Not-for-Profit
- Not-for-Profit Community Based Development Organization (CBDO)
- Not-for-Profit Community Housing Development Organization (CHDO)
- Home Forward
- Other specify \_\_\_\_\_

#### Entity Type

- (please check one)
- Partnership
- Limited Partnership
- Corporation
- Limited Liability Corp. (LLC)
- Community Development Corp. (CDC)
- S-Corporation
- Individual
- Other (specify) \_\_\_\_\_

#### Property Owner (if other than Applicant/Sponsor)

Entity Name:		Signatory Name & Title:	
Address:		City/State:	Zip:
Contact Person:		Phone:	Fax:
Email:		Additional Contact Information (if applicable):	

#### Site Control

Does the applicant have site control of the property? <input type="checkbox"/> Yes <input type="checkbox"/> No	Site Control Expiration Date (if applicable): _____
If yes, type of site control instrument (check one and submit documentation): <input type="checkbox"/> Deed <input type="checkbox"/> Lease <input type="checkbox"/> Option to Purchase <input type="checkbox"/> PSA <input type="checkbox"/> Other (specify) _____	If no, identify critical path to completing the site acquisition: _____ _____

<b>Developer</b>			
Name:		Contact Person:	
Address:		City/State:	Zip:
Email:		Phone:	Fax:
<b>On-Site Manager</b>			
Name:		Contact Person:	
Address:		City/State:	Zip:
Email:		Phone:	Fax:
<b>PROJECT INFORMATION</b>			
Project Name:		Primary Property Tax ID:	Additional Property Tax ID(s):
Address:		City/State:	Zip:
County:	Urban Renewal District (if applicable):	Census Tract:	Zoning:
<b>Proposed/Existing Project Description</b>			
Development Type (check all that apply): <input type="checkbox"/> New Construction <input type="checkbox"/> Rehabilitation <input type="checkbox"/> Mixed Use? <input type="checkbox"/> Demolition <input type="checkbox"/> Acquisition <input type="checkbox"/> Other (specify) _____ <input type="checkbox"/> Residential Rental <input type="checkbox"/> Residential For-Sale _____		Projected Project Financing Close Date:	Year Built (if existing):
		Does the structure have historical significance? (If existing): <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Dimensions</b>			
Parcel Size (Sq. Feet):	Structure Footprint (Sq. Feet):	Number of Stories:	
Building Size (Sq. Feet):	Open Space/Common Area (Sq. Feet):	Proposed Lot Coverage %:	
Residential Area (Sq. Feet):	Non-Residential/Commercial Area (Sq. Feet):	Proposed Residential Density (unit per acre):	
<b>Unit &amp; Parking Count</b>			
Number of Residential Units:	Number of Units with Restricted Affordability (rental):	Off Street Parking Spaces for Commercial Use:	
Number of Units Currently Occupied:	MFI% of Affordable Units (rental):	Off Street Parking Spaces Total:	
Number of Commercial Units:	Off Street Parking Spaces for Residential Use:	Structured Parking? <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Relocation</b>			
What is the site's current use and occupancy status of any existing structures, including the number of any residential units?			
If housing is to be demolished, what is the justification for eliminating sound or repairable housing on the site?			
Do you currently anticipate or is there a potential for relocation of tenants (both residential and business), either permanent or temporary? <input type="checkbox"/> Yes <input type="checkbox"/> No			
If yes, provide name of relocation manager _____ Contact Number: _____			
Please complete any additional forms required for the funding/program type for which you are applying.			

