

HOUSING and COMMUNITY SERVICES, OREGON

Annual Performance Progress Report (APPR) for Fiscal Year (2008-2009)

Proposed KPM's for Biennium (2009-2011)

Original Submission Date: 2009

Finalize Date: 10/4/2009

2008-2009 KPM #	2008-2009 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 recipient 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.

2008-2009 KPM #	2008-2009 Approved Key Performance Measures (KPMs)
9	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.

HOUSING and COMMUNITY SERVICES, OREGON

I. EXECUTIVE SUMMARY

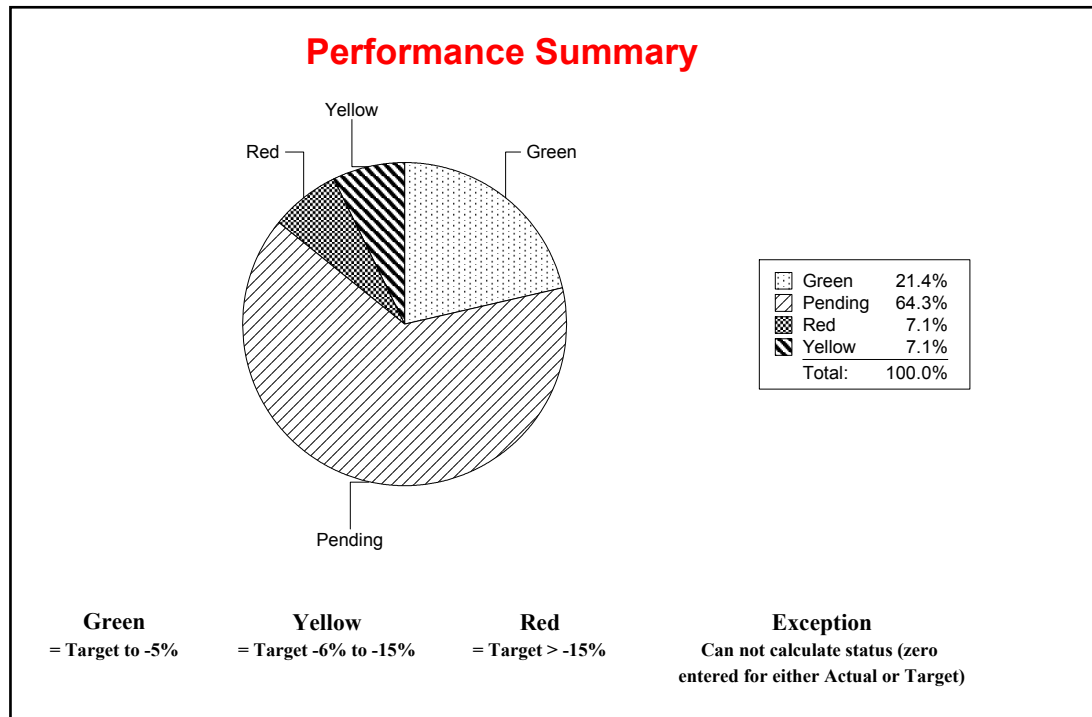
Agency Mission: Provide leadership that enables Oregonians to gain housing, become self-sufficient, and achieve prosperity.

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Alternate Phone: 503-986-2076



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 Departments 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 Departments 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

KPM Progress Summary

Key Performance Measures (KPMs) with Page References

of KPMs

KPMs MAKING PROGRESS at or trending toward target achievement

Affordable Home Ownership (pages 8-13), Reducing Homelessness (pages 16-17), Affordable Rental Housing through Bonds (pages 18-19), Increasing Energy Savings (pages 28-29), Housing for Special Needs Individuals (pages 30-31), Food Insecurity (pages 34-35).

7

KPMs NOT MAKING PROGRESS not at or trending toward target achievement

Affordable Rental Housing through Grants (pages 20-27), Increasing Agency Customer Service (pages 32-33).

2

KPMs - PROGRESS UNCLEAR target not yet set

Affordable Home Ownership Education (pages 14-15),.

1

10

Total Number of Key Performance Measures (KPMs)

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 Departments budget contains less than 1% of state General Fund. Approximately 10% of the Departments 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 Departments effectiveness in reaching program goals within its continuum of services.

The following questions indicate how performance measures and data are used for management and accountability purposes.

1 INCLUSIVITY

Describe the involvement of the following groups in the development of the agencies performance measures.

Staff: The specific program staff linked to each KPM helped in the development of each measurement.

Elected Officials: There was no elected official involvement in the development of these measures.

Stakeholders: There were some stakeholders involved in the development of the Food Insecurity KPM..

Citizens: There was no citizen involvement in the development of these measures.

2 MANAGING FOR RESULTS

How are performance measures used for management of the agency? What changes have been made in the past year?

