

Eastern Oregon Border Economic Development Board Program Handbook

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Introduction

The Eastern Oregon Border Economic Development Region (Region) and the Eastern Oregon Border Economic Development Board (Board) and Eastern Oregon Border Board Fund (Fund) were established by the Oregon Legislature in 2017 through HB 2012. The Region is established to promote workforce development, create or retain jobs, expand business and promote economic development within the Oregon communities bordering Idaho. The Board and Oregon Business Development Department (dba Business Oregon), collaboratively worked to formulate and implement strategies for the \$5 million legislative appropriation to invest in workforce and economic development in the Region. Oregon Community Foundation is the third-party administrator of the Board's programs.

The Region consists of the following areas: within 20 miles of the Oregon border with the State of Idaho, including but not limited to Ontario, Vale and Nyssa; an area in Oregon that is across the Oregon border from Weiser, Idaho; an area southwest of Vale for a distance of 10 miles; and Willow Creek and Brogan. The map outlining the boundary of the Border Region can be found at www.eoborderboard.org.

The purpose of these guidelines is to provide applicants and staff with a concise, easy to use reference for the Fund programs. The content is organized into two sections, Program Information and Process. The information included is as specific as possible, however it is difficult to foresee and address the variety of project circumstances that exist in the Region. We are available to answer questions, provide technical assistance and overall project assistance.

This program guidance document is based on legislative statutes, administrative rules, and board policy and is subject to periodic revisions to meet evolving economic development needs or to advance the priorities for program funding. While the Board and the program administrator will do its best to provide revisions to this guidance as they occur, should a discrepancy be found between this document and legislative statute, administrative rule and/or department/programmatic policy, those authoritative documents will override the program guidance document.

Suggestions and comments regarding the program guidelines are always welcome. Please direct suggestions to:

Eastern Oregon Border Economic Development Board
PO Box 218
Ontario, OR 97914

Program Information

Purpose

The Eastern Oregon Border Board Fund (Fund) program was established by the Legislature in 2017 to provide funding for the Eastern Oregon Border Economic Development Region (Region) to support workforce and economic development in the Region. The purpose of the program is to provide loan or grant funding to eligible applicants within the Region through multiple funding opportunities to enhance economic vitality and opportunity in the Region.

Governing Rules and Statutes

This Handbook is provided to give applicants guidance on project eligibility, project development, how to apply for funds, and how to administer projects financed by the program.

Current Oregon Revised Statutes (ORS) applicable to the Eastern Oregon Border Board program can be found in ORS 284.771 to 284.801. Current Administrative Rules can be found in OAR 124, Division 1, Division 5 and Division 10.

Eligible Applicants

An eligible applicant includes but is not limited to:

- Local governments;
- Institutions of higher education as defined in ORS 348.582;
- Private or nonprofit businesses with their principal places of business or the majority of their workforces located in the Region;
- Small business development centers established under ORS 285B.165 to 285B.171;
- Economic development organizations;
- School districts; and
- Private persons and public, private, and nonprofit entities promoting housing, workforce, or economic development within the Region.

NOTE: *Not all applicants will be eligible for specific programs. For example, the Infrastructure Revolving Loan Program is only available to local governments and/or developers. Applicants can have only one open grant at a time.*

Eligible Projects and Activities

Eligible activities must **significantly impact education, workforce and/or economic development capacity in the Region**. Priority will be given to programs and projects that:

- Enhance prosperity in the Region.
- Improve the Region's property tax base.
- Improve the Region's economic competitiveness.
- Increase workforce availability and skills in the Region.
- Leverage the funds with a complement of outside funding.
- Improve the image of the Region.

Ineligible Projects and Activities

In addition to the requirements of each specific Program, there are general restrictions on use of the Border Fund for purposes disallowed under state or federal law. The Border Fund may also not be used for:

- The retirement or service of debt for any public or private entity;
- Expenses incurred prior to the date of award by the Board unless otherwise approved by the Board;
- Employee salaries or payroll expenses, unless specifically approved by the Board; and
- Absent federal legislation or regulations permitting the same, any project involving cannabis, hemp, or associated derivatives or extracts.

Opportunities to achieve the board's priorities are through various funding opportunities.

Process

High-level Application Process



Quick overview

Solicitation or notice of open application rounds will be posted at www.eoborderboard.org and through other local media. Solicitation will provide information on the available programs, when applications will be due and location where applications can be obtained.