**Please see program guidelines for a complete list of the necessary supporting documentation to provide with this application. PHB reserves the right to request additional information that may be necessary for a complete application. Documentation includes but is not necessarily limited to the following:**

- |   |   |
|---|---|
| <input type="checkbox"/> A detailed development budget including a schedule of sources and uses for the project | <input type="checkbox"/> Site control documentation   |
| <input type="checkbox"/> Operating pro forma with detailed assumptions on each line item                        | <input type="checkbox"/> Acquisition/Relocation Questionnaire (if an occupied acquisition) *                      |
| <input type="checkbox"/> Construction Cash Flow   | <input type="checkbox"/> Environmental Phase I Report, Soils Report, Lead and/or Asbestos Report (if available) * |
| <input type="checkbox"/> Development team summary and qualifications *  | <input type="checkbox"/> Narrative Notes  |

\*Not applicable for MULTE application submission

**Oath and Certification**

I certify that all of the statements made in this application (and all other supporting documentation furnished in connection with this application) are true, complete and correct to the best of my knowledge and belief and are made in good faith. I understand that knowingly providing false information in connection with this application is a violation of state law and may result in criminal prosecution.

I understand Portland Housing Bureau (PHB) will retain this application whether or not it is approved, and completing the application is not a guarantee of approval or funding. I understand that any or all information contained in this application (and all other supporting documentation furnished in connection with this application) may be subject to verification or investigation by the PHB. In submitting this application, I authorize the verification and investigation of all matters which the PHB deems relevant to my application for financial assistance, including without limitation, all statements contained in this application, property inspections, credit and employment history, and construction experience. For these purposes, (a) I consent to the release of such information by credit agencies, banks, employers and other relevant individuals and agencies to any duly authorized agent of PHB; (b) I release from all liability such individuals and agencies supplying such information; and (c) I release the PHB from all liability for making such investigations and inquiries.

This application information is confidential and submitted voluntarily to the City of Portland acting by and through the PHB. I understand that non-exempt information contained in this application is subject to disclosure under the Oregon Public Records Law, ORS 192.420, in the sole discretion of PHB.

I certify that any tenant required to vacate within six (6) months prior to the date of loan application was evicted for documentable cause. Should any tenant (s) be displaced by the implementation of the project whether by rehabilitation, demolition or because of an increase in rents, I will be responsible for the cost incurred in their relocation.

I hereby certify that I understand the loan source may be federal funds and thereby, if required, I will maintain compliance with the pertinent federal regulations stipulated for the use of these funds.

The Federal Equal Credit Opportunity Act prohibits creditors from discriminating against credit applicants on the basis of race, color, religion, national origin, gender, marital status, age (provided the applicant has the capacity to enter into a binding contract); because all or part of the applicant's income derives from any public assistance program; or because the applicant has in good faith exercised any right under the Consumer Credit Protection Act. The federal agency that administers compliance with this law concerning this creditor is the Region X Office of the Federal Trade Commission, or Federal Trade Commission, Equal Credit Opportunity, Washington D.C. 20580."

Signed:	Title:	Date:
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Signed:	Title:	Date:
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Return original to:  
**Portland Housing Bureau**  
**421 SW 6<sup>th</sup> Avenue, Suite 500**  
**Portland, OR 97204**

For more information:  
**www.portlandonline.com/phb**  
**503-823-2375 phone**

## APPENDIX B

### Proposed Project Schedule

Project Name:

Schedule Date:

Activity	Proposed Date (month/year)*	Revised Date (month/year)*	Completed Date (month/year)*
<b>Site</b>			
Option/Contract executed			
Site Acquisition			
Zoning Approval			
Site Analysis			
Building Permits & Fees			
Off-Site Improvements			
<b>Pre-Development</b>			
Plans Completed			
Final Bids			
Contractor Selected			
<b>Financing</b>			
<b>Construction Loan:</b>			
Proposal			
Firm Commitment			
Closing/Funding of Loan			
<b>Permanent Loan:</b>			
Proposal			
Firm Commitment			
Closing/Funding of Loan			
<b>Development</b>			
Syndication/Partnership Agreement (LIHTC)			
Construction Begins			
Construction Completed			
Certificate of Occupancy			
<b>Marketing</b>			
Lease Up Begins			
Lease Up Completed			
Absorption (units per month)			

