OREGON HOUSING & COMMUNITY SERVICES

Multifamily Energy Program

OR-MEP Open Enrollment 2024 – Round 2

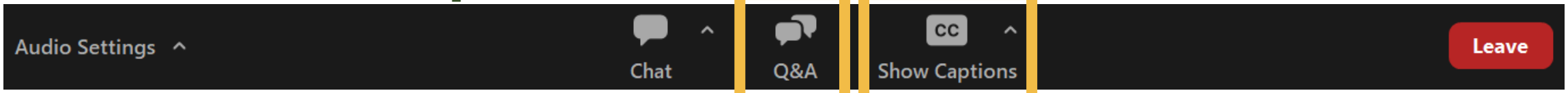
Date: July 24, 2024

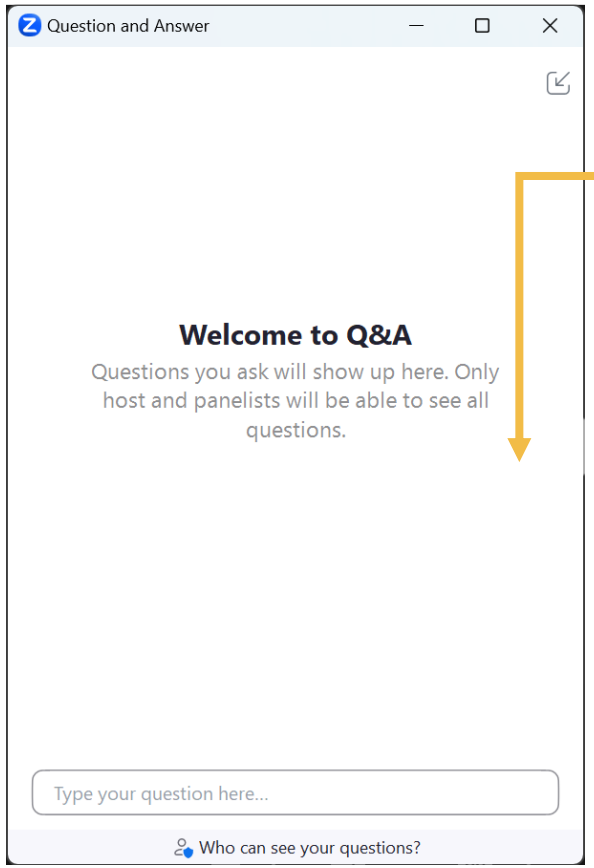
Presenters: Mekha Abraham, Julia Sinex

OREGON HOUSING and COMMUNITY SERVICES

TRC

How to Participate in Zoom





Q&A

Enter Questions in Q&A window. Questions will be answered at the end.

Show Captions

Click "Show Captions" to enable captions and select arrow icon (^) to select language.

Agenda

- **OR-MEP Program Overview**
- **Open Enrollment Application Process**
  - Updates Compared to Last Round
  - Open Enrollment Requirements & Criteria
  - Live Demo of Application
- **Q&A**

OR-MEP Program Overview

Oregon Multifamily Energy Program (OR-MEP)

Cash incentives and design support for energy efficiency upgrades in affordable multifamily rental retrofits and new construction.

HVAC
Heating
Cooling
Fans
Smart Thermostats

WATER
Water Heaters
Pumps & Controls
Showerheads
Aerators

ENVELOPE
Windows
Insulation

LIGHTING & APPLIANCES
Kitchen Appliances
Outdoor Lighting
Indoor Lighting
Laundry

Funded through Public Purpose Charge from:

- Pacific Power
- Portland General Electric

OR-MEP Program Goal

To reduce the energy burden for residents across affordable multifamily rental housing.

Efficient Building Design

Influence building design to reduce energy consumption.

Efficient Building Use

Inform and engage residents on building use to reduce energy use/cost and increase comfort.

Oregon Multifamily Energy Program (OR-MEP)

♦ Eligibility Requirements

Any project pursuing OHCS Multifamily Energy Program (OR-MEP) incentives must:

- **Be an existing or new construction multifamily rental property with at least 5 residential units per building (campuses of 5+ duplexes, triplexes, and quadplexes are also eligible)**
- **Receive electricity from Pacific Power or Portland General Electric**
- **Be heated by a hard-wired electrical heating system**
- **Meet program affordability requirements, where residents in at least 50% of units are at or below 80% area median income (AMI) and units must remain affordable for at least 10 years**

Open Enrollment Application Process

- Updates Compared to Last Round
- Open Enrollment Requirements & Criteria
- Live Demo of Application