Upon close of an application round, applications will be reviewed for completeness. For loan programs, applications will be underwritten by the lending partner in accordance with its loan policies. Upon loan approval, recommendations will be provided to the board for consideration and potential approval.

Complete applications will be scored competitively within each specific program and in accordance with the scoring criteria. Award decisions will be made by the board.

The grant or loan recipient will be notified, in writing, of award. The program administrator will complete the contract request and provide the recipient with the proper contractual document(s) for signature. Upon fully executed contract agreement, recipient may proceed with project in accordance to the approved scope of work.

Grant and loan recipients will be responsible for reporting to the board according to the terms of their specific contractual agreement. Projects will be finalized and closed out according to their terms.

Application Information

As noted above, open application rounds will be properly publicized. Applications will be accepted for the specific programs as published. Once an application round is closed, applications will not be accepted – no exceptions.

To ensure the application is as competitive as possible, please be sure to thoroughly and completely answer all questions and provide the requested documentation. For loan programs, documentation may include financial statements, authorization to request/review credit reports of the borrower(s), tax documents, etc. For programs where construction is part of the project, contractor's bids, design documents, building permits, certificates of occupancy, tax receipts, etc. may be required. All requested information should be provided with the application or the application may be denied.

Should there be questions or guidance needed on a specific application, the request must be submitted in writing at least two weeks prior to an application deadline to ensure adequate time for a response from the Eastern Oregon Border Board. Applications received after the application deadline will not be considered.

E-mail address:

eoborderboard@gmail.com

Mailing address:

Eastern Oregon Border Economic Development Board
ATTN: Emily Conlon
PO Box 218
Ontario, Oregon 97914

Application information is available at www.eoborderboard.org.

Remedies

Border Board financing is documented by a contract, loan or grant agreement (contract) executed by the applicant and the program administrator. This contract details the terms and conditions under which financial assistance is provided. In the event an applicant fails to comply with these terms and conditions, the program administrator may seek appropriate legal remedies.

Border Fund Programs

The Border Board has developed several programs that are expected to enhance and expand workforce development and economic development in the Region. The following information provides an overview of each of the programs.

NOTE: *Application deadlines have been set by the Board and may be subject to change. Please check www.eoborderboard.org or contact the Border Board at eoborderboard@gmail.com to confirm application deadlines for the various programs.*

Incentive Programs

1. Competitive Housing Incentive Program

Purpose – provide an incentive to build new homes in the Region.

Applicants should consult with their tax advisor concerning the effect, if any, participation in this program has on his or her tax basis, available deductions, or other tax matters personal to your situation.

Program Overview:

- New construction of an owner-occupied home within participating jurisdictions in the Region. Eligible structures include stick built, single family homes on a foundation. Also eligible are townhouses, duplexes and multiplexes provided at least one unit is owner occupied. Manufactured homes are not eligible.
- Tax assessed value of the home at completion must be at least \$175,000. Pending tax assessment, the value of the home at completion may be established by tax assessment, appraisal, evidence of cost to build, or other documentation satisfactory to the Board.
- Property taxes for the subject property must be current at the time of application and remain so during the duration of the program. Upon completion of home construction, as evidenced by receipt of a Certificate of Occupancy, closing at a title company, or other documentation satisfactory to the Board, the homeowner can follow the application process to request a \$6,000 incentive from the Board. Applications can be submitted at any time once the necessary documentation is available but no more than 30 days *after* eligibility accrues as described above.
- On a yearly basis thereafter, a homeowner that qualified for the initial incentive described above can submit a re-application and a receipt to the Board showing property taxes for the subject property have been paid in full. Re-applications must be submitted by December 1st of the current tax year to be eligible. Upon approval of the Board, the homeowner will be reimbursed up to \$1,500 per year for up to 10 consecutive years.
- The Malheur County Tax Assessor's office will remit replenishment to the Board or its designee in accordance with the terms and conditions outlined in the Intergovernmental Agreement (IGA).
- Incentives are not transferrable. Only the original applicant homeowner still occupying the qualifying property may apply for the ongoing annual incentive.
- Applications will be accepted on an open application cycle pending funding availability.
- Homeowner will be required to enter into an agreement outlining the program parameters.
- A property is only eligible to participate in one incentive program of the Board. Programs may not be overlapped and the Board will not approve a property for duplicate programs.