UNIT MIX			RENTS CALCULATION			AFFORDABILITY	
Unit Type- # of Bdrms	# of Units	Unit Sq. Footage	Gross Rent	Tenant pd. Mo. Utilities per unit	Contract Net Rent Per Unit	Affordability % of Median Family Income	Term of Affordability
<b>TOTALS</b>							

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## APPENDIX C

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### PROJECT COMPLIANCE REQUIREMENTS

#### Compliance Requirements:

- Eligible multiple-unit housing shall be constructed, converted, or preserved after the date of adoption of this program, and completed on or before January 1, 2022.
- Project owners must submit certification including any necessary supporting documentation of the public benefits and other project requirements identified in the approved application to PHB with the annual financial documentation submitted.

#### Rental projects

- **Extended Use Agreement** – The owner of a rental project approved for exemption will be required to sign an extended use agreement (EUA) to be recorded on the title to the property.
- **Annual reporting and review** – During the exemption period, the owner must submit project financial information annually to PHB within 45 days from the end of the project's fiscal year. The financial information shall include, but is not limited to the following:
  - Full project-based audited financial statements
  - Internal Revenue Services tax information (tax returns)
  - Ten year operating cash flow statement, showing actual cash flow for all prior years and the current year and shall include a to-date calculation of the rate of return for the project
  - Electronic Operating Statement (EOS) or similar form
  - Electronic Tenant Survey (ETS) (to validate subsequent rental and household income compliance, when unit becomes available for rent after initial occupancy)
    - Every fifth year, the tenant income qualification submitted shall be certified by a third party.
  - Any other documentation deemed necessary by PHB to calculate or evaluate the rate of return for the project

PHB will prepare an annual analysis of the project's financial data including a to-date calculation of the rate of return for the project using the same method utilized in its initial recommendation for the tax exemption within 180 days of receipt of all required financial information.

PHB will advise the owner in writing whether the projected rate of return will exceed 10 percent for the entire exemption period and may result in an Accrued Payment Liability (APL).

If PHB determines that the number and unit mix of affordable units is less than the approved percentage, the next available units must be rented to households meeting the income requirements and the project must be brought into compliance before the next reporting period.

- **Project rate of return** – At the end of the final year of the exemption, PHB will calculate the rate of return for the project during the exemption.

If the rate of return does not exceed 10 percent, then the EUA terminates at the end of exemption.



If the rate of return exceeds 10 percent, then PHB sends a written notice to the last known address of the owner requiring the owner to elect one of the following:

- The EUA may remain in full force and effect for an additional 5 years after the end of the tax exemption , extending the affordability requirements approved for the exemption; provided that the number of units subject to the rent restrictions as approved is the same number necessary to reduce the net present value, using a 10 percent annual discount rate of the project's projected market-rate (unrestricted) annual cash flows by an amount equal to the APL; or
- The owner pays an APL in an amount equal to the lesser of either:
  - The net present value using a 10 percent annual discount rate of the difference between the project's actual annual cash flows during the exemption and the proforma projected cash flows for the project that would provide a 10 percent rate of return during the exemption; or
  - The maximum amount of the property taxes that would have been assessed if no exemption had been granted.

#### **For-sale units**

- **Agreement/Notice** – Upon approval, applicants must execute a document to be recorded on title to the property requiring PHB verification of homebuyer affordability and owner-occupancy qualification prior to the sale of the property to the initial homebuyer.
- **Homebuyer verification** – The initial homebuyer must submit a verification form and supporting documentation at least 10 business days prior to closing on the home purchase and must not close without PHB review and response. The verification form must be signed by all homebuyers; income documentation should be submitted for all homebuyers who will both be on title to the property and living in the home.

