



# community alliance of tenants

CAT Board Agenda  
COMMUNITY ALLIANCE OF TENANTS (CAT)  
Monday, January 22, 2024  
6:00 PM - 8:00 PM

6:00 Welcome

Board introductions. check-ins and staff introductions

\*Board role: Agenda approval, ground rules review, approval of December minutes.

6:10 CAT Staff Reports

\*Board Role: Listen and ask questions

6:15 Finance Report

\*Board Role: Motion to approve the Finance Committee report. Motion to assign officers with loan signing and other banking authority.

6:25 CAT Program reports hotline, administration, and tenant engagement. CAT Personnel Handbook

Board Role: Listen, discussion

6:30 Finance Report:

Understand the update on CAT's financial issues including fundraising and timing of future resources. Also, understand what programming is possible until funds are increased. Hear possible cost containment and stabilization actions.

\*Board role: Questions. Make a motion to transfer of funds and other recommendations by the Finance Committee.

7:00 Break

7:05 Policy Report: In December the board voted to approve the Stable Homes for Oregon Families policy. In 2023 the CAT Board endorsed the 1000 Friends letter What We Need to Build More Housing.

\*Board Role: Make an additional motion to support or oppose requested endorsements for HB 2699, LC 19, and LC 178, Fair Shot Budget, and Housing Alliance proposals. Summaries are included in the packet.

- HB 2699- Sponsored by Representative Gamba Provides minimum wage rate beginning July 1, 2024. Link Oregon's minimum wage to the average rent for a one-bedroom apartment in a given region so that no full-time worker must spend more than 30% of their income on housing costs.
- LC 178- Allows Cities to impose Rent Control.
- LC 19 Land Use Adjustments, Urban Growth Boundary expansions, and appropriations for housing production including Middle-Income Housing

7:30 Plan for participation in the Housing Alliance Housing Opportunity Day on February 8<sup>th</sup> at the State Capitol.

7:40 Public comment and new business

Board role: Get information and ask questions

8:00 – Adjourn

\*These are action items



Agenda de la Junta CAT  
ALIANZA COMUNITARIA DE INQUILINOS (CAT)  
lunes, 22 de enero de 2024  
6:00 p.m. - 8:00 p.m.

6:00 Bienvenida

Presentaciones de la junta. registros y presentaciones del personal

\*Función de la junta directiva: aprobación de la agenda, revisión de las reglas básicas, aprobación de las actas de diciembre.

6:10 Informes del personal del CAT

\*Función de la junta directiva: escuchar y hacer preguntas

6:15 Informe financiero

\*Función de la Junta: Moción para aprobar el informe del Comité de Finanzas. Moción para asignar funcionarios con la firma de préstamos y otras autoridades bancarias.

6:25 El programa CAT informa sobre la línea directa, la administración y la participación de los inquilinos. Manual del personal CAT  
Función de la junta directiva: escuchar, discutir

6:30 Informe financiero:

Comprenda la actualización sobre los problemas financieros del CAT, incluida la recaudación de fondos y el calendario de recursos futuros. Además, comprenda qué programación es posible hasta que se aumenten los fondos. Conocer posibles acciones de contención y estabilización de costes.

\*Rol de la junta directiva: Preguntas. Hacer una moción para la transferencia de fondos y otras recomendaciones por parte del Comité de Finanzas.

7:00 Descanso

7:05 Informe de política: En diciembre, la junta votó para aprobar la política de Hogares estables para familias de Oregón. En 2023, la Junta del CAT respaldó la carta de 1000 Amigos: Lo que necesitamos para construir más viviendas.

\*Función de la Junta: Hacer una moción adicional para apoyar o oponerse a los respaldos solicitados para las propuestas HB 2699, LC 19 y LC 178, Fair Shot Budget y Housing Alliance. Los resúmenes están incluidos en el paquete.

- HB 2699: Patrocinado por el Representante Gamba Proporciona una tasa de salario mínimo a partir del 1 de julio de 2024. Vincula el salario mínimo de Oregón al alquiler promedio de un apartamento de una habitación en una región determinada para que ningún trabajador de tiempo completo deba gastar más del 30% de sus ingresos a los gastos de vivienda.

- LC 178- Permite a las ciudades imponer control de alquileres.

- LC 19 Ajustes en el uso de la tierra, expansiones de los límites del crecimiento urbano y asignaciones para la producción de viviendas, incluidas viviendas para personas de ingresos medios.

7:30 Plan de participación en el Día de Oportunidades de Vivienda de Housing Alliance el 8 de febrero en el Capitolio del Estado.

7:40 Comentarios públicos y nuevos negocios.

Función de la junta directiva: obtener información y hacer preguntas

8:00 – Clausura

\*Estos son elementos de acción

## CAT Board Meeting Notes December 18, 2023

6:00 pm Check in

Board Present: Jackie McGee, Amanda Caffall, Musonda Mwango (quorum)

Board Excused: Alex Rhodes

Staff and contractors present: Dung Ho, Kim McCarty, Matthew Edmonds, Tracy Baird, Jennifer De La Mancha

6:00 Welcome

Motion to that assigned following board member roles. By email Alex seconded Amanda's October 6<sup>th</sup> motion to adopt the board-nominated slate of CAT officers.

\* In this meeting December 18, 2023, the board unanimously reaffirmed the email vote to accept the following slate of CAT Board officers.

- Alex Rhodes President,
- Musonda Mwango, Vice-President,
- Delfina Andrade Secretary
- Amanda Caffall Treasurer

\* Board voted unanimously to affirm Kim McCarty, Executive Director, as the employee with administrative oversight and control of the Paragon account Paragon, Quickbooks, Abila and all financial applications at CAT.

\*The board motion to voted unanimously to the process of making board decisions by conference calls, electronic communications such as email and virtual meetings.

In the case of email votes, as a matter of process the board will all a Motion and the Second the same day but the final vote should not be affirmed until 24 hours after the 2<sup>nd</sup> unless the vote is unanimous.

6:25 Kim and Dung gave the CAT Program reports about the hotline, administration, and tenant engagement. At the next meeting staff will try to put the program reports into slides.

- 25 people Salem in person Micronesian Chukese
- Referrals to TPT
- Vietnamese live stream
- SEI family group

Community Engagement

- Lobby Day February 8<sup>th</sup>

6:30 Tracy gave the Finance Report The board asked questions and no revisions were requested. 13 FTE were eliminated at CAT. CAT needs unrestricted funds. There is a communications budget.

7:00 Break

7:05 Policy Report: Stable Homes for Oregon Families, Fair Shot and Housing Alliance proposals.

\*The board voted to unanimously endorse the Stable Homes for Oregon Families budget ask proposal listed below.

- Rent Stabilization rent assistance-\$45 million
- Affordable Housing Tenant engagement \$2 million
- Urban League \$10 million
- Oregon Worker Relief \$6 million

7:30 The new board applicant Betty Holladay was interviewed. Betty shared that she has been a Renter whole life and a part of the renters rights movement since 2017. Part of PTU. Lobbying with SEIU . Had problems with rent. Has some board of director experience. Wants to help CAT.

For new business Kim announced **Board Bright: Governance Roles & Responsibilities (Virtual)** February 1, 3 – 4:30 p.m. | Presenter: Tim Rusk, *NAO*

In this 90-minute webinar, participants will learn about the fundamentals of nonprofit governance and gain an understanding of the board's role in the management of the organization. This webinar is part of NAO's Board Bright Series – a quarterly board training designed for emerging and seasoned board members alike, and anyone else looking for a governance refresh. Free to NAO members! More details and registration information [here](#).