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 Departments expectations to potential developers.

3 STAFF TRAINING

What training has staff had in the past year on the practical value and use of performance measures?

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.

4 COMMUNICATING RESULTS

How does the agency communicate performance results to each of the following audiences and for what purpose?

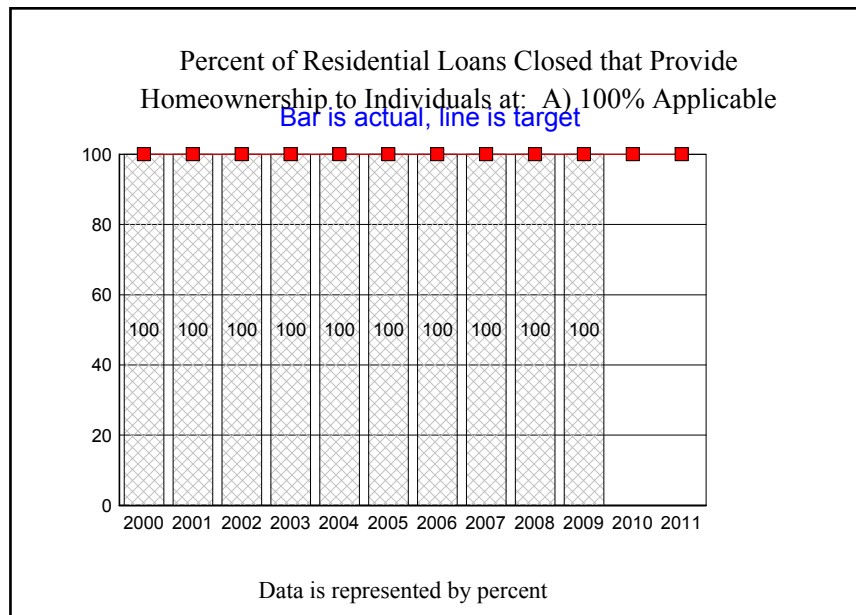
Staff: Every employee is provided a copy of this annual report to see how their programs performed.

Elected Officials: Communicated through Internet

Stakeholders: Communicated through Internet

Citizens: Communicated through Internet

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



1. OUR STRATEGY

OHCSs 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 origination 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.

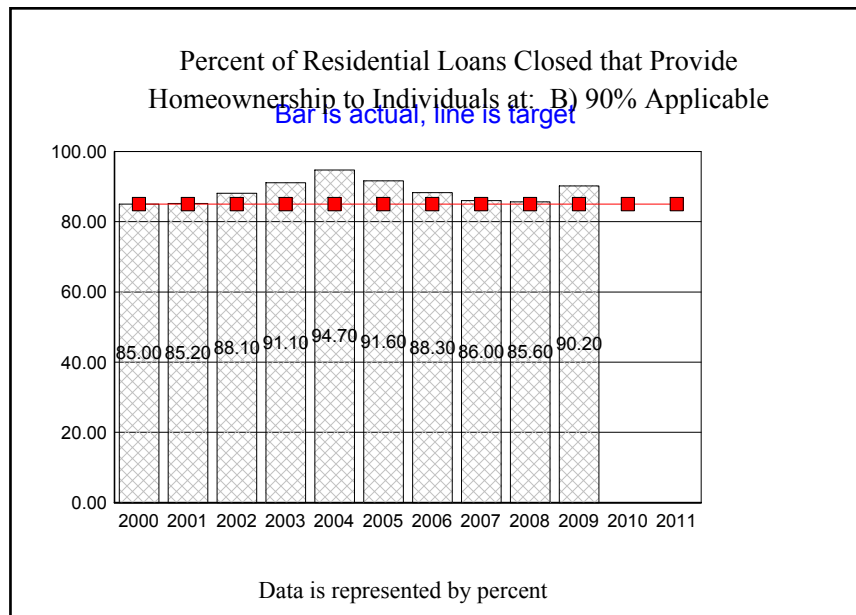
6. WHAT NEEDS TO BE DONE

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 Departments Loan Information Processing System. This data is very reliable as it is reconciled with bank servicers on a monthly basis

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



1. OUR STRATEGY

OHCSs 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 origination 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 90.2%, well above the goal of 85%.

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.