Supporting income documentation includes the last two years of W2s, the most current month's worth of paystubs, and documentation of any additional income received such as social security, child support, alimony, or unemployment; self-employed homebuyers must submit two years of filed federal tax returns with all schedules and a current year-to-date profit and loss statement. PHB may require additional documentation in order to fully verify current income of the homebuyers including letters of explanation or affidavits.

- **PHB review prior to closing** – PHB will notify homebuyer and escrow of homebuyer qualification (affordability and owner-occupancy) prior to closing.
- **Sales over the price cap** – Escrow must notify PHB if a property is selling over the established price cap. If the exemption is already in effect, it will be terminated and escrow must request the amount of any taxes exempted due from Multnomah County to be paid at closing by the seller.
- **Construction completion** – The property must be fully constructed upon sale (documented by final permit or certificate of occupancy and usually verifiable by PHB through Portland Maps).
- **Verification of closing** – Homebuyers must send PHB documentation of the final sale price and title holders within 30 days of closing by submitting a copy of the recorded Warranty Deed or the Final HUD-1 Settlement Statement.

- **Subsequent homebuyers** – If a property with a tax exemption transfers title during the ten year exemption period, the exemption will continue as long as the property remains owner occupied.
- **Owner Occupancy** – The Property may not be rented at any time (both prior to initial sale and after homebuyer approval). After initial sale, the property must be owner occupied (or listed for sale and vacant) during the exemption period.

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## APPENDIX D

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### PORTLAND HOUSING BUREAU STATEMENT ON EQUITY AND SOCIAL JUSTICE

#### **Our Mission:**

To focus community resources on the unmet housing needs of the people of Portland

#### **Our Vision:**

The Portland Housing Bureau is committed to equity and social justice in its delivery of housing resources and opportunities to all residents from Portland's diverse and multicultural communities, including communities who define themselves as groups of people who share some or all of the following: geographic boundaries, sense of membership, culture, language, common norms and interests.

#### **We envision a community where:**

- All Portland residents can find, afford and retain safe homes in active, healthy neighborhoods of their choice.
- All Portland residents have equitable access to housing, housing resources and the opportunities that safe, stable housing provides.
- Housing discrimination and bias based on race and ethnicity is eliminated.
- Portland residents and neighborhoods thrive because the local housing sector aligns with other key sectors such as education, transportation, health and business to create a foundation for economic, social and cultural opportunity.

In Portland, people of color experience racism and encounter barriers to stable housing and housing resources at much higher rates than their White counterparts. This leads to people of color having more experiences of being in unsafe living conditions with less access to public goods, services and resources. Additionally, they have little or no power to influence the key policy decisions that directly impact them, and therefore, have diminished opportunities to thrive.

**Equity is defined as:** All residents from Portland's diverse and multicultural communities have access to the opportunities and resources they need to attain their full potential.

**Inequity** refers to differences in well-being between and within communities that are caused by barriers which are:

- Systematic
- Institutional
- Patterned
- Unfair
- Avoidable

Inequity is not random; rather it occurs because of past and current decisions, systems of power and privilege, policies and the repeated implementation of those policies in unfair ways.

**Social Justice** refers to all aspects of justice, including legal, political and economic. It demands fair distribution of public goods, institutional resources and life opportunities.

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## APPENDIX D

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We acknowledge that, in addition to race and ethnicity, people also experience housing barriers because of other protected status', such as income, immigration status, limited English proficiency, sexual orientation or disability.

PHB will work towards eliminating housing barriers of all kinds, but we must recognize Oregon's history of housing discrimination and social injustice and address current-day disparities in access to the resources, programs and opportunities experienced by communities of color. Therefore, our Statement on Equity and Social Justice focuses on eliminating housing inequities across Portland's diverse racial and ethnic groups.

PHB will apply the principles of equity and social justice when developing policies and organizational priorities, and when making financial investment decisions. PHB will strategically target resources in a manner that will seek to correct identified patterns of inequity for people of color.