7:35 A closed meeting for discussion of electing a new board member and staffing decisions was held.

\*The CAT board unanimously voted to appoint Betty Holladay to the CAT board effective December 18, 2023.

7:49 – Adjourn

\*These are action items

## December 2023 Board Blurp

### Hotline

In the month of December, we completed 121 hotline calls across the state and completed 8 Live calls. The top calls were about repairs and deposits.

- There was one event in December. Sat. 12/16 5:30-8pm. Tabling for a Coalición Fortaleza community event at Talent Community Center in Southern Oregon. Jennifer attended. There were about 200 people in attendance.

### **Hiring**

December 4<sup>th</sup> was when four Tenant Education Specialists returned to work in the Tenant Education and Support Department: Ruthie, Nick, Brenden, and Andrea.

### **Winter Holiday Week**

CAT staff all had Dec. 22<sup>nd</sup>-Jan. 2<sup>nd</sup> off for our annual Winter Holiday Week. Several Ed. Dept. staff signed up to cover the hotline over the break excluding days the hotline was closed on 12/25 and 1/2.

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### TPT

Most tenants Thuy worked with needed help with eviction & housing search and several needed non-English language support.

Tenants Joy worked with had issues centering around evictions and repairs.

APANO referrals: 2

IRCO referrals: 5

SEI referrals: 8

No TPT workshops in December.

LASO referrals: 0

No legal referrals to Troy until partner agreement is in place.

CAT Policy Endorsements approved by CAT Board December 18, 2023

- Rent Stabilization rent assistance-\$45 million
- Affordable Housing Tenant engagement \$2 million
- Urban League \$10 million
- Oregon Worker Relief \$6 million
- 1000 Friends letter What We Need to Build More Housing. Endorsed by CAT in 2023.

**Newly requested endorsements for January 2024 CAT Board meeting. Policy summaries are attached.**

Housing Alliance Package

- Individual Development Accounts (IDAs): \$10 million
- Build new, affordable homes for first-time buyers: \$15 million
- Mortgages for homebuyers with individual taxpayer identification numbers
- Affordable housing preservation
- Keep Oregonians housed by preserving existing affordable housing: \$125 million
- Tenant outreach, education and resource navigation: \$2 million
- Homelessness prevention and shelter operations
- Keep Oregonians housed with emergency rent assistance: \$45 million
- Maintain homeless shelter operations: \$65 million
  - Act (ARPA) resources in Bend, Cottage Grove, Eugene, Medford and Salem
- HB 2699- Sponsored by Representative Gamba Provides minimum wage rate beginning July 1, 2024. Directs Bureau of Labor and Industries to establish formula by rule for setting minimum wage rate. (in relationship to the cost of housing)
- LC 178- Allows cities to impose Rent Control.
- LC 19 HAPO, Land Use Adjustments, Urban Growth Boundary expansions, and appropriations for housing production including Middle-Income Housing

Fair Shot Peoples Budget Package

- Rent Assistance \$63 million
- Childcare for Oregon \$220 million
- Housing Alliance Legislative Package
- Universal Representation \$7.5 million
- Climate Change fund 9 million
- Restorative Justice \$4 million
- Student Emergency \$6 million
- Universal Healthcare Governance Board .05 million

## CAT December Board Report 2023

- Healthy Homes \$15 million
- School-based health centers \$8.2 million programming and \$10 million construction

### Staffing

Four hotline specialists and the Membership and Volunteer Coordinator were hired in December. Offer letters went to two Tenant Engagement Coordinators and the Accounting and Administrative Manager.

### Development

CAT was awarded a general operating grant of \$100,000 from Meyer Memorial. OHCS were transferred. Multnomah County five-year tenant education grant was awarded.

### Finance

CAT is working to transfer financial data to Quickbooks Accounting online and payroll data to Clicktime and BBSI.

### Tenant Engagement

CAT is joining the Housing Alliance for the Housing Opportunity Day February 8<sup>th</sup>.

### Human Resources

CAT contracted BBSI to update the Personnel Handbook for approval by the Board in January.

### Enclosures:

- 1000 Friends What We Need for Housing Letter.
- Personnel Handbook for approval by the CAT Board.
- LC 178 Summary
- HB 2699 Summary
- Housing Alliance Legislative Package 2024
- Fairshot Package Legislative Package 2024

## CAT December Board Report 2023

Respaldos de políticas de CAT aprobados por la Junta de CAT el 18 de diciembre de 2023

- Asistencia para el alquiler para la estabilización del alquiler: 45 millones de dólares
- Participación de inquilinos en viviendas asequibles \$2 millones
- Liga Urbana \$10 millones
- Ayuda para trabajadores de Oregón \$6 millones
- Carta de 1000 Amigos Lo que necesitamos para construir más viviendas. Avalado por CAT en 2023.

Respaldos recientemente solicitados para la reunión de la Junta CAT de enero de 2024. Se adjuntan resúmenes de políticas.

Paquete de Alianza para la Vivienda

- o Cuentas de Desarrollo Individual (IDA): \$10 millones
- o Construir viviendas nuevas y asequibles para compradores primerizos: \$15 millones
- o Hipotecas para compradores de vivienda con números de identificación individual del contribuyente
- o Preservación de viviendas asequibles
- o Mantener a los habitantes de Oregón alojados preservando las viviendas asequibles existentes: \$125 millones
- o Divulgación, educación y navegación de recursos para inquilinos: \$2 millones
- o Prevención de personas sin hogar y operaciones de refugio
- o Mantener a los habitantes de Oregón alojados con asistencia de emergencia para el alquiler: \$45 millones
- o Mantener las operaciones de refugio para personas sin hogar: \$65 millones
- o Recursos de la Ley (ARPA) en Bend, Cottage Grove, Eugene, Medford y Salem

- HB 2699: Patrocinada por el Representante Gamba Proporciona una tasa de salario mínimo a partir del 1 de julio de 2024. Ordena a la Oficina de Trabajo e Industrias que establezca una fórmula por regla para establecer la tasa de salario mínimo. (en relación con el costo de la vivienda)

- LC 178- Permite a las ciudades imponer control de alquileres.

Paquete económico Fair Shot Peoples



## CAT December Board Report 2023

- o Asistencia para el alquiler \$63 millones
- o Cuidado infantil para Oregon \$220 millones
- o Paquete Legislativo de la Alianza para la Vivienda
- o Representación Universal \$7,5 millones
- o Fondo de Cambio Climático 9 millones
- o Justicia Restaurativa \$4 millones
- o Emergencia estudiantil \$6 millones
- o Junta de Gobernanza de la Atención Médica Universal 0,05 millones
- o Hogares Saludables \$15 millones
- o Centros de salud escolares \$8,2 millones de programación y \$10 millones de construcción

### Dotación de personal

En diciembre se contrataron cuatro especialistas de la línea directa y el Coordinador de Membresía y Voluntariado. Las cartas de oferta se enviaron a dos coordinadores de participación de inquilinos y al gerente administrativo y de contabilidad.

### Desarrollo

CAT recibió una subvención operativa general de \$100,000 de Meyer Memorial. OHCS fueron transferidos. Se otorgó una subvención de cinco años para la educación de inquilinos del condado de Multnomah.

### Finanzas

CAT está trabajando para transferir datos financieros a Quickbooks Accounting en línea y datos de nómina a Clicktime y BBSI.

### Compromiso del inquilino

CAT se une a la Alianza de Vivienda para el Día de la Oportunidad de Vivienda el 8 de febrero.

### Recursos humanos

CAT contrató a BBSI para actualizar el Manual del Personal para su aprobación por la Junta en enero.