2. Property Improvement Rebate Program

Purpose – improvements to existing residential, commercial or industrial properties and new development of multi-family residential, commercial and industrial properties within the Region to encourage workforce housing and/or economic development.

Applicants should consult with their tax advisor concerning the effect, if any, participation in this program has on his or her tax basis, available deductions, or other tax matters specific to your situation.

Program Overview:

- Grant of the lesser of \$20,000 or 15% of the increased tax value.
- Repairs/improvements must increase the property's tax assessed value by at least \$10,000.
- Building permits are required. Property taxes must be current at the time of application and remain current throughout out the 10-year reimbursement period pursuant to the Intergovernmental Agreement (IGA) providing therefore.
- Eligible activities include but are not limited to façade improvements, structural repairs, major remodels and new development of multi-family residential, commercial or industrial properties within the Region.
- On a yearly basis, the Malheur County Tax Assessor's office will remit payment to the Board or its designee in accordance with the terms and conditions outlined in the Intergovernmental Agreement. The funds will be placed into the Fund to repay the initial incentive provided to the owner.
- Incentives are not transferrable.
- Applications will be accepted on an open application cycle pending funding availability.
- A property is only eligible to participate in one incentive program of the Board. Programs may not be overlapped and the Board will not approve a property for duplicate programs.

Loan Programs

1. Infrastructure Revolving Loan Program

Purpose – attract new residential, commercial or industrial development in the Region.

Program Overview:

- Loans within the Region for infrastructure investments such as roads, water, wastewater, utilities, etc.
- Eligible applicants are local governments and/or developers (as defined in ORS 701.005) within the Region.
- Maximum loan amount is the lesser of \$250,000 or 25% of eligible project cost.
- Interest rate is 1% with a maturity not to exceed five (5) years, or as otherwise set forth in the loan agreement.
- Repayment of the loan will be upon the sooner of lots sold/transferred for the first time on a pro-rata basis (if only a portion of the lots are sold/transferred) or at loan maturity.
- Loans must close through a title/escrow company to ensure proper recording of loan documents.
- Loan will be underwritten by the lending partner in accordance with its loan policies

- Funds will be disbursed in accordance with the terms of the loan agreement.
- Other funds needed to complete the project must be committed and available to the project to ensure the project can be completed in a timely manner.
- Applications will be accepted on an open application cycle pending funding availability.
- The foregoing are subject to modification by the Board in consultation with the lending partner.

2. Industrial Land Certification Loan Program

Purpose – to allow private land owners the ability to complete certification or recertify industrial land development. The program is based on the Oregon Certified Shovel Ready Industrial Lands guidelines.

Program Overview:

- Loan up to \$50,000 to private landowner within the Region.
- Upon receipt of site certification, funds will be released to the landowner. Invoices, receipts, and/or documentation must be submitted to the Board or its designee to receive reimbursement.
- Terms are interest at 1% payable upon the sooner of: first sale of certified property (pro-rata if more than one parcel/lot); when construction financing rolls to permanent (if applicant is developing land for own business use; or 6 years from loan disbursement.
- Loan will be underwritten by the lending partner in accordance to its loan policies.
- Applications will be accepted on an open application cycle pending funding availability.
- The foregoing are subject to modification by the Board in consultation with the lending partner.

3. Housing Rehabilitation Loan Program

Purpose – improvements to residential properties within the Region to improve external aesthetics.

Program Overview:

- Loan to property owners within the urban growth boundary and/or city limits in the Region. Includes single and multi-family residential.
- Maximum loan per property is \$15,000.
- Terms are 0% with a 5-year maturity.
- Loan applications will be underwritten by the lending partner accordance to its loan policies.
- Eligible activities include but are not limited to fences, painting, window repair/replacement, landscaping, and façade improvements. Activities are limited to external improvements only.
- If the proposed activity requires a specific license (roofing, electrical, etc.), the contractor must be properly licensed.
- If required, permits must be obtained.
- Applicants must submit a budget, improvement plans, contractor bids (multiple bids if possible), to ensure project can be completed.
- Funds will be provided on a reimbursement basis. With executed contract between homeowner and contractor, up to 50% of the loan request can be provided to the contractor to allow work to begin.
- Applications will be accepted on an open application cycle pending funding availability.