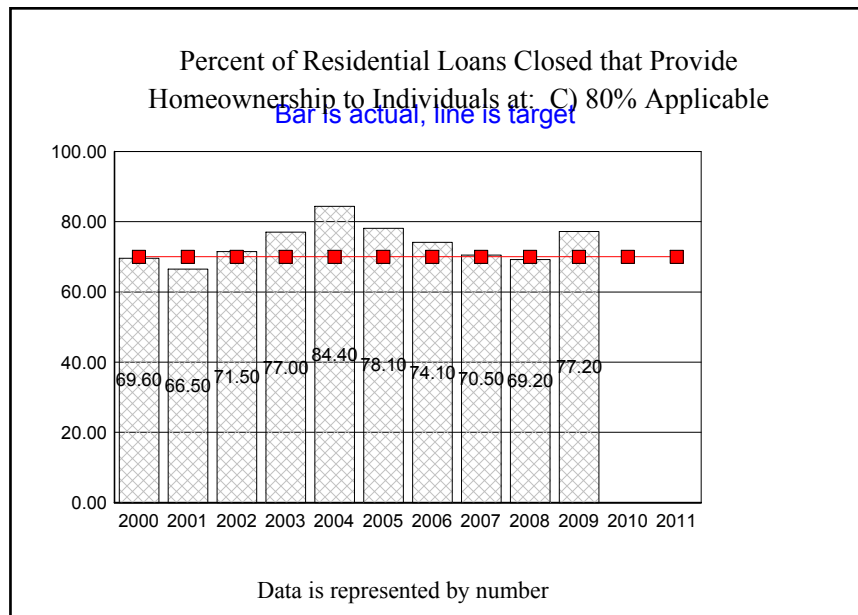
6. WHAT NEEDS TO BE DONE

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 Departments Loan Information Processing System. This data is very reliable as it is reconciled with bank servicers on a monthly basis

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



1. OUR STRATEGY

OHCSs 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 origination 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 77.2%, higher than the target of 70%.

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.

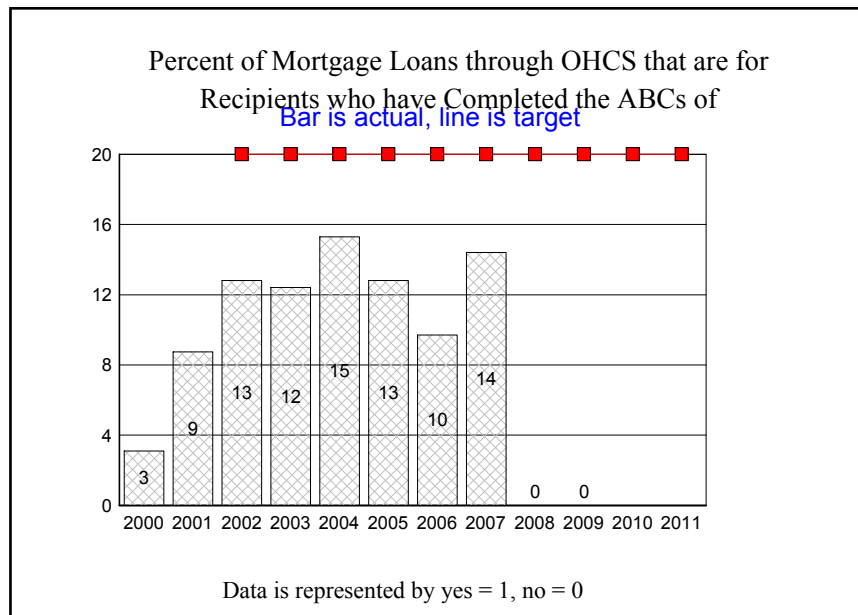
6. WHAT NEEDS TO BE DONE

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 Departments Loan Information Processing System. This data is very reliable as it is reconciled with bank servicers on a monthly basis

KPM #2	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
Goal	This measure was removed by the 2009 Oregon Legislature. Data is no longer available for this measure.	
Oregon Context	OBM #73 Homeownership: Percent of households that are owner occupied.	
Data Source	OHCS Loan Information Processing System	
Owner	Housing Finance Section Dona Lanterman (503) 986-2120	



1. OUR STRATEGY

OHCSs strategy is to ensure that low-income Oregonians who receive a loan through the Departments 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 Departments 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