## CAT December Board Report 2023

### Cerramientos:

- o Carta de 1000 Amigos Lo que Necesitamos para Vivienda.
- o Manual de Personal para aprobación de la Junta Directiva del CAT.
- o LC 178 Resumen
- o HB 2699 Resumen
- o Paquete Legislativo de la Alianza para la Vivienda 2024
- o Paquete Legislativo Fairshot 2024

- Hogares Saludables \$15 millones
- Centros de salud escolares \$8,2 millones de programación y \$10 millones de construcción

### Homeownership

These priorities act on recommendations of the 2021-22 Joint Task Force on Addressing Racial Disparities in Homeownership (JARDHO):

**1. Individual Development Accounts (IDAs): \$10 million**

Resources from the general fund to provide matched savings accounts and financial education for an additional 600-700+ households statewide – including those saving for homeownership, small businesses, higher education, and other goals.

**2. Build new, affordable homes for first-time buyers: \$15 million**

Resources from the general fund, to be paired with LIFT bonds to build new homes for first-time buyers in both urban and rural parts of the state.

**3. Mortgages for homebuyers with individual taxpayer identification numbers**

Establish a legislative task force charged with crafting legislation for the 2025 session that will resolve barriers to mortgage lending for borrowers who use an ITIN to establish their credit worthiness.

### Affordable housing preservation

**1. Keep Oregonians housed by preserving existing affordable housing: \$125 million**

Funds would be used by housing providers to acquire and/or renovate existing affordable housing, including manufactured housing parks and regulated properties with expiring affordability restrictions.

**2. Tenant outreach, education and resource navigation: \$2 million**

Grants would enable community-based organizations to connect with residents whose properties are scheduled to lose their affordability restrictions. Organizations would help residents understand their rights and options, access resources, and connect with housing providers that could acquire properties to secure long-term affordability.

### Homelessness prevention and shelter operations

**1. Keep Oregonians housed with emergency rent assistance: \$45 million**

Because the cost of rent is unaffordable for so many Oregonians, over 80% of evictions are for non-payment. Rent assistance funding allocated by the Legislature in 2023 did not meet the need, and will run out before the end of the biennium.

**2. Maintain homeless shelter operations: \$65 million**

Operating funds are needed for shelters that have previously been funded by the state, as well as locally-funded shelters such as those established using American Rescue Plan Act (ARPA) resources in Bend, Cottage Grove, Eugene, Medford and Salem.

# THE PEOPLE'S BUDGET

## FAIRSHOT FOR ALL

### **Prioritize the People**

Each year, our coalition creates the Fair Shot Priority Agenda and the People's Budget to provide Oregon legislators with a clear set of policy and funding priorities to advance racial, gender, and economic justice in our state. Despite harmful walkouts that threatened our families and communities, our legislative champions and supporters held strong to advance forward-thinking policies and investments. We are grateful to legislators for passing Fair Shot's 2023 priority agenda and for supporting many of the smart, community-led policies, programs, and workforce supports from the [2023 People's Budget](#).

While we celebrate our progress, we know that our communities are still bearing the brunt of the economic impacts of the pandemic and inflation. The high costs of housing, groceries, and bills affect all Oregonians, but not equally. A legacy of disinvestment has created economic disparities in our state that persist today for Black people, Indigenous people, people of color, women, LGBTQ+ people, immigrants, and working families.

In the upcoming legislative session, Oregonians are counting on legislators to make meaningful progress on the state's toughest challenges through strategic investments of our growing budget surplus. There is more work to do to ensure every Oregonian has access to housing, child care, health care, food, and justice, and to strengthen our workforce. **The Fair Shot for All coalition is highlighting some of the most pressing unfinished business for this biennium from the 2023 People's Budget.**

By prioritizing these investments in economic, racial, and gender justice, we continue to strengthen our overall economy and create lasting prosperity for all Oregonians.

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# THE PEOPLE'S BUDGET

## FAIRSHOT FOR ALL

Unfinished Business: Strategic investments to promote shared prosperity in Oregon

Priority	Estimated Investment	Description
<p>Housing and Rental Assistance</p> <p><i>Stable Homes for Oregon Families, Community Alliance of Tenants, Oregon Worker Relief, Urban League of Portland, Oregon Law Center</i></p>	<p>\$63M</p>	<p>As we work towards new production goals and to address homelessness, we must ensure that we turn off the spigot to the street.</p> <p>As our housing affordability crisis continues, more than 80% of all evictions happen because someone is behind on their rent. Each of these cases represents an Oregon household at risk of homelessness, and these numbers are just the tip of the iceberg – studies show that approximately five times the number of people in eviction court suffer displacement outside of Court.</p> <p>Rent assistance is the single most effective tool at preventing eviction and homelessness– making sure that landlords get paid and tenants stay housed. While legislators made important investments in 2023 to address the housing crisis, rent assistance programs were inadequately funded.</p> <p>Rent and other housing stability assistance programs by community-based and culturally-specific organizations and coalitions doing housing stability work are critical to reaching the Oregonians in every county in the state who are most vulnerable.</p> <p>Oregon should invest at least <b>\$45M in homelessness prevention rental assistance</b> and <b>\$10M to the Urban League</b> and <b>\$6M to Oregon Worker Relief Home Fund</b> to provide culturally specific housing stability programs that include rental</p>

# THE PEOPLE'S BUDGET

**FAIRSHOT FOR ALL**

		<p>assistance and critical wrap-around services. In addition, <b>\$2 million</b> is needed for outreach and navigation services to help tenants living in expiring affordable housing units avoid homelessness.</p>
<p>Childcare for Oregon</p> <p><i>Family Forward Oregon, APANO, Unite Oregon, PCUN</i></p>	<p>\$150-225M</p>	<p>Oregon families and employers rely on the availability and accessibility of high-quality childcare in every corner of the state. However, federal dollars have been pulled back and Oregon's 23-25 biennium budget does not adequately fund this essential infrastructure. At the beginning of 2023 DELC's request for ERDC was \$250M, and the legislature allocated only \$23M.</p> <p>Oregon families have already been shut out of enrollment in Employment Related Day Care. These subsidies are critical for Oregon children and families, child care providers, and employers.</p> <p>Without investments in child care, parents must cut their working hours or quit their jobs to care for their kids. This has devastating impacts for all Oregonians, but especially for women of color, who are most impacted by the failures of our current system and who also disproportionately work as child care providers in our state.</p>
<p>Universal Representation</p> <p><i>Oregon Worker Relief</i></p>	<p>\$7.5M</p>	<p>Universal legal representation helps keep Oregon families and communities whole by safeguarding against unjust deportation. Without representation, immigrant Oregonians are more likely to be deported, regardless of the merits of their case.</p> <p>One in eight workers in Oregon is an</p>

# THE PEOPLE'S BUDGET

## FAIRSHOT FOR ALL

		<p>immigrant, making up a vital part of the state's labor force. Oregon employers bear the high turnover costs of hiring, training, and lost productivity when their employees are unnecessarily detained and deported.</p> <p>One in 15 children in Oregon live with a family member who is undocumented. If a family's breadwinner is deported, family members face housing and food insecurity and children must cope with the incredible trauma of family separation, with long-lasting psychological impacts. Children's school attendance and performance are also negatively affected, increasing their likelihood of dropping out and earning significantly less as adults.</p> <p>Legislators can build upon the success of the 2022 Universal Representation bill by investing \$7.5M to maintain Equity Corps of Oregon, the statewide collaborative of community-based organizations, nonprofits, and attorneys that provides no-cost immigration legal services.</p>
Climate Change Fund <i>Oregon Worker Relief, PCUN, Oregon Law Center</i>	\$9M	<p>Oregonians increasingly face extreme heat waves, wildfires, and unhealthy air, but the dangers of the climate crisis are not evenly distributed.</p> <p>Agricultural workers are often forced to work in dangerous smoke and heat because they cannot afford to miss out on what are already extremely low wages. Many of Oregon's agricultural workers are immigrants, Indigenous, or Latinx and low-income and do essential work including farming, tree-planting, dairying, raising livestock, food processing, and nursery work.</p>