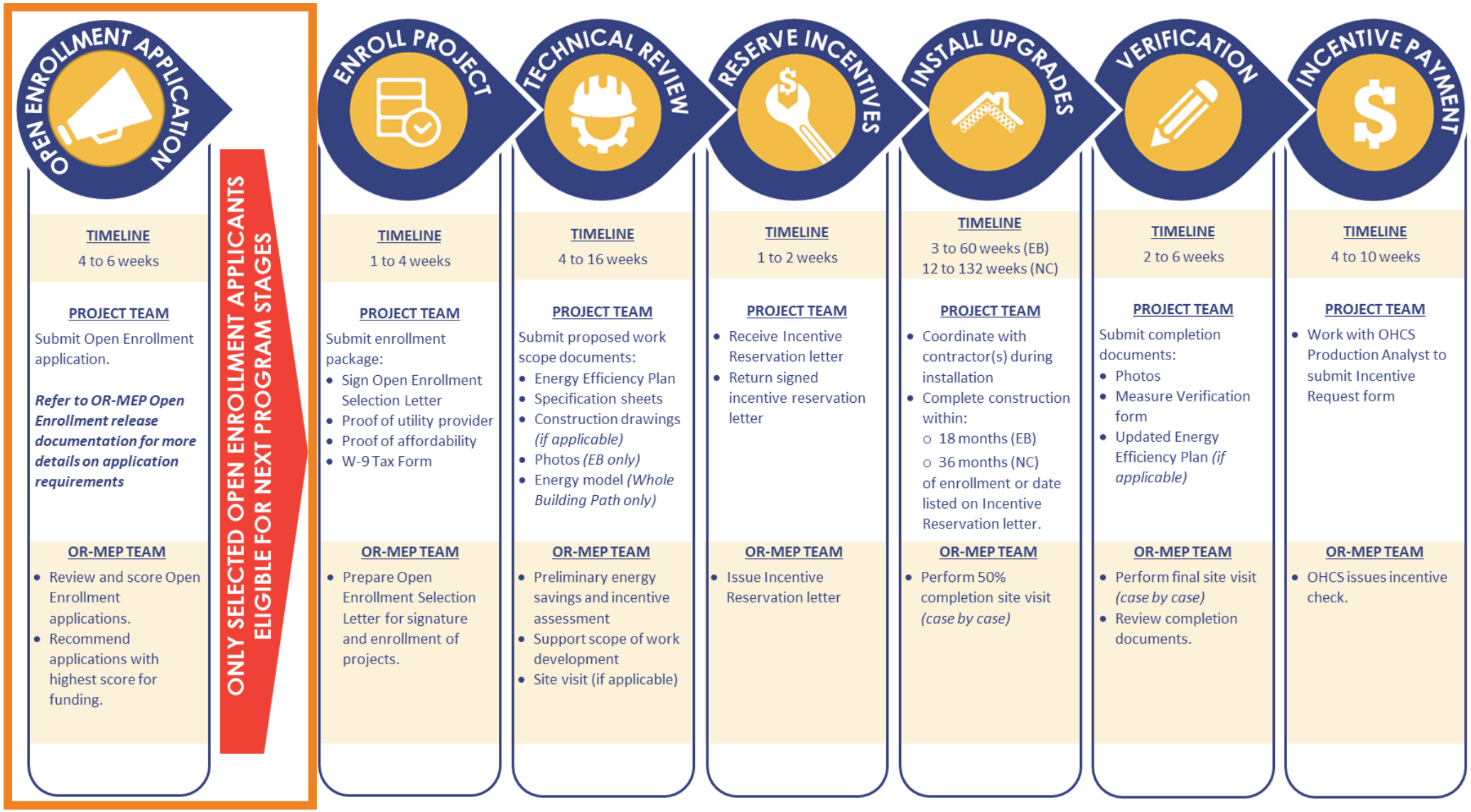
Open Enrollment | 2024 – Round 2

Enrollment Timeline

Enrollment Stage	Date
OR-MEP Open Enrollment - 2024 Round 2 Opens	Monday, July 15, 2024
OR-MEP Open Enrollment - 2024 Round 2 Closes	Friday, August 30, 2024, 5:00pm PST
Notice of Selected Projects Issued for OR-MEP Open Enrollment – 2024 Round 2	By Tuesday, October 1, 2024

These dates may be subject to change at the discretion of OHCS.