To put our commitment to principles of Equity & Social Justice in action The Portland Housing Bureau will:

- Provide historically marginalized communities with "seats at the table" to influence decisions and spur actions that promote equity;
- Ask for and listen to the diversity of perspectives of our staff and our community members regarding the actions PHB should take to address inequality among communities of color;
- We will engage with communities of color who are affected by inequities, as well as groups who hold institutional power, to identify policies, programs and actions that will make a difference in eliminating systemic and institutional barriers;
- Look beyond individual behaviors to the social, economic, physical and historic factors that shape behaviors in communities;
- Fearlessly examine our current structures, policies and practices for racial bias and systemic and institutional discrimination;
- Take a comprehensive and systems-level approach to the work of dismantling structures, policies, and practices that reinforce inequity, and implementing new structures, policies, and practices that support social justice;
- Develop policies and deliver housing services that create conditions for all people to reach their full potential, especially groups and individuals who have experienced inequities in the past;
- At every level of leadership, we will foster a culture that supports multicultural awareness and respect, promotes equity and social justice, and upholds values of fairness and social justice;
- We will measure and monitor the impact of our actions on communities of color.

# APPENDIX E

## 2012 Median Income for a Family of Four:

**\$73,000**

Published by PORTLAND HOUSING BUREAU: 12/2/11

Effective: 12/1/11

### HUD Median Income Percentages - issued by HUD for Section 8 and other non-LIHTC projects

Household Size	30%	40%	45%	50%	55%	60%	65%	80%	2012 100% see NOTE	120%
1	15,350	20,440	22,995	25,550	28,105	30,660	33,215	40,900	<b>51,100</b>	61,320
2	17,550	23,360	26,280	29,200	32,120	35,040	37,960	46,750	<b>58,400</b>	70,080
3	19,750	26,280	29,565	32,850	36,135	39,420	42,705	52,600	<b>65,700</b>	78,840
4	21,900	29,200	32,850	36,500	40,150	43,800	47,450	58,400	<b>73,000</b>	87,600
5	23,700	31,560	35,505	39,450	43,395	47,340	51,285	63,100	<b>78,840</b>	94,608
6	25,450	33,880	38,115	42,350	46,585	50,820	55,055	67,750	<b>84,680</b>	101,616
7	27,200	36,240	40,770	45,300	49,830	54,360	58,890	72,450	<b>90,520</b>	108,624
8	28,950	38,560	43,380	48,200	53,020	57,840	62,660	77,100	<b>96,360</b>	115,632

- NOTES:** (1) 2012 Income levels have increased based on HUD's calculations for the Portland-Vancouver-Hillsboro, OR-WA MSA<sup>1</sup>. The income schedule above is to be used for projects that DO NOT qualify for the HERA Special tables as published by HUD 12/1/2011. If you have multiple funding sources, you must use incomes and rents applicable to the most restrictive program requirements. Projects that have LIHTC and/or tax-exempt bond funding should refer to the applicable tables for your county found at: [http://www.ohcs.oregon.gov/OHCS/HPM\\_income\\_limits.shtml](http://www.ohcs.oregon.gov/OHCS/HPM_income_limits.shtml).
- (2) Other 2012 MFI levels are based on the 4-Person Income Limit of \$73,000. The 1-Person family Income Limit is 70% of the 4-Person Income Limit, the 2-Person family Income Limit is 80% of the 4-Person Income Limit, the 3-Person family Income Limit is 90% of the 4-Person Income Limit. Each family size larger than four (4) is calculated by an 8% increase per HH member to the 4-Person Income Limit. (i.e., 5-Person = 108%; 6-Person = 116%; 7-Person = 124%; 8-Person = 132%, and so on).

**ALSO SEE HOME PROGRAM RENT LEVELS ISSUED BY HUD - SEPARATE SCHEDULE**  
The HOME rent levels may be more restrictive for some bedroom sizes.