# THE PEOPLE'S BUDGET

## FAIRSHOT FOR ALL

		<p>Prioritizing relief to the members of our communities who are most impacted is key to developing an equitable response to climate disasters.</p> <p>The Climate Change Fund by Oregon Worker Relief provides financial assistance to agriculture workers when extreme heat or smoke pollution prevents them from working so they can take care of themselves and their families.</p> <p>The Climate Change Fund's initial funding was quickly distributed to 9,569 agricultural workers in 34 counties. We urge legislators to invest in the Climate Change Fund in 2024 to protect workers from climate extremes. This investment plays a crucial role in supporting agricultural workers in Oregon who contribute to the nourishment and wellbeing of our state.</p>
<p>Restorative Justice</p> <p><i>Restorative Justice Coalition of Oregon</i></p>	<p>\$4M</p>	<p>Restorative justice is a survivor-centered approach to accountability that focuses on promoting healing for those who have been harmed and on fostering true internal accountability for those who have caused harm.</p> <p>This community-based approach to harm serves as an alternative to prosecution. Restorative justice thereby creates a mechanism for relieving the pressure on Oregon's overburdened court and public defense systems and reducing the state's reliance on incarceration, while also making communities safer.</p> <p>In 2021, the Oregon legislature allocated \$4 million to the Criminal Justice Commission</p>



# THE PEOPLE'S BUDGET

## FAIRSHOT FOR ALL

		<p>(CJC) to develop the Restorative Justice Grant Program.</p> <p>This led to eight programs serving over thirteen counties receiving funding to initiate and/or expand restorative services. In the 2024 session, the Oregon Legislature has the opportunity to allow these programs to continue by appropriating \$4 million for this critical program.</p>
<p>School Based Health Centers</p>	<p>\$8.2M for programming</p> <p>\$10M for capital construction</p>	<p>School-based health centers (SBHCs) in Oregon deliver quality, affordable, cost-effective health care to young people and function like a doctor's office located on school grounds. They offer a range of medical and health services, enjoy broad community support, and help keep kids healthier, in school, and ready to learn. Investments in SBHCs benefit schools, families, communities, and serve thousands of Oregon youth every year.</p> <p>Many young people in Oregon still lack adequate access to the health care they need — and mental health care in particular — due to stigma, a lack of health insurance, an insurance policy with limited coverage, a lack of understanding about how to access care, poor access to transportation (especially in rural areas), and a lack of medical providers providing care under the Oregon Health Plan. SBHCs address each of these barriers by providing all school-aged youth with the care they need, whether they have private insurance, public assistance, or no insurance.</p> <p>In 2024, legislators can increase the availability of mental health services statewide by investing \$18.2M in our vital SBHCs. Mental health services embedded within school-based health centers create a</p>

# THE PEOPLE'S BUDGET

**FAIRSHOT FOR ALL**

		continuum of integrated care that improves children’s mental health, physical health, and educational attainment.
<p>Student Emergency Package</p> <p><i>Oregon Student Association, Partners for a Hunger-Free Oregon, Basic Needs Oregon, Open Oregon Educational Resources, Swipe Out Hunger</i></p>	\$6M	<p>College and university students in Oregon are reporting increased rates of food insecurity, housing instability, and challenges affording and accessing textbooks, transportation, childcare, and other basic needs.</p> <p>In 2021, the Oregon State Legislature took a critical step in addressing student basic needs insecurities by passing HB 2835, the Benefits Navigator Bill. This legislation was designed to close opportunity gaps and facilitate economic mobility by increasing access to federal, state, and local benefits for low income students at community colleges and public universities.</p> <p>The 2024 Student Emergency Needs Package is a bipartisan, student-centered effort to support Oregon’s Basic Needs Navigators and Textbook Affordability Program with \$6 million dollars in one-time, emergency funding.</p> <p>This policy will further support the legislature’s work of addressing students basic needs and textbook affordability by allowing every institution to pinpoint the programs/solutions that work best for their student body to better access housing, food, clothing, technology, textbooks, transportation and other student needs.</p>
<p>Universal Healthcare Governance Board</p>	\$0.5M	<p>A significant barrier to advance so many issues related to racial, gender, and economic justice is the current system’s complexity and</p>

# THE PEOPLE'S BUDGET

**FAIRSHOT** FOR ALL

<p><i>Healthcare for All Oregon</i></p>		<p>inequitable access to health care. This is why we need universal healthcare.</p> <p>In the 2023 Legislative Session, SB1089 established the Universal Health Plan Governance Board to put Oregon on a path to realizing the recently codified constitutional right to health care. The Universal Health Plan Governance Board will design a detailed, publicly funded, single payer universal health care system for recommendation to the Oregon Legislature for implementation to start as soon as 2027.</p> <p>The legislature should continue the immediate work of the Universal Healthcare Governance Board with an additional \$500,000 this biennium. This funding will help create and develop the positions and systems needed to work with the public, employers, and other stakeholders to achieve success.</p>
<p>Healthy Homes</p> <p><i>Oregon Just Transition Alliance, Building Resilience, APANO, Verde</i></p>	<p>\$15M</p>	<p>54% of Oregonians live in housing built before 1978 that is energy-inefficient and in need of repairs and weatherproofing.</p> <p>Families with low incomes, families living in rural and tribal communities, and individuals that identify as Black, Indigenous, or people of color are the most at risk due to decades of redlining and other discriminatory practices. Consequently, these communities are most harmed by sick days and hospital visits caused by mold, cold weather, and the inability to take refuge from bad outdoor air quality.</p> <p>The 2021 Oregon Legislature enacted</p>

# THE PEOPLE'S BUDGET

**FAIRSHOT** FOR ALL

		<p>groundbreaking legislation to help achieve Healthy Homes for low-income households and communities impacted by environmental justice factors. The Healthy Homes program provides grants to trusted nonprofits to provide financial assistance to eligible homeowners and landlords to repair and rehabilitate dwellings to address climate and other environmental hazards, ensure accessible homes for disabled residents, and make general repairs needed to maintain a safe and healthy home.</p> <p>Funding for Healthy Homes is expected to run out in 2024. Oregon should build on its initial investment from 2021 to make sure that all Oregonians can be healthy in their homes.</p>
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**Fair Shot for All** is an economic justice coalition of grassroots organizations and labor unions across the state who work together to create opportunities for all working families to thrive, build power with our communities, and dismantle historic and systemic economic inequities in our state. We are organized across race, class, and gender and center those of us who have been impacted most: Oregonians who are Black, Indigenous, Latinx, and/or people of color; LGBTQ+; women; and/or working class families. There is incredible strength in our numbers and our fierce belief in the future we are fighting for.

# House Bill 2699

Sponsored by Representative GAMBA (Presession filed.)

## SUMMARY

The following summary is not prepared by the sponsors of the measure and is not a part of the body thereof subject to consideration by the Legislative Assembly. It is an editor's brief statement of the essential features of the measure **as introduced**.

Provides minimum wage rate beginning July 1, 2024. Directs Bureau of Labor and Industries to establish formula by rule for setting minimum wage rate.

Makes conforming amendments.

Takes effect on 91st day following adjournment sine die.