OR-MEP Participation Process

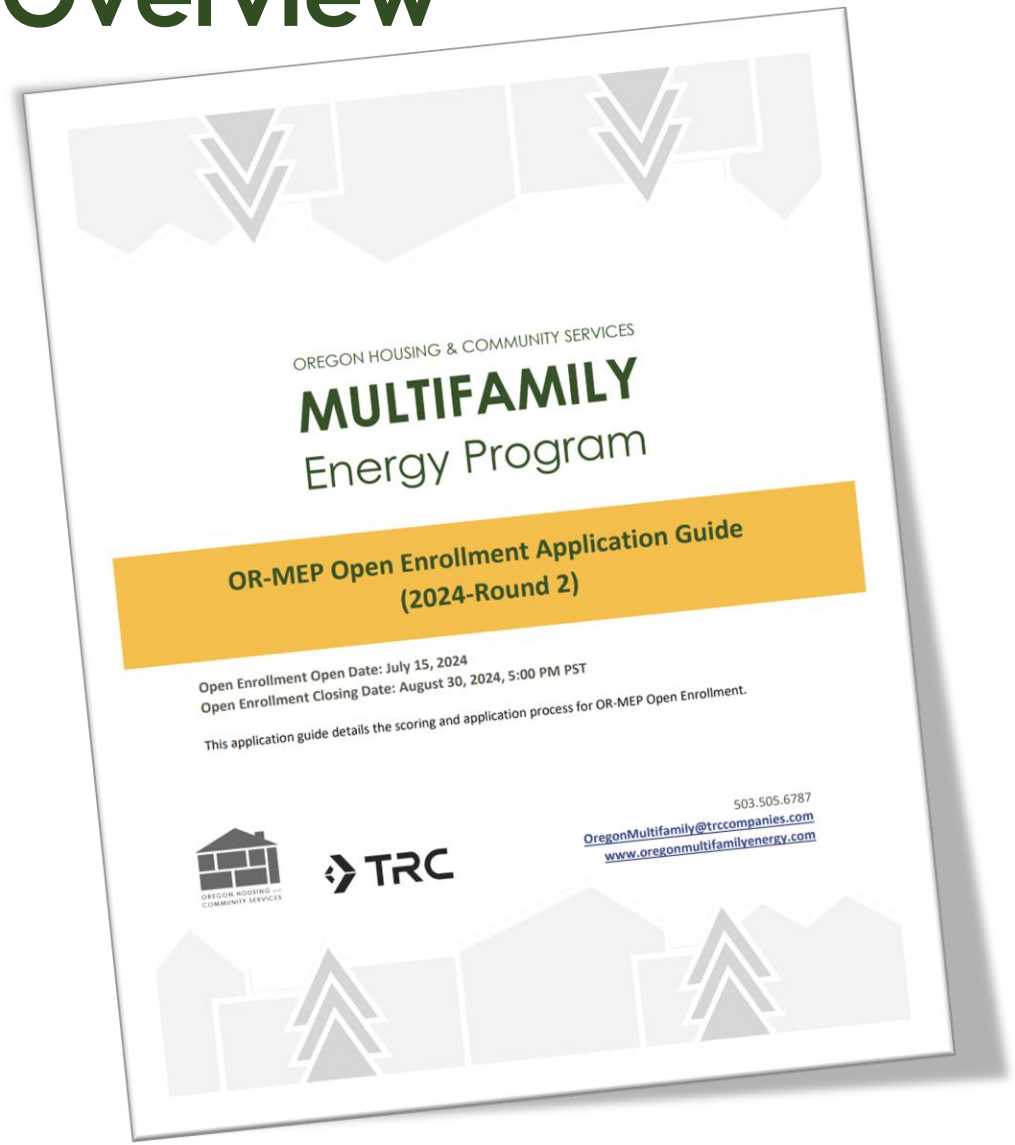


OR-MEP Open Enrollment Overview

- Open Enrollment process is a competitive application process with new DEI focused criteria to prioritize highest scoring projects for funding.
- Prioritization criteria co-created between Program Team & DEI Coalition.

Scoring Categories & Weighting

Category	Max Total Points	% of Points
BIPOC (Community + Residents)	10	27%
High Priority Area Index (Energy Burden)	5	14%
Location Relative to Available Resources (Rural)	10	27%
Naturally Occurring Affordable Housing (NOAH)	5	14%
Serving households with very low incomes.	5	14%
Non-profit/housing authority	2	5%
Total	**37**	**100%**



www.OregonMultifamilyEnergy.com/apply

OR-MEP Open Enrollment Funding Calendar

(2023-2027)

Open Enrollment Round	Date of Open Enrollment Release	Date of Open Enrollment Close	Funding Availability	Estimated Units to Serve
2023-R1 [COMPLETE]	July 12, 2023	August 28, 2023	$2,500,000	825 units
2024-R1 [COMPLETE]	Jan 15, 2024	Mar 1, 2024	$2,500,000	825 units
2024-R2	**Jul 15, 2024**	**Aug 30, 2024**	**$1,750,000**	**575 units**
2025-R1	Jan 15, 2025	Mar 1, 2025	$1,750,000	575 units
2025-R2	Jul 15, 2025	Aug 31, 2025	$1,300,000	425 units
2026-R1	Jan 15, 2026	Mar 1, 2026	$1,300,000	425 units
2026-R2	Jul 15, 2026	Aug 31, 2026	$1,300,000	425 units
2027-R1	Jan 15, 2027	Mar 1, 2027	$800,000	275 units
2027-R2	Jul 15, 2027	Aug 31, 2027	$800,000	275 units
		TOTAL	**$14,000,000**	**4,625 units**

Funding rounds every 6 months to ensure equitable distribution of funding for next five years.

Project Type / Utility	Pacific Power Service Area	Portland General Electric Service Area	Total
New Construction	$437,500	$437,500	**$875,000**
Existing Multifamily	$437,500	$437,500	**$875,000**
TOTAL	**$875,000**	**$875,000**	**$1,750,000**

2024-Round 2
Set Aside Categories

Should I Apply For OR-MEP Open Enrollment Funding 2024-Round 2?

OHCS anticipates releasing OR-MEP Open Enrollment rounds every 6 months.

We encourage project teams to apply for this round if your project meets the following prerequisites if selected for OR-MEP funding in this Open Enrollment round:

- ❑ Project will finalize development of the energy efficiency scope to **reserve incentives within 6 months of Open Enrollment selection.**
- ❑ Project will **start construction or upgrades within 18 months of Open Enrollment selection.**

***Note:** If your project is not yet ready to commit to these timelines or are awaiting confirmation of other funding sources to confidently move forward, we ask that you wait for the next OR-MEP Open Enrollment round to apply. We want to prioritize projects that are ready to move forward immediately after being selected, and projects with an uncertain viability to move forward takes away a spot from another project that could benefit from funding in this round. OHCS will enforce these deadlines for any project selected from this Open Enrollment round. Project teams that show a repeated pattern of not meeting deadlines or not making progress to move forward may be disqualified from participating in future OR-MEP Open Enrollment rounds.*

Criteria Updates Compared to Last Round

- **Rural and non-rural definition updated to use zip code lookup using rural/urban designation from OHSU Office of Rural Health – Rural and Frontier Data.** (www.ohsu.edu/oregon-office-of-rural-health/about-rural-and-frontier-data)

- **"Project is primarily serving BIPOC residents" criteria updated with the following two options depending on if project is located in a rural community. This update was made to address limited availability of BIPOC Culturally Specific Organizations in rural communities.**
  - **Option A: BIPOC Culturally Specific Organization option (available for all projects statewide)**: Projects that are owned, managed, or partnering with a BIPOC Culturally Specific Organization are an indicator of a BIPOC community being reflected as residents of an affordable multifamily rental property.
  - **Option B: BIPOC Culturally Responsive Organization option (available for projects located in rural communities)**: Projects that are owned or developed by BIPOC Culturally Responsive Organization (CRO) are an indicator of a BIPOC community being reflected as residents of an affordable multifamily rental property.
    - Note: The BIPOC CRO should be the same as the applicant organization. If there is a partnership among organizations as the applicant or if there is a different ownership/development arrangement like an LLC or LP, the CROs role should be explained in the application.