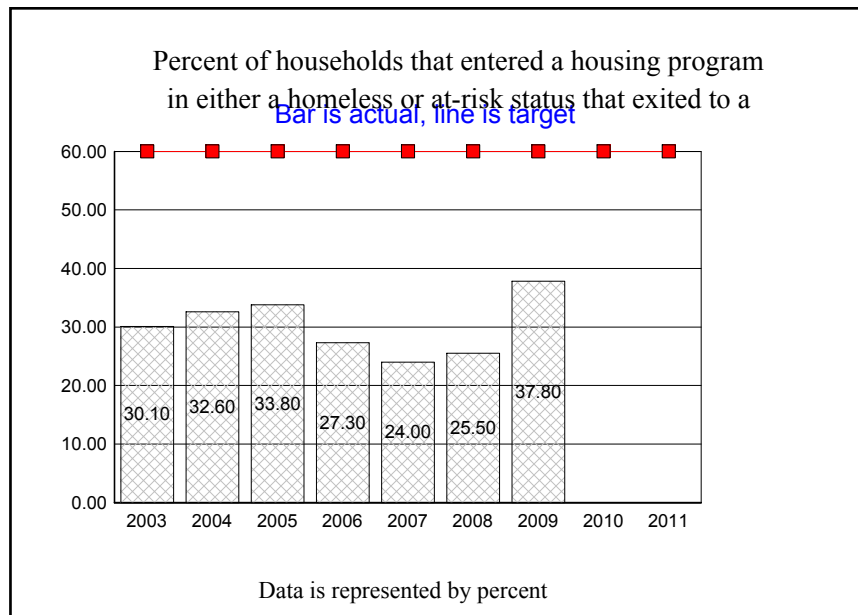
6. WHAT NEEDS TO BE DONE

N/A

7. ABOUT THE DATA

Data was provided for the fiscal year from the Departments 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.

KPM #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.	2001
Goal	Housing Insecurity And Homelessness: Reduce housing insecurity and homelessness in Oregon.	
Oregon Context	OBM #56 Homelessness: Number of Oregonians that are homeless on any given night (per 10,000).	
Data Source	OHCS Community Services Block Grant Report and Annual Homeless Statistical Report	
Owner	Community Services Section Lynn Adams (503) 986-6736	



1. OUR STRATEGY

OHCSs strategy is ensure that homeless households or those at-risk of becoming homeless that are participating in the Departments 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 2008, 37.8% of the households that entered in a OHCS homeless program exited into a stable housing situation. This is a marked 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.

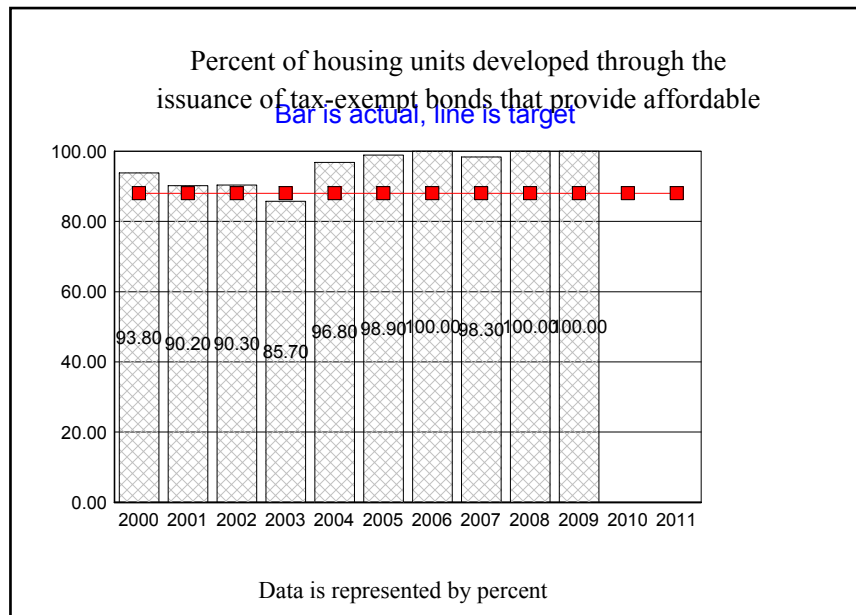
6. WHAT NEEDS TO BE DONE

In July 2008, the Ending Homelessness Advisory Council (EHAC), a statewide working group of experts and community representatives, completed work on the Governors 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.

KPM #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.	2001
Goal	Housing Insecurity And Homelessness: Reduce housing insecurity and homelessness in Oregon.	
Oregon Context	OBM #74a - Affordable Housing: Percent of Oregon households below median income spending 30% or more of their income on housing (including utilities) a. renters.	
Data Source	OHCS Loan Information Processing System	
Owner	Housing Finance Section manager, David Summers (503) 986-2073	



1. OUR STRATEGY

OHCSs 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 Departments bond programs for individuals at or below 60% area median income.

3. HOW WE ARE DOING

In 2009, 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.