## A BILL FOR AN ACT

1  
2 Relating to minimum wage rates; creating new provisions; amending ORS 137.103, 315.262, 464.250,  
3 653.010, 653.020, 653.025, 653.030, 653.033, 653.035, 653.070, 653.261 and 653.606; and prescribing  
4 an effective date.

5 **Be It Enacted by the People of the State of Oregon:**

6 **SECTION 1. Section 2 of this 2023 Act is added to and made a part of ORS 653.010 to**  
7 **653.261.**

8 **SECTION 2. (1) As used in this section, "fair market rent calculation methodology" is the**  
9 **methodology used by the federal Department of Housing and Urban Development to calculate**  
10 **fair market rent estimates of 40th percentile gross rents for standard quality one-bedroom**  
11 **rental units within each Oregon county and metropolitan area.**

12 **(2) Subject to subsection (3) of this section, beginning on July 1, 2024, the minimum wage**  
13 **rate shall be \$2 more than the minimum wage established under ORS 653.025 (1)(j), and shall**  
14 **be increased by \$2 every year thereafter, except that in no case may the minimum wage rate**  
15 **exceed the minimum wage rate calculated pursuant to the formula established by the Bureau**  
16 **of Labor and Industries under subsection (3) of this section.**

17 **(3) The Bureau of Labor and Industries shall establish by rule a formula for setting**  
18 **minimum wage rates in this state. At a minimum, the formula must be designed to:**

19 **(a) Use the fair market rent calculation methodology to determine the 50th percentile**  
20 **gross rents for standard quality one-bedroom units within each Oregon county or metropol-**  
21 **itan area.**

22 **(b) Ensure, as a minimum, that the minimum wage rate set by the bureau is sufficient**  
23 **to allow an individual who is paid at that rate to afford a one-bedroom apartment at a**  
24 **monthly rental rate that does not exceed 30 percent of the individual's monthly income.**

25 **(4)(a) Each year, the Commissioner of the Bureau of Labor and Industries shall calculate**  
26 **an adjustment of the wage rate as determined pursuant to the formula established under**  
27 **subsection (3) of this section, based on fair market rent estimates as prepared by the federal**  
28 **Department of Housing and Urban Development for the federal fiscal year immediately fol-**  
29 **lowing the year in which the wage rate determination is to be made.**

30 **(b) The commissioner shall adopt by rule a process for making the annual adjustments**

**NOTE:** Matter in **boldfaced** type in an amended section is new; matter *[italic and bracketed]* is existing law to be omitted.  
New sections are in **boldfaced** type.

1 **to the minimum wage rate required under this subsection.**

2 **SECTION 3.** ORS 653.025 is amended to read:

3 653.025. (1) Except as provided in subsections (2) and (3) of this section, ORS 652.020 and the  
 4 rules of the Commissioner of the Bureau of Labor and Industries issued under ORS 653.030 and  
 5 653.261, for each hour of work time that the employee is gainfully employed, no employer shall em-  
 6 ploy or agree to employ any employee at wages computed at a rate lower than:

7 (a) For calendar year 2003, \$6.90.

8 (b) From January 1, 2004, to June 30, 2016, a rate adjusted for inflation as calculated by the  
 9 commissioner.

10 (c) From July 1, 2016, to June 30, 2017, \$9.75.

11 (d) From July 1, 2017, to June 30, 2018, \$10.25.

12 (e) From July 1, 2018, to June 30, 2019, \$10.75.

13 (f) From July 1, 2019, to June 30, 2020, \$11.25.

14 (g) From July 1, 2020, to June 30, 2021, \$12.

15 (h) From July 1, 2021, to June 30, 2022, \$12.75.

16 (i) From July 1, 2022, to June 30, 2023, \$13.50.

17 (j) *[After June 30, 2023, Beginning on July 1 of each year,]* **From July 1, 2023, to June 30, 2024,**  
 18 a rate adjusted *[annually]* for inflation as described in subsection (5) of this section.

19 **(k) Beginning on July 1, 2024, and every year thereafter, a rate determined in section 2**  
 20 **of this 2023 Act.**

21 (2) If the employer is located within the urban growth boundary of a metropolitan service dis-  
 22 trict organized under ORS chapter 268, except as provided by ORS 652.020 and the rules of the  
 23 commissioner issued under ORS 653.030 and 653.261, for each hour of work time that the employee  
 24 is gainfully employed, no employer shall employ or agree to employ any employee at wages computed  
 25 at a rate lower than:

26 (a) From July 1, 2016, to June 30, 2017, \$9.75.

27 (b) From July 1, 2017, to June 30, 2018, \$11.25.

28 (c) From July 1, 2018, to June 30, 2019, \$12.

29 (d) From July 1, 2019, to June 30, 2020, \$12.50.

30 (e) From July 1, 2020, to June 30, 2021, \$13.25.

31 (f) From July 1, 2021, to June 30, 2022, \$14.

32 (g) From July 1, 2022, to June 30, 2023, \$14.75.

33 (h) *[After]* **From June 30, 2023, to June 30, 2024,** \$1.25 per hour more than the minimum wage  
 34 determined under subsection (1)(j) of this section.

35 **(i) Beginning on July 1, 2024, and every year thereafter, a rate determined under section**  
 36 **2 of this 2023 Act.**

37 (3) If the employer is located within a nonurban county as described in ORS 653.026, except as  
 38 provided by ORS 652.020 and the rules of the commissioner issued under ORS 653.030 and 653.261,  
 39 for each hour of work time that the employee is gainfully employed, no employer shall employ or  
 40 agree to employ any employee at wages computed at a rate lower than:

41 (a) From July 1, 2016, to June 30, 2017, \$9.50.

42 (b) From July 1, 2017, to June 30, 2018, \$10.

43 (c) From July 1, 2018, to June 30, 2019, \$10.50.

44 (d) From July 1, 2019, to June 30, 2020, \$11.

45 (e) From July 1, 2020, to June 30, 2021, \$11.50.

1 (f) From July 1, 2021, to June 30, 2022, \$12.

2 (g) From July 1, 2022, to June 30, 2023, \$12.50.

3 (h) [After] **From** June 30, 2023, **to June 30, 2024**, \$1 per hour less than the minimum wage de-  
 4 termined under subsection (1)(j) of this section.

5 **(i) Beginning on July 1, 2024, and every year thereafter, a rate determined under section**  
 6 **2 of this 2023 Act.**

7 (4) The commissioner shall adopt rules for determining an employer’s location under subsection  
 8 (2) of this section.

9 (5)(a) The Oregon minimum wage shall be adjusted for inflation as provided in paragraph (b) of  
 10 this subsection.

11 (b) No later than April 30, [of each year, beginning in] 2023, the commissioner shall calculate  
 12 an adjustment of the wage amount specified in subsection (1)(j) of this section based upon the in-  
 13 crease, if any, from March of the preceding year to March of the year in which the calculation is  
 14 made in the U.S. City Average Consumer Price Index for All Urban Consumers for All Items as  
 15 prepared by the Bureau of Labor Statistics of the United States Department of Labor or its suc-  
 16 cessor.

17 (c) The wage amount as adjusted under this subsection shall be rounded to the nearest five  
 18 cents.

19 *[(d) The wage amount as adjusted under this subsection becomes effective as the new Oregon*  
 20 *minimum wage amount, replacing the minimum wage amount specified in subsection (1)(j) of this sec-*  
 21 *tion, on July 1 of the year in which the calculation is made.]*

22 **SECTION 4.** ORS 137.103 is amended to read:

23 137.103. As used in ORS 137.101 to 137.109:

24 (1) “Criminal activities” means any offense with respect to which the defendant is convicted or  
 25 any other criminal conduct admitted by the defendant.