Due to updates, remember to submit applications using the 2024-R2 version of the application found on OR-MEP website. The application from the previous round (2024-R1) should not be used. Be sure to check the application you are using says "2024-R2" when you open the file.

Prioritization Criteria (Scored)

1. Project is in a BIPOC community. [0-5 points]

Score will be noted in Open Enrollment application based on project address provided. The data source is based on data found in Affordable Housing Assessment Map, "Ethnicity and Race – Census Tract – Percent of BIPOC" layer

- **Program Intent: The intent of this criteria is to prioritize projects located in BIPOC communities.**

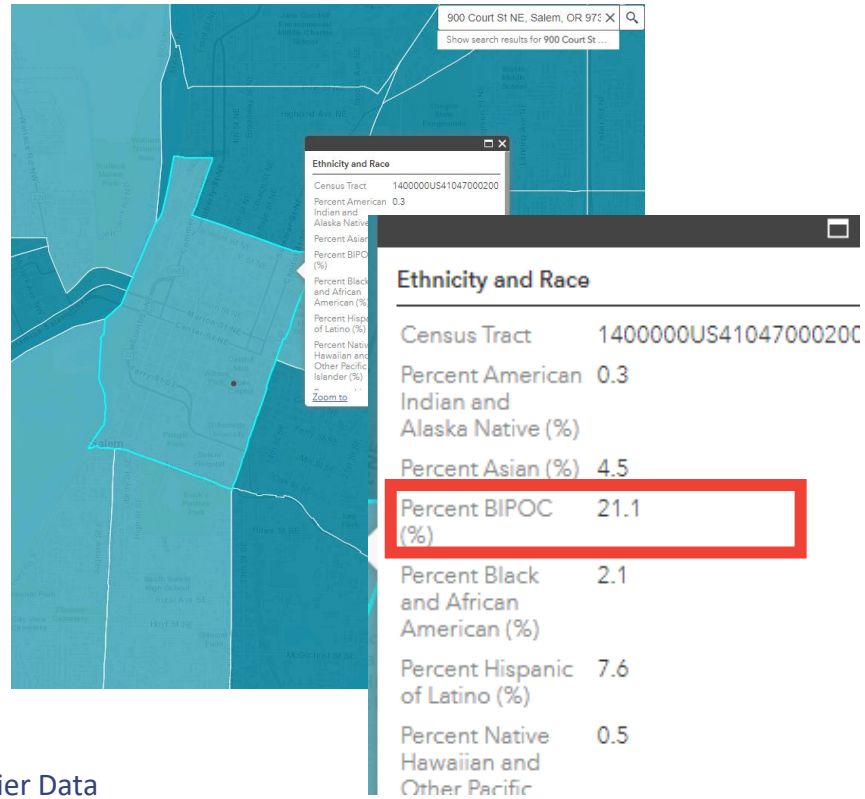
RURAL PROJECTS	# of Points
% BIPOC in Census Tract: <5%	0
% BIPOC in Census Tract: 5-12%	1
% BIPOC in Census Tract: 13-19%	3
% BIPOC in Census Tract: 20%+	5

NON-RURAL PROJECTS	# of Points
% BIPOC in Census Tract: <15%	0
% BIPOC in Census Tract: 15-29%	1
% BIPOC in Census Tract: 30-44%	3
% BIPOC in Census Tract: 45%+	5

Rural & Non-Rural: *based on zip code* using rural/urban designation from OHSU Office of Rural Health – Rural and Frontier Data

Example: 900 Court Street NE, Salem OR 97301

- Non-Rural, % BIPOC = 21.1%
- Project eligible for 1 point



Prioritization Criteria (Scored)

2. Project is primarily serving BIPOC communities. [0-5 points]

There are two options to qualify for this category.

- **Option A: BIPOC Culturally Specific Organization option (available for all projects statewide, 1-5pts)**: Projects that are owned, managed, or partnering with a BIPOC Culturally Specific Organization (CSO).

- **Option B: BIPOC Culturally Responsive Organization option (available for projects located in rural communities, 3 pts)**: Projects that are owned or developed by BIPOC Culturally Responsive Organization (CRO).
  - *Note: The BIPOC CRO should be the same as the applicant organization. If there is a partnership among organizations as the applicant or if there is a different ownership/development arrangement like an LLC or LP, the CROs role should be explained in the application.*

Program Intent: The intent of this criteria is to prioritize projects that are explicitly designed and located to address displacement of BIPOC residents and communities, and to ensure underserved BIPOC communities are represented as residents of property.

Prioritization Criteria (Scored)

2. Project is primarily serving BIPOC communities. [0-5 points]

The following definitions are important to review when considering if your project qualifies for this criteria.

BIPOC: Black, Indigenous, People of Color. BIPOC communities, or communities of color, are identity-based communities that hold a primary racial identity that describes the racial characteristics of the community that its members share (such as being African American) that supports self-definition by community members, and that typically denotes a shared history and current/historic experiences of racism. The community may or may not also be a geographic community. Given that race is a socially defined construct, the definitions of these communities are dynamic and evolve across time.

Culturally Specific Organization (CSO): A nonprofit organization designed to serve historically underserved communities least likely to apply for housing occupancy and that is:

- representative of a community or significant segments of a community;
- provides affordable housing to very low- and low-income households; and
- can demonstrate primary target populations served to be 'least likely to apply', meaning there is an identifiable presence of a specific demographic group in the housing market area, but members of that group are not likely to apply for the housing without targeted outreach, including marketing materials in other languages for limited English proficient individuals, and alternative formats for persons with disabilities. Reasons for not applying may include, but are not limited to, insufficient information about housing opportunities, language barriers, or transportation impediments.