### 2012 Housing Affordability: Maximum Monthly Rent Including Utilities by Median Family Income With a Housing Burden of 30%<sup>2</sup> (effective 12/1/11)

# of Bedrooms	Household Size	30%	40%	45%	50% Compare Low HOME	55%	60%	65% Compare High HOME	80%	100%	120%
0	1	383	511	574	638	702	766	830	1,022	<b>1,277</b>	1,533
1	1.5	411	547	615	684	752	821	889	1,095	<b>1,368</b>	1,642
2	3	493	657	739	821	903	985	1,067	1,315	<b>1,642</b>	1,971
3	4.5	570	759	854	949	1,044	1,139	1,234	1,518	<b>1,898</b>	2,277
4	6	636	847	952	1,058	1,164	1,270	1,376	1,693	<b>2,117</b>	2,540
5	7.5	701	935	1,051	1,168	1,285	1,402	1,519	1,869	<b>2,336</b>	2,803

(Based on the HUD Portland<sup>1</sup> Area Median Income published effective December 1, 2011: \$73,000 for a family of four. Income & Rents above are based on 4-Person Income Limit of \$73,000. Rent calculations are rounded down to the nearest \$1.00).



### Portland Housing Bureau

421 SW 6th Avenue, Suite 500 | Portland, OR 97204  
503-823-2375 | Fax: 503-823-2387 | MFI Tables: 503-823-3259

Fair Market Rent for 2012	
Bedroom Size	FMR
SRO	\$499
0	\$665
1	\$771
2	\$891
3	\$1,297
4	\$1,558
5	\$1,792
6	\$2,025

<sup>1</sup> Portland-Vancouver-Hillsboro, OR-WA MSA = Clackamas, Clark, Columbia, Multnomah, Skamania, Washington & Yamhill Counties

<sup>2</sup> Rents can be set below the median family income % threshold. For instance a residential unit may be restricted to households at or below 50% MFI, but have one-bedroom rents (and utilities expenses) that are below \$684/month.

# APPENDIX F

## SCHEDULE OF UTILITY ALLOWANCES

### SECTION 8 PROPERTIES

Effective April 1, 2012 (except Annuals eff July 1, 2012)