26 (2) “Economic damages”:

27 (a) Has the meaning given that term in ORS 31.705, except that “economic damages” does not  
 28 include future impairment of earning capacity; and

29 (b) In cases involving criminal activities described in ORS 163.263, 163.264 or 163.266, includes  
 30 the greater of:

31 (A) The value to the defendant of the victim’s services as defined in ORS 163.261; or

32 (B) The value of the victim’s services, as defined in ORS 163.261, computed using the minimum  
 33 wage established under ORS 653.025 **and section 2 of this 2023 Act, as applicable**, and the over-  
 34 time provisions of the federal Fair Labor Standards Act of 1938 (29 U.S.C. 201 et seq.).

35 (3) “Restitution” means full, partial or nominal payment of economic damages to a victim.  
 36 Restitution is independent of and may be awarded in addition to a compensatory fine awarded under  
 37 ORS 137.101.

38 (4) “Victim” means:

39 (a) The person or decedent against whom the defendant committed the criminal offense, if the  
 40 court determines that the person or decedent has suffered or did suffer economic damages as a re-  
 41 sult of the offense.

42 (b) Any person not described in paragraph (a) of this subsection whom the court determines has  
 43 suffered economic damages as a result of the defendant’s criminal activities.

44 (c) The Criminal Injuries Compensation Account, if it has expended moneys on behalf of a victim  
 45 described in paragraph (a) of this subsection.

1 (d) An insurance carrier, if it has expended moneys on behalf of a victim described in paragraph  
2 (a) of this subsection.

3 (e) Upon the death of a victim described in paragraph (a) or (b) of this subsection, the estate  
4 of the victim.

5 (f) The estate, successor in interest, trust, trustee, successor trustee or beneficiary of a trust  
6 against which the defendant committed the criminal offense, if the court determines that the estate,  
7 successor in interest, trust, trustee, successor trustee or beneficiary of a trust suffered economic  
8 damages as a result of the offense.

9 (5) "Victim" does not include any coparticipant in the defendant's criminal activities.

10 **SECTION 5.** ORS 315.262 is amended to read:

11 315.262. (1) As used in this section:

12 (a) "Child care" means care provided to a qualifying child of the taxpayer for the purpose of  
13 allowing the taxpayer to be gainfully employed, to seek employment or to attend school on a full-  
14 time or part-time basis, except that the term does not include care provided by:

15 (A) The child's parent or guardian, unless the care is provided in a certified or registered child  
16 care facility; or

17 (B) A person who has a relationship to the taxpayer that is described in section 152(a) of the  
18 Internal Revenue Code who has not yet attained 19 years of age at the close of the tax year.

19 (b) "Child care expenses" means the costs associated with providing child care to a qualifying  
20 child of a qualified taxpayer.

21 (c) "Disability" means a physical or cognitive condition that results in a person requiring as-  
22 sistance with activities of daily living.

23 (d) "Earned income" has the meaning given that term in section 32 of the Internal Revenue  
24 Code.

25 (e) "Qualified taxpayer" means a taxpayer:

26 (A) Who is an Oregon resident with at least \$6,000 of earned income for the tax year or who is  
27 a nonresident of Oregon with at least \$6,000 of earned income from Oregon sources for the tax year;

28 (B) With federal adjusted gross income for the tax year that does not exceed 250 percent of the  
29 federal poverty level;

30 (C) With Oregon adjusted gross income for the tax year that does not exceed 250 percent of the  
31 federal poverty level; and

32 (D) Who does not have more than the maximum amount of disqualified income under section  
33 32(i) of the Internal Revenue Code that is allowed to a taxpayer entitled to the earned income tax  
34 credit for federal tax purposes.

35 (f) "Qualifying child" has the meaning given that term in section 152(c) of the Internal Revenue  
36 Code, determined without regard to section 152(c)(1)(D) of the Internal Revenue Code or section  
37 152(e) of the Internal Revenue Code, except that it is limited to an individual who is under 13 years  
38 of age, or who is a child with a disability, as that term is defined in ORS 316.099.

39 (2) A taxpayer is not disqualified from claiming the credit under this section solely because the  
40 taxpayer's spouse has a disability, if the disability is such that it prevents the taxpayer's spouse  
41 from providing child care, being gainfully employed, seeking employment and attending school. The  
42 Department of Revenue may require that a physician verify the existence of the disability and its  
43 severity.

44 (3) A qualified taxpayer shall be allowed a credit against the taxes otherwise due under ORS  
45 chapter 316 equal to the applicable percentage of the qualified taxpayer's child care expenses



1 (rounded to the nearest \$50).

2 (4) The applicable percentage to be used in calculating the amount of the credit provided in this  
 3 section shall be determined in accordance with the following table:

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4	5	6	7	8	9	10
	Applicable	Greater of Oregon				
	Percentage	Adjusted Gross Income or				
		Federal Adjusted				
		Gross Income, as Percent				
		of Federal Poverty Level				
11						
12	40	200 or less				
13	36	Greater than 200 and less than				
14		or equal to 210				
15	32	Greater than 210 and less than				
16		or equal to 220				
17	24	Greater than 220 and less than				
18		or equal to 230				
19	16	Greater than 230 and less than				
20		or equal to 240				
21	8	Greater than 240 and less than				
22		or equal to 250				
23	0	Greater than 250 percent				
24		of federal poverty level				
25						

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26  
 27 (5) The department may:

28 (a) Adopt rules for carrying out the provisions of this section; and

29 (b) Prescribe the form used to claim a credit and the information required on the form. The form  
 30 may provide for verification of an individual’s disability by a physician, if applicable, as described  
 31 in subsection (2) of this section.

32 (6) In the case of a credit allowed under this section:

33 (a) A nonresident shall be allowed the credit under this section in the proportion provided in  
 34 ORS 316.117.

35 (b) If a change in the status of a taxpayer from resident to nonresident or from nonresident to  
 36 resident occurs, the credit allowed by this section shall be determined in a manner consistent with  
 37 ORS 316.117.

38 (c) If a change in the taxable year of a taxpayer occurs as described in ORS 314.085, or if the  
 39 Department of Revenue terminates the taxpayer’s taxable year under ORS 314.440, the credit al-  
 40 lowed under this section shall be prorated or computed in a manner consistent with ORS 314.085.

41 (d) In the case of a qualified taxpayer who is married, a credit shall be allowed under this sec-  
 42 tion only if:

43 (A) The taxpayer files a joint return;

44 (B) The taxpayer files a separate return and is legally separated or subject to a separate main-  
 45 tenance agreement; or

1 (C) The taxpayer files a separate return and the taxpayer and the taxpayer’s spouse reside in  
 2 separate households on the last day of the tax year with the intent of remaining in separate  
 3 households in the future.

4 (7) If the amount allowable as a credit under this section, when added to the sum of the amounts  
 5 allowable as payment of tax under ORS 316.187 (withholding), ORS 316.583 (estimated tax), other tax  
 6 prepayment amounts and other refundable credit amounts, exceeds the taxes imposed by ORS chap-  
 7 ters 314 and 316 for the tax year (reduced by any nonrefundable credits allowable for purposes of  
 8 ORS chapter 316 for the tax year), the amount of the excess shall be refunded to the taxpayer as  
 9 provided in ORS 316.502.

10 (8)(a) The minimum amount of earned income a taxpayer must earn in order to be a qualified  
 11 taxpayer shall be adjusted for tax years beginning in each calendar year by multiplying \$6,000 by  
 12 the ratio of the monthly averaged U.S. City Average Consumer Price Index for the 12 consecutive  
 13 months ending August 31 of the prior calendar year over the monthly averaged index for the second  
 14 quarter of the calendar year 1998.