Culturally Responsive Organization (CRO): An entity that comprehensively addresses power relationships throughout the organization, from the types of services it provides and how it maximizes language accessibility to its human resources practices-who it hires, how they are skilled, prepared and held accountable, to its cultural norms, its governance structures and policies, and its track record in addressing conflicts and dynamics of inclusion and exclusion, to its relationships with racial groups in the region, including its responsiveness to expectations. A Culturally Responsive Organization is one that is dynamic, on a committed path to improvement and one that is hardwired to be responsive to the interests of Communities of Color, service users of color and staff of color. Culturally responsive organizations hire and train culturally and linguistically diverse staff to meet the needs of the diverse communities they serve.

Prioritization Criteria (Scored)

Narrative responses that are blank, incomplete, or with insufficient detail will be scored 0 points by program staff.

2. Project is primarily serving BIPOC communities. [0-5 points]

Option A: BIPOC Culturally Specific Organization option (available for all projects statewide, 1-5pts): Projects that are owned, managed, or partnering with a BIPOC Culturally Specific Organization (CSO).

BIPOC Organization Level of Influence	# of Points	Supporting Questions
The project is not partnering with BIPOC Culturally Specific Organization.	0	N/A
The project is advertising and marketing the property in partnership with a BIPOC Culturally Specific Organization.	1	1) What is the name of the BIPOC Culturally Specific Organization? 2) Explain how the organization is effective in working with the BIPOC community in the project's region. *[Narrative, max 300 words]* *3)* ***[FOR 3 POINT OPTION ONLY]*** How is the BIPOC Culturally Specific Organization contributing to the design or operation of the project? [Checklist as follows]
The project is partnering with a BIPOC Culturally Specific Organization that: **(a) is contributing to the design to improve the property to better meet the unique needs and preferences of the community.** **OR** **(b) will provide culturally sensitive support for current or future residents on a permanent basis.**	3	
A BIPOC Culturally Specific Organization… • **is the sole or part owner of the property;** **OR** • **is currently (existing buildings) or will (new construction) manage the property.**	5	

Prioritization Criteria (Scored)

Narrative responses that are blank, incomplete, or with insufficient detail will be scored 0 points by program staff.

2. Project is primarily serving BIPOC communities. [0-5 points]

Option A: BIPOC Culturally Specific Organization option (available for all projects statewide, 1-5pts): Projects that are owned, managed, or partnering with a BIPOC Culturally Specific Organization (CSO).

BIPOC Organization Level of Influence	# of Points	Supporting Questions
The project is partnering with a BIPOC Culturally Specific Organization that: **(a) is contributing to the design to improve the property to better meet the unique needs and preferences of the community.** **OR** **(b) will provide culturally sensitive support for current or future residents on a permanent basis.**	3	***[FOR 3 POINT OPTION ONLY]*** **How is the BIPOC Culturally Specific Organization contributing to the design or operation of the project? [Checklist as follows]**

The BIPOC Culturally Specific Organization is currently or will be providing:

- ☐ Predevelopment outreach work, such as a survey and/or focus groups with current or potential future residents from the BIPOC community they serve.
- ☐ Resident placement services that connect BIPOC community members they serve to the property.
- ☐ Language and application support for prospective residents.
- ☐ Ongoing youth programs, such as childcare, tutoring, mentorship programs etc. at the property.
- ☐ Ongoing supportive services, such as language access services, physical and mental health services, home ownership support, financial literacy, education, cultural celebration etc.
- ☐ Cultural sensitivity training for the property staff.
- ☐ Other [text box for optional additional info]

Prioritization Criteria (Scored)

Narrative responses that are blank, incomplete, or with insufficient detail will be scored 0 points by program staff.

2. Project is primarily serving BIPOC communities. [0-5 points]

Option B: BIPOC Culturally Responsive Organization option (available for projects located in rural communities, 3 pts): Projects that are owned or developed by BIPOC Culturally Responsive Organization (CRO).

BIPOC Culturally Responsive Organization (CRO) – Supporting Questions	[3 points]
Part 1: CRO Identifying Activities **Organizations that meet the definition of a BIPOC Culturally Responsive Organization conduct many of the following activities. Please select the activities the organization applying for OR-MEP funds and identifying as a BIPOC CRO is currently doing:** ❑ **Recruits, retains, and promotes staff that reflect the cultural diversity of the community they want to serve.** ❑ **Provides staff with trainings around DEI and culturally and linguistically appropriate service delivery.** ❑ **Has leadership and/or board members that reflect the BIPOC communities they want to serve.** ❑ **Has a plan/strategy for serving BIPOC communities (e.g., Affirmative Fair Housing Plan or other plan).** ❑ **Participates in partnerships with community groups and/or other agencies that target diverse cultural groups.** ❑ **Offers written materials and intake forms in languages that target the groups they want to serve in their service area.** ❑ **Has staff or provides professional interpreter services, at no cost, to all potential residents with limited English.** ❑ **Collects reliable demographic information to evaluate its impact with the BIPOC Community.** ❑ **Other [text box for optional additional info]**	**Part 2: Supporting Questions** **Please respond to the following three (3) question on the applicant organization to establish it is a BIPOC Culturally Responsive Organization.** 1. **Organization Composition: At an organizational level, why is your organization well equipped to serve the needs of the BIPOC community? [Narrative, max 400 words]** 2. **Community Relationships & Trust: What existing community relationships and established trust with diverse cultural groups does your organization have to lead to BIPOC residents being reflected in the property applying for OR-MEP funds? [Narrative, max 400 words]** 3. **Community Outreach: What is your organization's community outreach plan for serving BIPOC communities? What will it look like if you are successful? [Narrative, max 400 words]**