		0 BD	1 BD	2 BD	3 BD	4 BD	5 BD	6 BD	7 BD
A L L	ELECTRIC-MONTHLY SERVICE CHARGE	\$9	\$9	\$9	\$9	\$9	\$9	\$9	\$9
	LIGHTS & REFRIG.	\$12	\$17	\$22	\$27	\$34	\$39	\$45	\$50
	FAN	\$2	\$3	\$4	\$4	\$5	\$6	\$7	\$8
E L E C T	COOKING	\$5	\$7	\$9	\$11	\$14	\$16	\$18	\$20
	HOT WATER	\$22	\$31	\$40	\$49	\$62	\$71	\$80	\$90
	SPACE HEAT (EXIST. S/F DETACHED)		\$62	\$77	\$93	\$111	\$123	\$144	\$161
	SPACE HEAT (NEW S/F DETACHED)		\$30	\$42	\$46	\$54	\$61	\$70	\$78
	SPACE HEAT (EXIST. MULTIPLEX)	\$35	\$40	\$59	\$72	\$84	\$96	\$109	\$121
	SPACE HEAT (NEW MULTIPLEX)	\$18	\$25	\$31	\$38	\$44	\$51	\$57	\$64
G A S	GAS-MONTHLY SERVICE CHARGE	\$6	\$6	\$6	\$6	\$6	\$6	\$6	\$6
	COOKING	\$4	\$6	\$8	\$10	\$13	\$14	\$16	\$18
	HOT WATER	\$12	\$16	\$21	\$26	\$33	\$38	\$43	\$48
	SPACE HEAT (EXIST. S/F DETACHED)		\$42	\$53	\$64	\$76	\$85	\$99	\$110
	SPACE HEAT (NEW S/F DETACHED)		\$18	\$23	\$27	\$32	\$36	\$41	\$46
	SPACE HEAT (EXIST. MULTIPLEX)	\$24	\$33	\$40	\$50	\$57	\$66	\$75	\$83
	SPACE HEAT (NEW MULTIPLEX)	\$11	\$15	\$18	\$22	\$26	\$30	\$34	\$38
O I L	HOT WATER	\$32	\$45	\$58	\$71	\$90	\$103	\$116	\$129
	SPACE HEAT (EXIST. S/F DETACHED)		\$143	\$180	\$217	\$258	\$287	\$335	\$373
	SPACE HEAT (NEW S/F DETACHED)		\$61	\$79	\$93	\$108	\$122	\$140	\$156
	SPACE HEAT (EXIST. MULTIPLEX)	\$81	\$111	\$137	\$168	\$194	\$223	\$253	\$282
	SPACE HEAT (NEW MULTIPLEX)	\$37	\$50	\$62	\$76	\$88	\$101	\$114	\$128
W T R	INSIDE PORTLAND	\$0	\$13	\$17	\$20	\$26	\$30	\$33	\$37
	INSIDE GRESHAM	\$17	\$19	\$21	\$23	\$26	\$28	\$30	\$32
	OTHER AREAS	\$7	\$10	\$13	\$16	\$21	\$24	\$26	\$29
S W R	SEWER- SINGLE FAMILY DWELLING		\$63	\$72	\$81	\$95	\$104	\$113	\$122
	SEWER- Troutdale (all building types)	\$31	\$31	\$31	\$31	\$31	\$31	\$31	\$31
	SEWER- MULTI-FAMILY DWELLING	\$41	\$50	\$59	\$68	\$82	\$91	\$100	\$109
GAR	GARBAGE/ SOLID WASTE (WEEKLY P/U)	\$25	\$25	\$25	\$25	\$25	\$25	\$25	\$25
	USE SAME RATE FOR GRESHAM AND OTHER AREAS								
A P P L	TENANT OWNED								
	APPLIANCES	REFRIG.	\$5	\$5	\$5	\$5	\$5	\$5	\$5
		RANGE	\$3	\$3	\$3	\$3	\$3	\$3	\$3

TOTAL

EXISTING SINGLE FAMILY DETACHED OR MULTIPLEX ARE UNITS NOT WEATHERIZED AND CONSTRUCTED IN OR BEFORE 1980  
 WEATHERIZED (3 OF 4)    WINDOWS \_\_\_\_\_ CEILING \_\_\_\_\_ FLOOR \_\_\_\_\_ WALLS \_\_\_\_\_

NEW SINGLE FAMILY DETACHED OR MULTIPLEX-DOUBLE GLASS ARE UNITS WEATHERIZED OR CONSTRUCTED AFTER 1980  
 SERVICE CHARGES ARE FIXED FOR ELECTRIC, GAS, AND WATER/SEWER.