15 (b) As used in this subsection, “U.S. City Average Consumer Price Index” means the U.S. City  
 16 Average Consumer Price Index for All Urban Consumers (All Items) as published by the Bureau of  
 17 Labor Statistics of the United States Department of Labor.

18 (c) If any adjustment determined under paragraph (a) of this subsection is not a multiple of \$50,  
 19 the adjustment shall be rounded to the nearest multiple of \$50.

20 (d) Notwithstanding paragraphs (a) to (c) of this subsection, the adjusted minimum amount of  
 21 earned income a taxpayer must earn may not exceed the amount an individual would earn if the  
 22 individual worked 1,040 hours at the minimum wage established under ORS 653.025 **and section 2**  
 23 **of this 2023 Act, as applicable**, and in effect on January 1 of the calendar year in which begins  
 24 the tax year of the taxpayer, rounded to the next lower multiple of \$50.

25 **SECTION 6.** ORS 464.250 is amended to read:

26 464.250. (1) The Department of Justice has the following powers and duties relating to the reg-  
 27 ulation of bingo, lotto or raffle games or Monte Carlo events:

28 (a) To authorize and regulate the operation of bingo, lotto and raffle games and Monte Carlo  
 29 events permitted under ORS 167.117 and to adopt rules in accordance with applicable provisions of  
 30 ORS chapter 183 for the performance of the department’s duties.

31 (b) To issue and renew licenses and permits for operation of bingo, lotto and raffle games and  
 32 Monte Carlo events, including the manufacturers and suppliers of equipment and supplies necessary  
 33 for the operation of the games and events and escrow agents holding money or property to be  
 34 awarded as a prize, and to adopt license and permit fees. Licenses and permits are valid for one year  
 35 unless renewed. The department shall set fees at an amount sufficient to cover all costs incurred  
 36 by the department in its activities. License fees consist of an initial payment, in an amount estab-  
 37 lished by rule, prior to issuance or renewal of the license, together with a monthly payment con-  
 38 stituting a percentage of the licensee’s monthly gross income from the operation each month  
 39 thereafter. An applicant for a license or a permit shall submit with the application a sum adequate  
 40 to pay the required initial fee payment. If the applicant later withdraws the application or the de-  
 41 partment denies the application, the department shall retain the portion of the amount submitted to  
 42 it that will pay the reasonable costs expended for processing and investigating the application. If  
 43 the fee adopted by the department is less than the actual expenses of the department to investigate  
 44 an application, the department may charge to the applicant an additional fee to repay the depart-  
 45 ment for those costs. The department may refuse to proceed with its investigation or to issue a li-

1 cense until the department has been fully paid for those costs. The department shall create at least  
2 two classes of licenses for each activity regulated under this section. The licensing and operational  
3 requirements for licensees and the extent to which background checks are conducted under para-  
4 graph (d)(B) of this subsection must be commensurate with the size of the licensee's bingo, lotto,  
5 raffle or Monte Carlo event operations. The department shall adopt rules exempting from licensing  
6 any organization that would otherwise qualify for a license and that is engaged in minimal bingo,  
7 lotto or Monte Carlo event activity.

8 (c) To prescribe the manner and method of payment of all moneys to be paid to or collected by  
9 the department.

10 (d) To adopt requirements as to what information an applicant must provide to the department.  
11 However, each license applicant must provide, and the department shall require, the names and ad-  
12 dresses of all persons having a management or ownership interest in the bingo, lotto, raffle or Monte  
13 Carlo event operation or in the premises on which the operation is conducted and the names and  
14 addresses of all officers and directors of the applicant organization. The department shall also re-  
15 quire the names and addresses of all persons employed in bingo, lotto, raffle or Monte Carlo event  
16 operations. The following apply to applications under this paragraph:

17 (A) An applicant shall certify, under oath, that the persons named on the application are all of  
18 the persons known by the applicant to have an interest in the bingo, lotto, raffle or Monte Carlo  
19 event operation or the premises on which the operation is conducted including all officers and di-  
20 rectors of the applicant organization.

21 (B) The department may require fingerprints, a photograph, a handwriting sample and back-  
22 ground checks, including state and nationwide criminal records checks under ORS 181A.195, on any  
23 person seeking a license from it or any person holding an interest in any bingo, lotto, raffle or  
24 Monte Carlo event operation or in the premises on which it is conducted. The department may also  
25 require fingerprints or background checks, including state and nationwide criminal records checks  
26 under ORS 181A.195, of any manager or other employee of such a bingo, lotto, raffle or Monte Carlo  
27 event operation.

28 (e) To adopt record keeping requirements for licensees of the department and the submission of  
29 reports to the department as the department determines necessary. The department may require  
30 licensees to record and report income from bingo, lotto, raffle, Monte Carlo events, concessions and  
31 other related operations, the amounts received from each player, the costs and expenses of oper-  
32 ations, the nature and value of prizes and the fact of distribution of such prizes to the winners  
33 thereof. The department may adopt internal financial and inventory control requirements under this  
34 paragraph that are based on and commensurate with the size of a licensee's bingo, lotto, raffle or  
35 Monte Carlo event operations.

36 (f) To regulate and establish maximum limits on income derived by licensees from bingo, lotto,  
37 raffles or Monte Carlo events. However, in establishing limits, the department shall take into ac-  
38 count:

39 (A) The nature, character and scope of the activities of the licensee;

40 (B) The sources of other income to the licensee; and

41 (C) The percentage or extent to which income derived from bingo, lotto, raffles or Monte Carlo  
42 events is used for charitable purposes, as distinguished from nonprofit purposes other than charity.

43 (g) To regulate the manner of operation of bingo, lotto and raffle games and Monte Carlo events  
44 conducted by licensees, including the approval of which games may be played and the equipment to  
45 be used. The department shall regulate the types of equipment, rules and methods of play to ensure

1 the integrity and fairness of the games.

2 (h) To cooperate with state and local law enforcement agencies in investigating matters within  
3 the scope of the department's duties and responsibilities.

4 (i) To establish maximum limits on compensation paid to persons employed by charitable,  
5 fraternal or religious licensees, for the purpose of conducting licensed games, not to exceed 200  
6 percent of the applicable Oregon minimum wage rate under ORS 653.025 **or, if applicable, under**  
7 **section 2 of this 2023 Act**, or, for a person who supervises a bingo, lotto, raffle or Monte Carlo  
8 event operation for a charitable, fraternal or religious organization and is subject to the limitations  
9 of ORS 464.340, 300 percent of the applicable Oregon minimum wage rate under ORS 653.025 **or**  
10 **under section 2 of this 2023 Act, if applicable**, and to establish maximum limits for other expenses  
11 connected with such operations. In establishing these limits, the department shall consider the  
12 amount of income received, or expected to be received, by the organization from the bingo, lotto,  
13 raffle, Monte Carlo events, concessions and other related operations and the amount of money the  
14 operation could generate for the organization's purposes absent such expenses. The department may  
15 also take into account other factors, including but not limited to whether charitable purposes are  
16 benefited by the activities.

17 (2) The department may not require a person working as a volunteer in a bingo, lotto, raffle or  
18 Monte Carlo event operation conducted by a bona fide charitable, fraternal or religious organization  
19 to obtain a permit for such work if the person does not receive compensation of any kind from the  
20 organization, other than reimbursement for actual or reasonable expenses, or have any managerial  
21 or supervisory responsibility in connection with it. The department may require that bingo, lotto,  
22 raffle and Monte Carlo event operators employing unlicensed volunteers submit to the department  
23 periodically the names, addresses and dates of birth of the volunteers. The department may adopt  
24 reasonable character standards for volunteers, and if a volunteer does not meet the standards, the  
25 department may require that the licensee not allow the volunteer to work for the licensee.