Prioritization Criteria (Scored)

3. Project's High Priority Area Index Score (Energy Burden). [0-5 points]

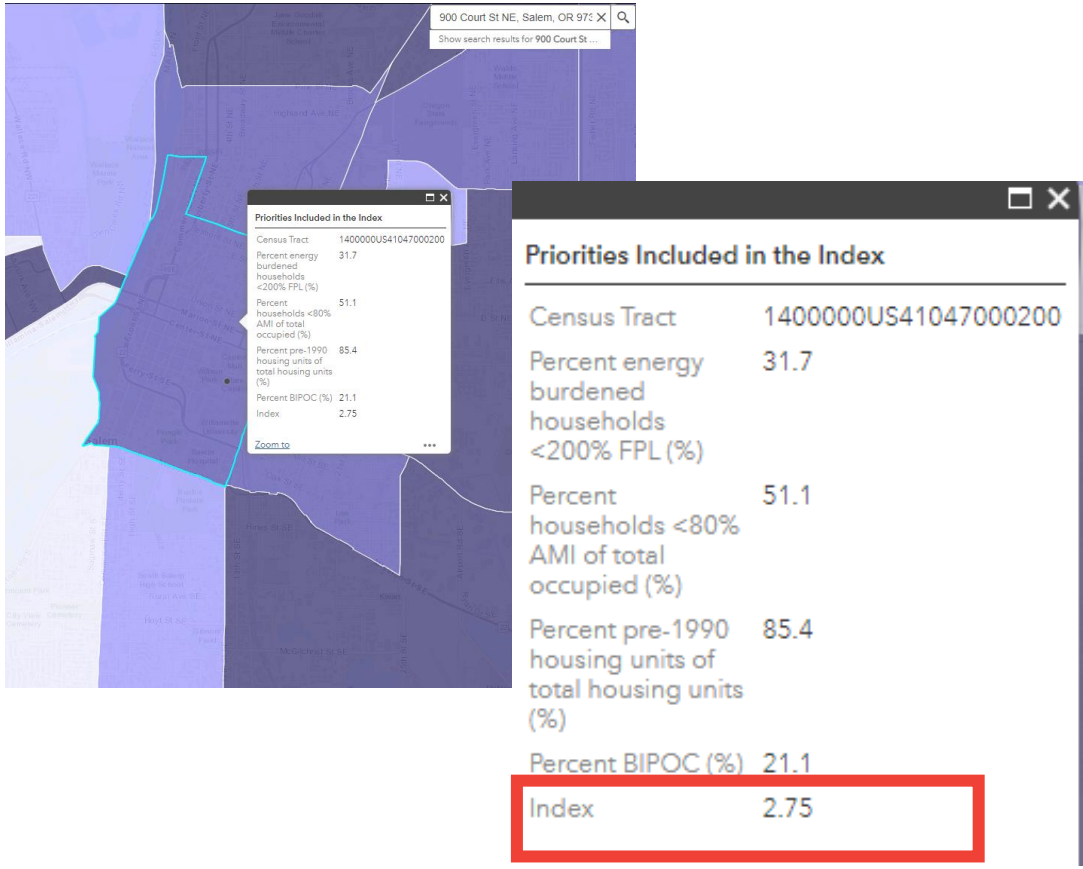
Score will be noted in Open Enrollment application based on project address provided. The data source is based on data found in Affordable Housing Assessment Map, "High Priority Area Index – Census Tract – Index" layer

- **Program Intent: The intent of this criteria is to prioritize projects with high priority area index score, which is a metric defined in the Ten Year Plan: Reducing the Energy Burden in Oregon Affordable Housing (p 17). This index was created to identify locations more easily in Oregon with the greatest energy burden. The index includes a measure of energy burden itself along with other factors that are known to drive energy burden, including: affordability hardship due to low household income (economic driver); poor home energy efficiency due to older home vintage (physical driver); and housing inequity issues due to ethnicity/race (systemic driver).**

	# of Points	% of Total Points
High Priority Index Score: <1	0	0%
High Priority Index Score: 1.00 – 1.99	1	3%
High Priority Index Score: 2.00 - 2.99	3	10%
High Priority Index Score: 3.00+	5	16%

Example: 900 Court Street NE, Salem OR 97301

- High Priority Area Index Score = 2.75
- Project eligible for 3 points



Prioritization Criteria (Scored)

4. Project Location Relative to Available Resources. [0-10 points]

Score will be noted in Open Enrollment application based on project address provided.

Program Intent: The intent of this criteria is to prioritize projects in locations that are currently underserved by OR-MEP, and due to their location away from urban centers the projects are typically resource constrained due high labor costs of energy upgrades tied to workforce shortages compared to projects located in populated urban areas.

Project Location Relative to Available Resources	# of Points
Portland	1
Urban* in Multnomah (Except Portland), Washington, Clackamas Counties	3
Urban* outside Multnomah, Washington, Clackamas Counties	5
Rural*	10

Example: 900 Court Street NE, Salem OR 97301

- Eligible Category = "Urban Outside of Multnomah, Washington, Clackamas Counties"
- Project eligible for 5 points

***Rural & Urban:** based on zip code* using rural/urban designation from OHSU Office of Rural Health – Rural and Frontier Data

***Note**: Project location must be in Portland General Electric or Pacific Power electric service area to meet OR-MEP eligibility requirements. This requirement supersedes rural and urban definitions above.*

Prioritization Criteria (Scored)

5. Project is Naturally Occurring Affordable Housing (NOAH). [0-5 points]

Is this property currently unsubsidized rental housing with no current or planned affordable regulatory agreement with a federal, state, or local agency? NOAH properties are unsubsidized rental housing that is affordable to residents with incomes between 60-120% of the area median income, and who typically can pay no more than 30% of their income on rent and utilities. NOAH property owners have typically never participated in affordable housing *programs (e.g, OHCS NOFAs, Housing Bureau NOFAs, LIHTC, HUD or USDA).*

To be eligible for OR-MEP incentives, applicant must agree to enter into a 10 year affordability agreement with OHCS. Learn more here: https://oregonmultifamilyenergy.com/wp-content/uploads/2020/09/OR-MEP_NOAH-Fact-Sheet_2020_09-08.pdf .