ALL CHARGES FOR ELECTRIC ARE AVERAGED BETWEEN PP&L AND PGE  
 4522 HDD USED IN COMPUTATIONS

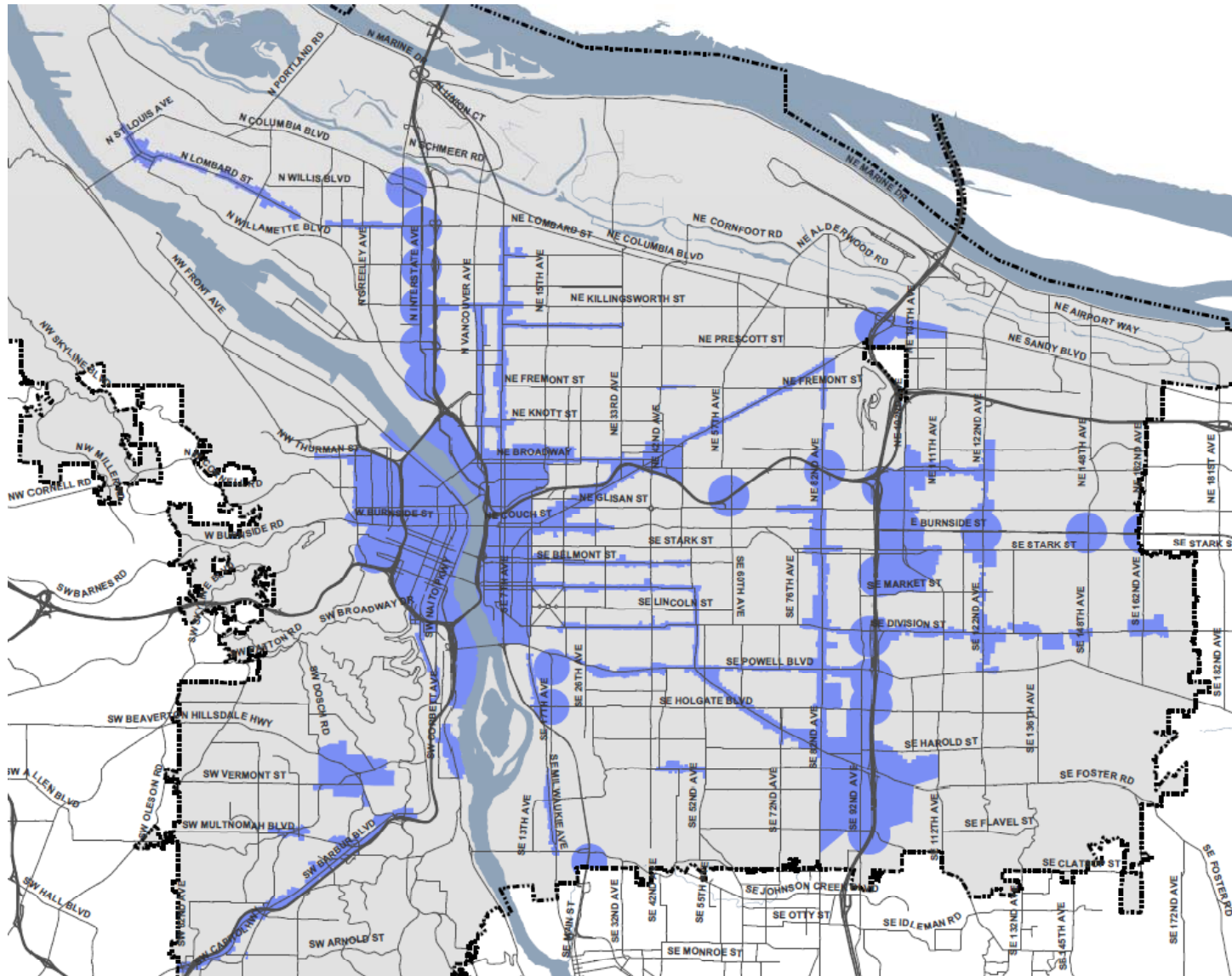
LIGHTS INCLUDE REFRIGERATOR, OVERHEAD LIGHTS, LAMPS AND OUTLETS.

REFERENCE HUD-52667 FOR ALLOWANCE TABLES

SINGLE FAMILY SEWER RATE FOR PORTLAND ALSO APPLIES TO DUPLEXES

FMR	
-UA	
MAX	

# APPENDIX G



June 25, 2012  
 City of Portland, Oregon  
 Bureau of Planning & Sustainability  
 Geographic Information System

## Multiple-Unit Limited Tax Exemption (MULTE) Program Eligibility Areas

- MULTE Eligibility Areas
- City Boundary



The information on this map was derived from City of Portland GIS databases. Care was taken in the creation of this map but it is provided "as is". The City of Portland cannot accept any responsibility for error, omissions or positional accuracy.



# APPENDIX H