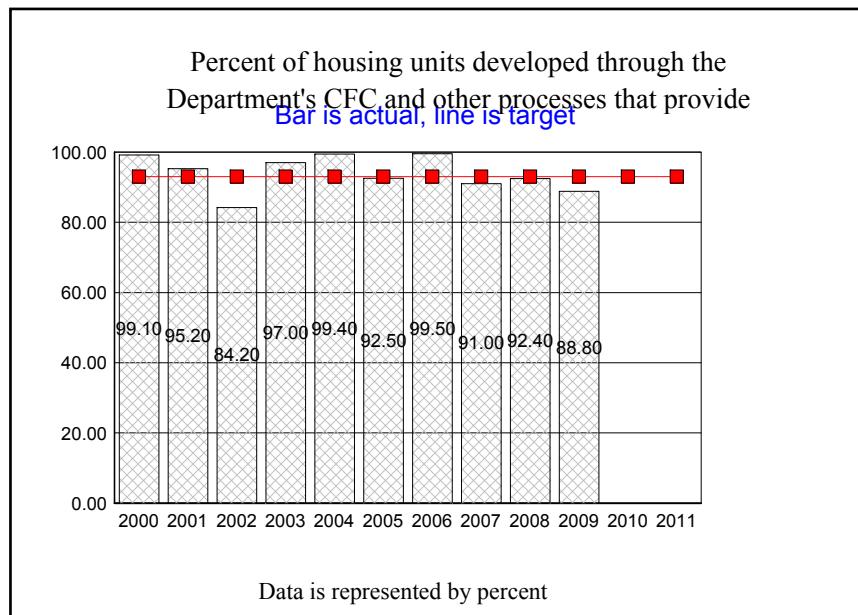
6. WHAT NEEDS TO BE DONE

The biggest change that would impact this particular measure would be to reduce construction cost (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 Departments Loan Information Processing System. This data is very reliable as it is reconciled with bank servicers on a monthly basis.

KPM #5a	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
Goal	Housing Insecurity And Homelessness: Reduce housing insecurity and homelessness in Oregon.	
Oregon Context	OBM #74a - Affordable Housing: Percent of Oregon households below median income spending 30% or more of their income on housing (including utilities) a. renters.	
Data Source	OHCS Data Information System for Housing	
Owner	Housing Finance Section manager, David Summers (503) 986-2073	



1. OUR STRATEGY

OHCSs 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 Departments grant and tax-credit programs for individuals at or below 60% area median income.

3. HOW WE ARE DOING

In 2009, OHCS did not meet its goals for this measure achieving 88.8%, 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. This trend is reflected in this years 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 Departments 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.

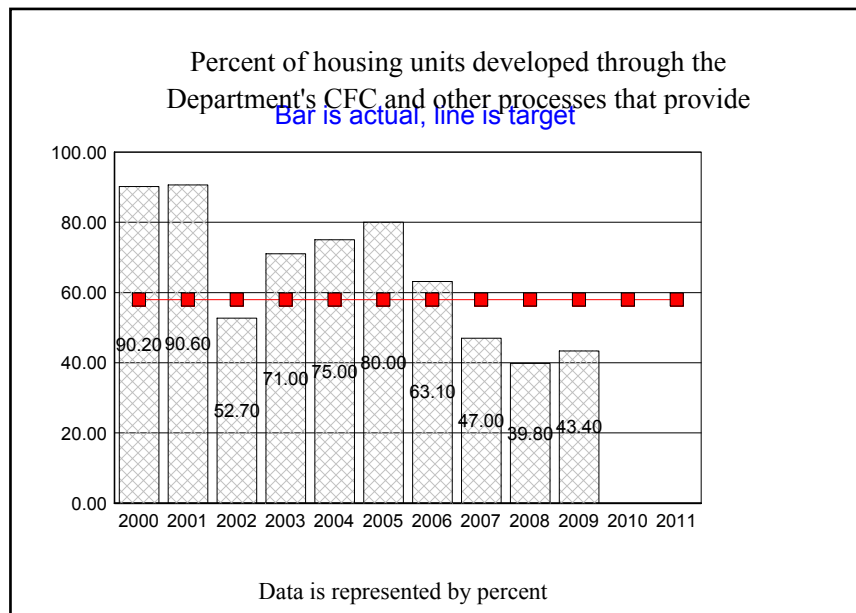
6. WHAT NEEDS TO BE DONE

OHCS will need to identify additional resources to keep up with the increase 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 Departments Data Information System for Housing. This data is very reliable as it is reconciled with an additional data captured in Excel spreadsheets.

KPM #5b	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
Goal	Housing Insecurity And Homelessness: Reduce housing insecurity and homelessness in Oregon.	
Oregon Context	OBM #74a - Affordable Housing: Percent of Oregon households below median income spending 30% or more of their income on housing (including utilities) a. renters.	
Data Source	OHCS Data Information System for Housing	
Owner	Housing Finance Section manager, David Summers (503) 986-2073	



1. OUR STRATEGY

OHCSs 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 Departments grant and tax-credit programs for individuals at or below 50% area median income.

3. HOW WE ARE DOING

In 2009, OHCS did not meet its goals for this measure achieving 43.4%, 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. This trend is reflected in this years 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 Departments 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.