- **Program Intent: The intent of this criteria is to prioritize Natural Occurring Affordable Housing that are not currently subsidized and by enrolling in OR-MEP NOAH properties agree to meet OR-MEP affordability requirements by entering into a 10-year affordability agreement with OHCS, which will help preserve affordable housing in Oregon. NOAH properties typically have small teams that own and operate the property and need more support than a traditional affordable housing owner and developer to navigate and participate in an affordable housing program.**

	# of Points	% of Total Points
No	0	0%
Yes	5	16%

If you have a NOAH project, and need Open Enrollment Application support, please contact OR-MEP staff by email or phone.

Prioritization Criteria (Scored)

6. Project is serving households experiencing very low incomes. [0-5 points]

The project is serving households experiencing very low income. **Select the minimum affordability thresholds the project is serving.**

- **Program Intent: The OR-MEP affordability requirement is that at least 50% of units serve residents that are at or below 80% area median income (AMI) and units must remain affordable for at least 10 years. The intent of this criteria is to prioritize projects that will go beyond the affordability requirements of the program and will have more affordable units serving households experiencing very low income.**

Non-NOAH Projects

% of Affordable Units & Income Levels	# of Points
50% of units at or below 80% AMI	0
100%* of units at or below 60% AMI	1
100%* of units mix of 60% AMI and 30% AMI	3
100%* of units at or below 30% AMI	5

**Exclude units reserved for management or support staff.*

NOAH Projects

Average Rents**	# of Points
All average rents by unit size at or below 80% HUD Limit	1
All average rents by unit size at or below 60% HUD Limit	3
All average rents by unit size at or below 30% HUD Limit	5

***Average rents by unit size is a required input in application.*

Prioritization Criteria (Scored)

7. Applicant entity is a nonprofit or housing authority. [0-2 points]

To be eligible as a nonprofit, the applicant entity must be a recognized 501(c)(3) organization.

To be eligible as a housing authority, the applicant entity must be a housing authority associated with a government entity.

- Program Intent: The intent of this criteria is to prioritize nonprofits and housing authorities that are often more resources constrained than for-profit applicant entities.

	# of Points	% of Total Points
No	0	0%
Yes	2	6%

Application Submission Process

Enrollment Timeline

Enrollment Stage	Date
OR-MEP Open Enrollment - 2024 Round 2 Opens	Monday, July 15, 2024
OR-MEP Open Enrollment - 2024 Round 2 Closes	Friday, August 30, 2024, 5:00pm PST
Notice of Selected Projects Issued for OR-MEP Open Enrollment – 2024 Round 2	By Tuesday, October 1, 2024

These dates may be subject to change at the discretion of OHCS.

Applications must be submitted no later than Friday, August 30, 2024 at 5:00 PM PST.

Any application submitted after this time will not be evaluated. Completed Open Enrollment Applications should be submitted via email to: OHCSMultifamilyEnergy@trccompanies.com

Program staff will confirm receipt of application within two (2) business days. If you do not receive this confirmation, please contact us at: 503-505-6787.

Application Review Process

Enrollment Timeline

Enrollment Stage	Date
OR-MEP Open Enrollment - 2024 Round 2 Opens	Monday, July 15, 2024
OR-MEP Open Enrollment - 2024 Round 2 Closes	Friday, August 30, 2024, 5:00pm PST
Notice of Selected Projects Issued for OR-MEP Open Enrollment – 2024 Round 2	By Tuesday, October 1, 2024