Grant Programs

1. Education & Workforce Training Grant

Purpose – to provide grants to education service providers to provide educational programs, equipment or facility upgrades specifically for workforce training.

Program Overview:

- Eligible applicants are local educational service providers within the Region. Local educational service providers are defined as establishments that provide instruction and training in a wide variety of subjects including, but not limited to, middle schools, high schools, colleges, universities, technical and trade schools, education service districts and training centers.
- Establishments may be privately owned and operated for profit or not for profit or publicly owned and operated.
- Maximum grant is \$100,000 per project.
- Funds may be used for programs, equipment, and/or facility upgrades for workforce training.
- A one-to-one is required; in-kind matches are not countable toward this requirement. Matching funds must be identified with the application and available prior to the first draw of funds but no more than 45 days after an award is made. Documentation must be provided.
- Letters of support from the industry for which the training would target must be provided with the application. The purpose is to reflect need for the training, equipment or facility upgrade.
- Funds must be used for direct costs in accordance with the approved scope of work; indirect costs are not eligible.
- Applications will be accepted on an annual basis pending funding availability.

2. Community Improvement Planning Grant

Purpose – to provide planning grants within the Region to local government for community improvement including but not limited to master plans, transportation plans, airports, parks, etc.

Program Overview:

- Grants can be used as a match with local, state, federal planning funds, feasibility studies, preliminary engineering, and initial cost estimates.
- Maximum grant for one entity is \$100,000 for all projects of that entity.
- Preference will be given to projects that can leverage the most amount of funds. Matching funds must be identified with the application and available prior to the first draw of funds but no more than 45 days after an award is made. Documentation must be provided with the application.
- Applications will be accepted on a semi-annual basis pending funding availability.

3. Scott Fairley Memorial Edge Grant

Purpose – to enhance economic vitality and opportunity by way of innovative and creative solutions in the Region. Proposed projects should focus on the overall objective of the Board and Fund to support workforce and economic development in the Region.

Program Overview:

- Eligible applicants include all residents, landowners, schools, businesses, local governments, nonprofits and community groups within the Region.
- Maximum grant is \$25,000.
- Preference will be given to applications with matching funds. Matching funds must be identified with the application and available prior to the first draw of funds but no more than 45 days after an award is made. Documentation must be provided.
- Grant recipient must provide, at a minimum, a final report to the Board on the outcome of the project, its success and how it achieved the objective to support workforce and economic development in the Region.
- Applications will be accepted on at least an annual basis pending funding availability.

4. Ready Workforce Mobilization Grant

Purpose – to provide grant funding to purchase equipment, facility upgrades, start-up costs, expansion or other products and services necessary to mobilize a workforce around housing, childcare, transportation and accessibility.

Program Overview:

- Eligible applicants are businesses, non-profit organizations, local governments and education service providers located in the Region.
- Maximum grant is \$100,000 per project.
- One to one matching funds are required; exclusive of in-kind match. Matching funds must be identified with the application and available prior to the first draw of funds but no more than 45 days after an award is made. Documentation must be provided.
- Grant may only be used for direct costs; indirect costs are not eligible and may not be applied toward the matching fund requirement.
- Preference will be given to applicants who can prove sustainability of the proposed project. Evidence of sustainability may include but is not limited to review of financial statements, business plans, etc.
- Preference will be given to projects targeting current or potential employees living and working or living and attending school full time in the Region.
- Applications will be accepted on an annual basis pending funding availability.

Other Programs

1. Board Strategic Fund

Purpose – to further the work of the Board in enhancing workforce and economic development in the Border Region.

Program Overview:

- Eligible applicants include governmental entities, businesses, nonprofits and community groups within the Region.
- Maximum award is \$1,000,000 and may be in the form of a grant, loan or a combination of both.
- Preference will be given to applications with matching funds and/or leveraged funds from other sources.
- Letters of support from stakeholders must be provided with the application. The purpose is to demonstrate need and sustainability.
- Recipients must commit to ongoing reporting as determined by the Board and made a part and condition of funding approval.
- Funds must be used for direct costs in accordance with the approved scope of work; indirect costs are not eligible.
- Applications accepted on an ongoing basis pending funding availability.
- Projects also may be developed and funded through the Board Strategic Fund on the Board's own initiative.