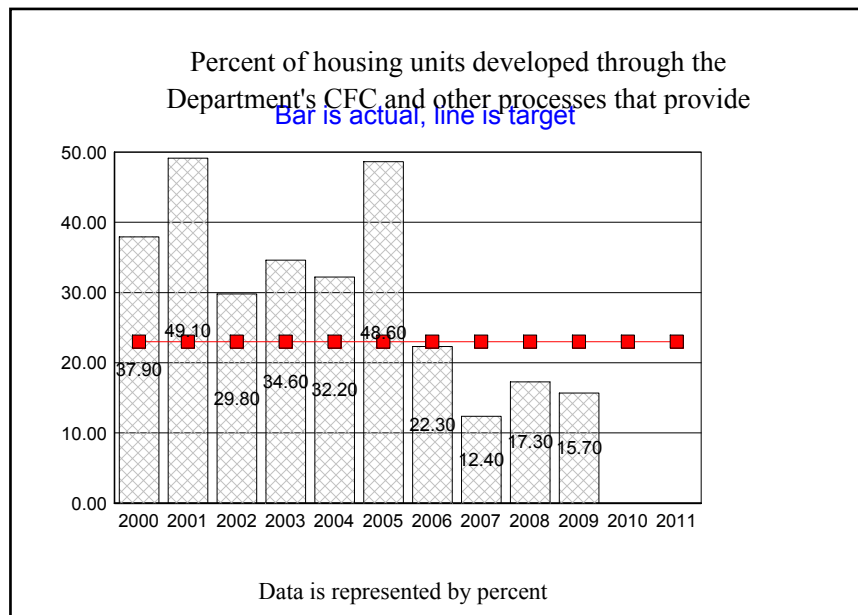
6. WHAT NEEDS TO BE DONE

OHCS will need to identify additional resources to keep up with the increase 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 Departments Data Information System for Housing. This data is very reliable as it is reconciled with an additional data captured in Excel spreadsheets.

KPM #5c	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
Goal	Housing Insecurity And Homelessness: Reduce housing insecurity and homelessness in Oregon.	
Oregon Context	OBM #74a - Affordable Housing: Percent of Oregon households below median income spending 30% or more of their income on housing (including utilities) a. renters.	
Data Source	OHCS Data Information System for Housing	
Owner	Housing Finance Section manager, David Summers (503) 986-2073	



1. OUR STRATEGY

OHCSs 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 Departments grant and tax-credit programs for individuals at or below 40% area median income.

3. HOW WE ARE DOING

In 2009, OHCS did not meet its goals for this measure achieving 15.7%, 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. This trend is reflected in this years 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 Departments 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.

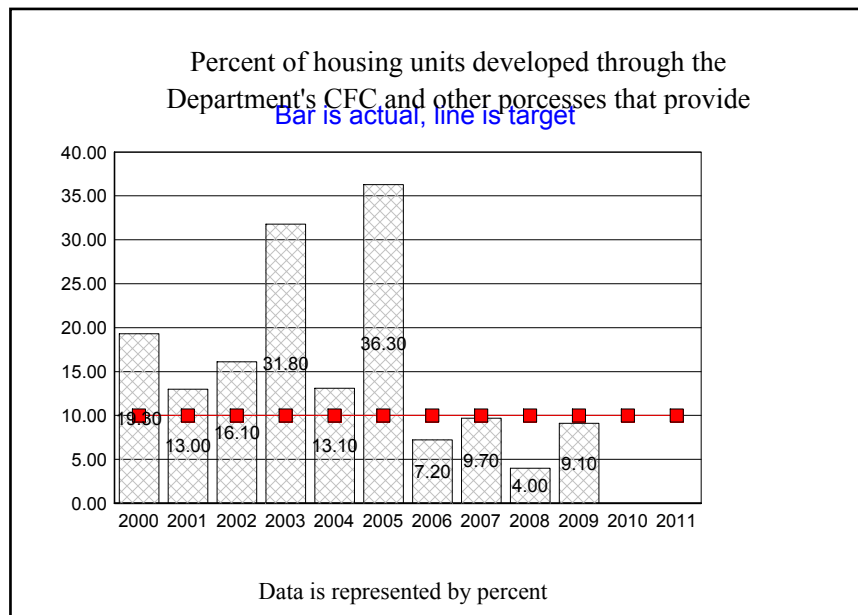
6. WHAT NEEDS TO BE DONE

OHCS will need to identify additional resources to keep up with the increase 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 Departments Data Information System for Housing. This data is very reliable as it is reconciled with an additional data captured in Excel spreadsheets.

KPM #5d	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
Goal	Housing Insecurity And Homelessness: Reduce housing insecurity and homelessness in Oregon.	
Oregon Context	OBM #74a - Affordable Housing: Percent of Oregon households below median income spending 30% or more of their income on housing (including utilities) a. renters.	
Data Source	OHCS Data Information System for Housing	
Owner	Housing Finance Section manager, David Summers (503) 986-2073	



1. OUR STRATEGY

OHCSs 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 10% of the units developed in the Departments grant and tax-credit programs for individuals at or below 30% area median income.