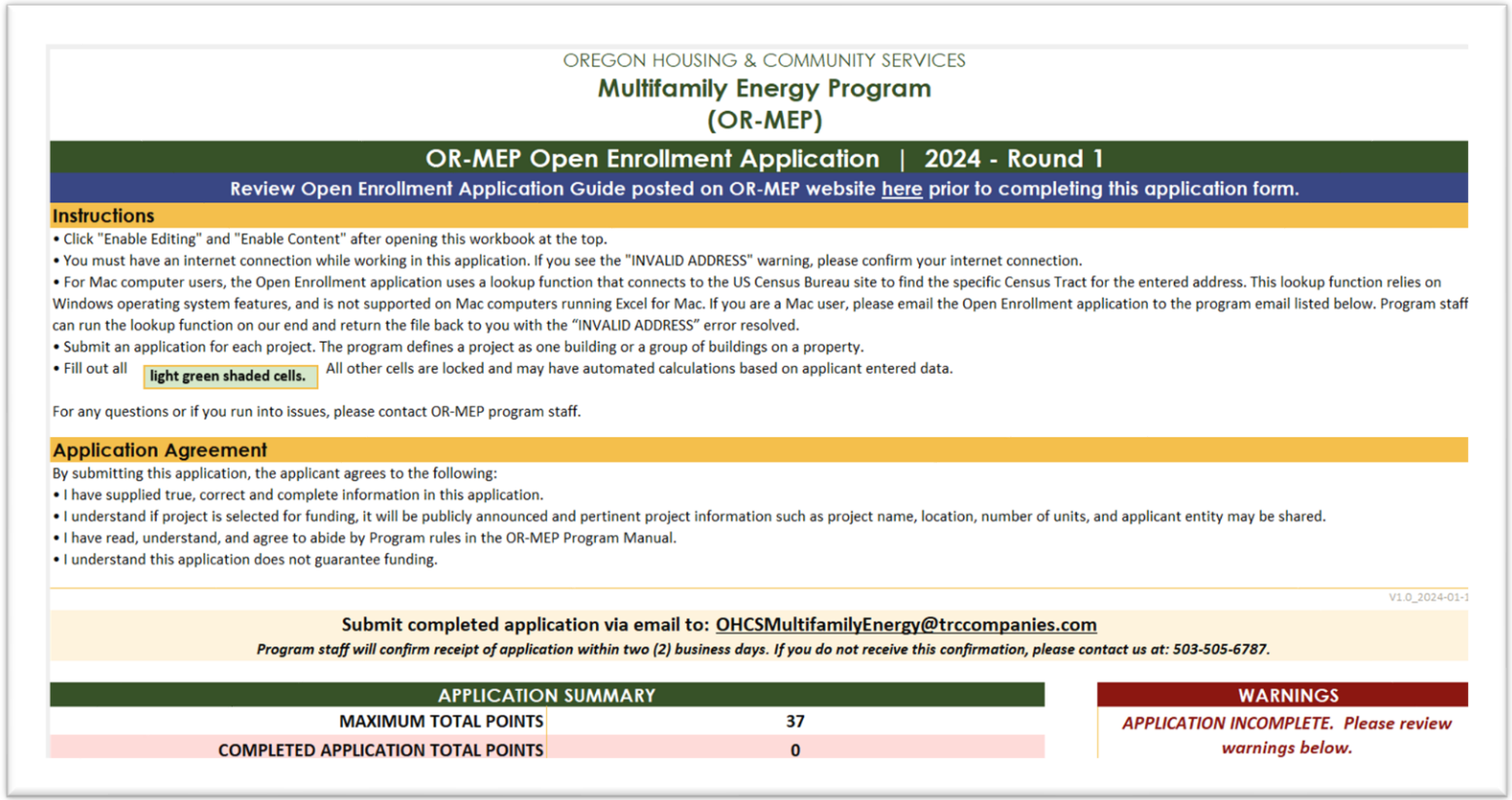
These dates may be subject to change at the discretion of OHCS.

Application Review Process

- **Applications in response to this Open Enrollment are reviewed and competitively ranked in accordance with the following:**
  - Complete application submission
  - Receive an overall score (for Scored Criteria),
  - Ranked highest to lowest by score in the appropriate set-aide.

  Applications that have the highest scores within each set-aside category will be recommended for funding as allocated resources allow.
- **OR-MEP anticipates issuing notice of selected projects within 30 days of enrollment round closing.**

LIVE DEMO OF OPEN ENROLLMENT APPLICATION



OREGON HOUSING & COMMUNITY SERVICES

Multifamily Energy Program
(OR-MEP)

OR-MEP Open Enrollment Application | 2024 - Round 1

Review Open Enrollment Application Guide posted on OR-MEP website here prior to completing this application form.

Instructions

- Click "Enable Editing" and "Enable Content" after opening this workbook at the top.
- You must have an internet connection while working in this application. If you see the "INVALID ADDRESS" warning, please confirm your internet connection.
- For Mac computer users, the Open Enrollment application uses a lookup function that connects to the US Census Bureau site to find the specific Census Tract for the entered address. This lookup function relies on Windows operating system features, and is not supported on Mac computers running Excel for Mac. If you are a Mac user, please email the Open Enrollment application to the program email listed below. Program staff can run the lookup function on our end and return the file back to you with the "INVALID ADDRESS" error resolved.
- Submit an application for each project. The program defines a project as one building or a group of buildings on a property.
- Fill out all **light green shaded cells.** All other cells are locked and may have automated calculations based on applicant entered data.

For any questions or if you run into issues, please contact OR-MEP program staff.

Application Agreement

By submitting this application, the applicant agrees to the following:

- I have supplied true, correct and complete information in this application.
- I understand if project is selected for funding, it will be publicly announced and pertinent project information such as project name, location, number of units, and applicant entity may be shared.
- I have read, understand, and agree to abide by Program rules in the OR-MEP Program Manual.
- I understand this application does not guarantee funding.

V1.0_2024-01-1

Submit completed application via email to: OHCSMultifamilyEnergy@trccompanies.com

Program staff will confirm receipt of application within two (2) business days. If you do not receive this confirmation, please contact us at: 503-505-6787.

APPLICATION SUMMARY	
MAXIMUM TOTAL POINTS	37
COMPLETED APPLICATION TOTAL POINTS	0

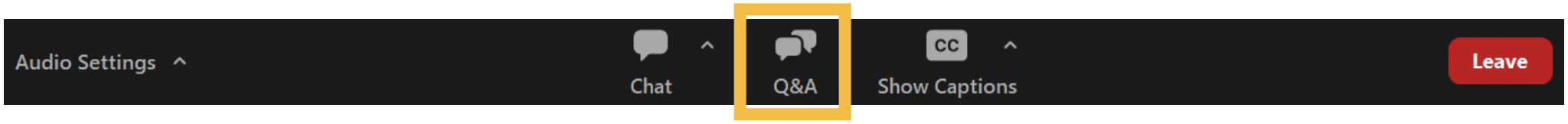
WARNINGS

APPLICATION INCOMPLETE. Please review warnings below.

Follow along at:
https://oregonmultifamilyenergy.com/apply/

Q&A?

- Please type questions via Q&A button.



THANK YOU!

Oregon Multifamily Energy Program

www.OregonMultifamilyEnergy.com

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