3. HOW WE ARE DOING

In 2009, OHCS did not meet its goals for this measure achieving 9.1%, slightly 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. This trend is reflected in this years 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 Departments 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.

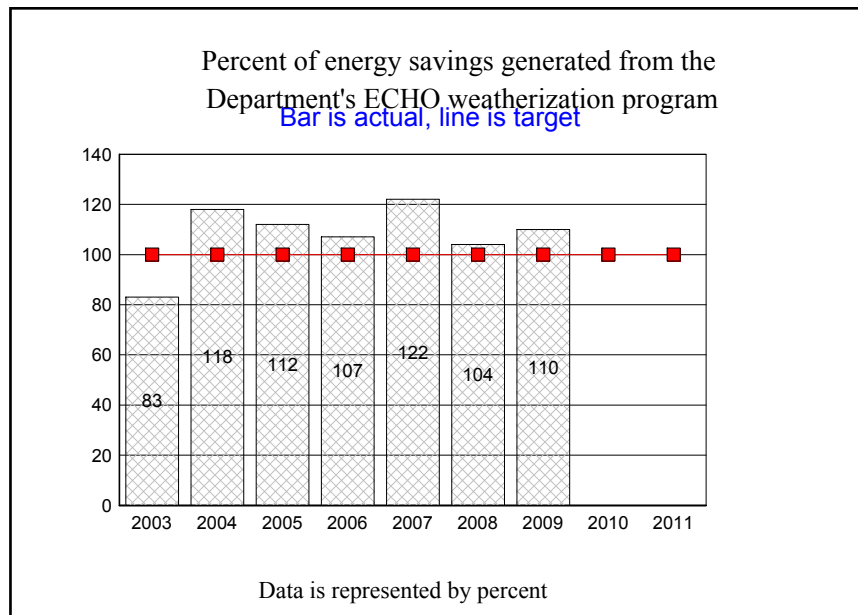
6. WHAT NEEDS TO BE DONE

OHCS will need to identify additional resources to keep up with the increase 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 Departments Data Information System for Housing. This data is very reliable as it is reconciled with an additional data captured in Excel spreadsheets.

KPM #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.	2003
Goal	Self-Sufficiency: Increase self-sufficiency among low-income Oregonians	
Oregon Context	No Specific State Benchmark Agency Goal: To increase energy savings in Oregon	
Data Source	Quarterly Community Action Agency Reports and the Economics of Energy Calculator	
Owner	Community Resources Section, Richard Matthews, (503) 986-2097	



1. OUR STRATEGY

OHCSs 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 110% in 2009. 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.

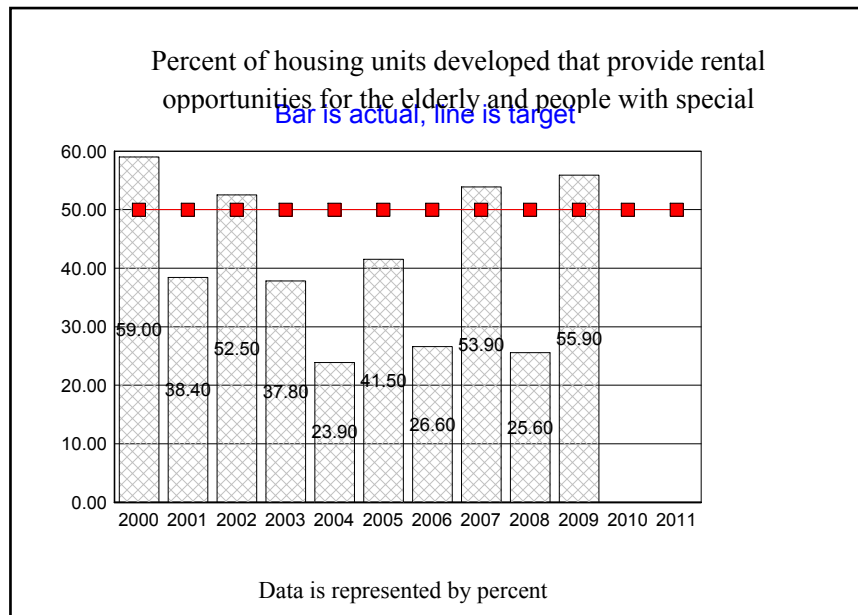
6. WHAT NEEDS TO BE DONE

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.

KPM #7	Increasing Housing for Special Needs Individuals – Percent of housing units developed that provide rental opportunities for the elderly and individuals with special needs.	2001
Goal	Self-Sufficiency: Increase self-sufficiency among low-income Oregonians	
Oregon Context	OBM #74a - Affordable Housing: Percent of Oregon households below median income spending 30% or more of their income on housing (including utilities) a. renters.	
Data Source	OHCS Loan Information Processing System and Data Information System for Housing	
Owner	Housing Resources Section, David Summers (503) 986-2073	



1. OUR STRATEGY

OHCSs strategy is to provide affordable housing opportunities for individuals with special needs. These include, but are not limited to: elderly,

disabled, homeless, 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 2009, 55.9% 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 Departments 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.

KPM #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.	2006
Goal	Provide our customers with great customer service.	
Oregon Context	No specific benchmark. Established through the standards provided by the Oregon Progress Board	
Data Source	Biennial External Customer Service Survey	
Owner	Research and Analysis Section, Information Services Division, Bill Carpenter, 503-986-2128	



1. OUR STRATEGY

OHCSs 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 Departments 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 2009 we did our third customer service survey and the Department did not meet its target in all categories - scoring above 75% but below 80% in availability of information and timeliness. We met our targets in all other categories. This survey is done biennially; the next new survey will be done in 2011.

4. HOW WE COMPARE

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

5. FACTORS AFFECTING RESULTS

In 2007, we had significant survey fatigue among our customers and so we changed this measure from a yearly survey to a biennial survey. This has improved the survey response rate.

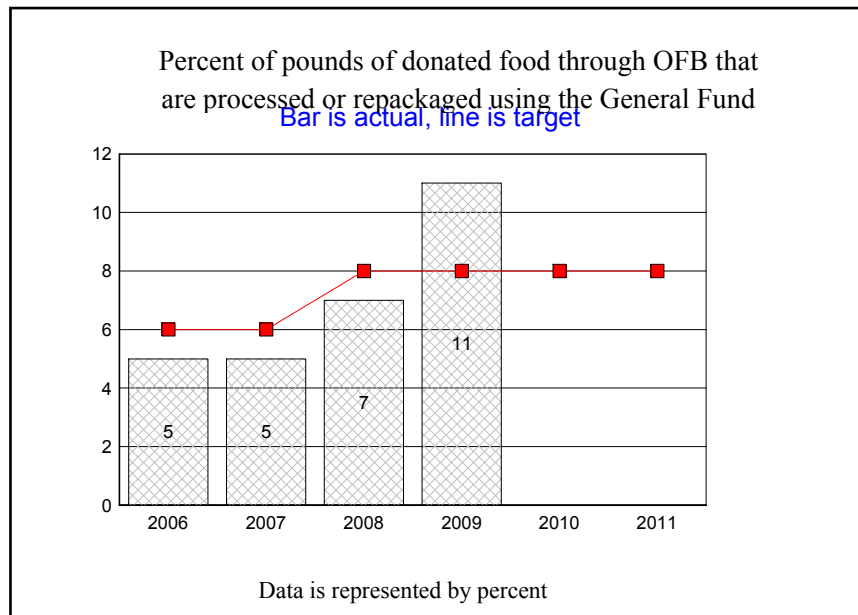
6. WHAT NEEDS TO BE DONE

OHCS continues to work to improve our 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 an biennial basis to a statistically valid sample of OHCS partners and key stakeholders.

KPM #9	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
Goal	Self-Sufficiency: Increase self-sufficiency among low-income Oregonians	
Oregon Context	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.	
Data Source	USDA annual report; Center on Hunger and Poverty, Brandeis University.	
Owner	Community Services Section, Sheila Parkins; (503) 986-2062	



1. OUR STRATEGY

The Departments 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 Departments 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 was increased from 6% in 2007.

3. HOW WE ARE DOING

For 2009, the General Fund Food Program contributed 11% 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. In addition, the Department will need to seek increased funding to support this effort.

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 Banks excellent system for tracking donated food.

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

Contact: Bill Carpenter

Contact Phone: 503-986-2128

Alternate: Rick Crager

Alternate Phone: 503-986-2076

The following questions indicate how performance measures and data are used for management and accountability purposes.

1. INCLUSIVITY

- * **Staff :** Staff: The specific program staff linked to each KPM helped in the development of each measurement.
- * **Elected Officials:** Elected Officials: There was no elected official involvement in the development of these measures.
- * **Stakeholders:** Stakeholders: There were some stakeholders involved in the development of the Food Insecurity KPM..
- * **Citizens:** Citizens: There was no citizen involvement in the development of these measures.

2 MANAGING FOR RESULTS

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 Departments expectations to potential developers. Note that the department will consider revising its performance measurements as part of its 2009-11 Strategic Plan.

3 STAFF TRAINING

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.

4 COMMUNICATING RESULTS

- * **Staff :** Staff: Every employee is provided a copy of this annual report to see how their programs performed.
- * **Elected Officials:** Elected Officials: Communicated through Internet
- * **Stakeholders:** Stakeholders: Communicated through Internet
- * **Citizens:** Citizens: Communicated through Internet