26 (3) Subject to ORS 167.118, the department may establish by rule value limits for prizes awarded  
27 at bingo, lotto or raffle games or Monte Carlo events and may regulate or prohibit the giving to  
28 patrons of any other thing of value to promote attendance at the games.

29 (4) The department may establish by rule a maximum amount that a person may wager at a  
30 Monte Carlo event.

31 **SECTION 7.** ORS 653.010 is amended to read:

32 653.010. As used in ORS 653.010 to 653.261, unless the context requires otherwise:

33 (1) "Commissioner" means the Commissioner of the Bureau of Labor and Industries.

34 (2) "Employ" includes to suffer or permit to work but does not include voluntary or donated  
35 services performed for no compensation or without expectation or contemplation of compensation  
36 as the adequate consideration for the services performed for a public employer referred to in sub-  
37 section (3) of this section, or a religious, charitable, educational, public service or similar nonprofit  
38 corporation, organization or institution for community service, religious or humanitarian reasons or  
39 for services performed by general or public assistance recipients as part of any work training pro-  
40 gram administered under the state or federal assistance laws.

41 (3) "Employer" means any person who employs another person including the State of Oregon  
42 or a political subdivision thereof or any county, city, district, authority, public corporation or entity  
43 and any of their instrumentalities organized and existing under law or charter.

44 (4) "Minor" means any person under 18 years of age.

45 (5) "Occupation" means any occupation, service, trade, business, industry, or branch or group

1 of industries or employment or class of employment in which employees are gainfully employed.

2 (6) "Organized camp" means a day or resident camp, whether or not operated for profit, estab-  
3 lished to give campers recreational, creative, religious or educational experience in cooperative  
4 group living wherein the activities are conducted on a closely supervised basis, whether or not the  
5 camp is used primarily by an organized group or by members of the public and whether or not the  
6 activities or facilities are furnished free of charge or for the payment of a fee.

7 (7) "Outside salesperson" means any employee who is employed for the purpose of and who is  
8 customarily and regularly engaged away from the employer's place or places of business in making  
9 sales, or obtaining orders, or obtaining contracts for services and whose hours of work of any other  
10 nature for the employer do not exceed 30 percent of the hours worked in the workweek by the  
11 nonexempt employees of the employer.

12 (8) "Piece-rate" means a rate of pay calculated on the basis of the quantity of the crop har-  
13 vested.

14 (9) "Salary" means no less than the wage set pursuant to ORS 653.025 **or section 2 of this 2023**  
15 **Act, if applicable**, multiplied by 2,080 hours per year, then divided by 12 months.

16 (10) "Wages" means compensation due to an employee by reason of employment, payable in legal  
17 tender of the United States or check on banks convertible into cash on demand at full face value,  
18 subject to such deductions, charges or allowances as are permitted in ORS 653.035.

19 (11) "Work time" includes both time worked and time of authorized attendance.

20 **SECTION 8.** ORS 653.020 is amended to read:

21 653.020. ORS 653.010 to 653.261 do not apply to any of the following employees:

22 (1) An individual employed in agriculture if:

23 (a) Such individual is employed as a hand harvest or pruning laborer and is paid on a piece-rate  
24 basis in an operation which has been, and is customarily and generally recognized as having been,  
25 paid on a piece-rate basis in the region of employment and is employed by an employer who did not,  
26 during any calendar quarter during the preceding year, use more than 500 piece-rate-work-days of  
27 agricultural labor;

28 (b) Such individual is the parent, spouse, child or other member of the employer's immediate  
29 family;

30 (c) Such individual:

31 (A) Is employed as a hand harvest or pruning laborer and is paid on a piece-rate basis in an  
32 operation which has been, and is customarily and generally recognized as having been, paid on a  
33 piece-rate basis in the region of employment;

34 (B) Commutes daily from a permanent residence to the farm on which the individual is so em-  
35 ployed; and

36 (C) Has been employed in agricultural labor less than 13 weeks during the preceding calendar  
37 year;

38 (d) Such individual, other than an individual described in paragraph (c) of this subsection:

39 (A) Is 16 years of age or under and is employed as a hand harvest laborer, is paid on a piece-rate  
40 basis in an operation which has been, and is customarily and generally recognized as having been,  
41 paid on a piece-rate basis in the region of employment; and

42 (B) Is paid at the same piece-rate as employees over 16 years of age on the same farm; or

43 (e) Such employee is principally engaged in the range production of livestock and earns a salary  
44 and is paid on a salary basis.

45 (2) An individual employed in domestic service on a casual basis in or about a family home.

- 1 (3) An individual engaged in administrative, executive or professional work who:
- 2 (a) Performs predominantly intellectual, managerial or creative tasks;
- 3 (b) Exercises discretion and independent judgment; and
- 4 (c) Earns a salary and is paid on a salary basis.
- 5 (4) An individual employed by the United States.
- 6 (5) An individual who is employed by an institution whose function is primary or secondary ed-
- 7 ucation, and in which the individual is an enrolled student.
- 8 (6) An individual engaged in the capacity of an outside salesperson or taxicab operator.
- 9 (7) An individual domiciled at a place of employment for the purpose of being available for
- 10 emergency or occasional duties for time other than that spent performing these duties, provided that
- 11 when the individual performs emergency or occasional duties, the individual must be paid no less
- 12 than the wage specified in ORS 653.025 **or section 2 of this 2023 Act, if applicable.**
- 13 (8) An individual paid for specified hours of employment, the only purpose of which is to be
- 14 available for recall to duty.
- 15 (9) An individual domiciled at multiunit accommodations designed to provide other people with
- 16 temporary or permanent lodging, for the purpose of maintenance, management or assisting in the
- 17 management of same.
- 18 (10) An individual employed on a seasonal basis at:
- 19 (a) An organized camp operated for profit that generates gross annual income of less than
- 20 \$500,000; or
- 21 (b) A nonprofit organized camp.
- 22 (11) An individual employed at a nonprofit conference ground or center operated for educational,
- 23 charitable or religious purposes.
- 24 (12) An individual who performs services as a volunteer firefighter, as defined in ORS 652.050.
- 25 (13) An individual who performs child care services in the home of the individual or in the home
- 26 of the child.
- 27 (14) An individual employed in domestic service employment in or about a family home to pro-
- 28 vide companionship services for individuals who, because of age or infirmity, are unable to care for
- 29 themselves.
- 30 (15) An individual who performs service as a caddy at a golf course in an established program
- 31 for the training and supervision of caddies under the direction of a person who is an employee of
- 32 the golf course.
- 33 (16) An individual who volunteers as a golf course marshal if:
- 34 (a) The services the individual provides are limited to monitoring starting times and speed of
- 35 play and informing golfers of golf course etiquette;
- 36 (b) The individual is not allowed to provide volunteer golf course marshal services for more than
- 37 30 hours in a calendar week; and
- 38 (c) The individual receives no wage other than golf passes for providing the volunteer golf
- 39 course marshal services.
- 40 (17) An individual employed as a resident manager by an adult foster home that is licensed
- 41 pursuant to ORS 443.705 to 443.825 and who is domiciled at the adult foster home.
- 42 (18) An individual residing in a mobile home park or manufactured dwelling park designed to
- 43 provide other people with temporary or permanent lodging, for the purpose of maintenance, man-
- 44 agement or in assisting in the management of same.
- 45 (19) An individual who volunteers as a campground host and who resides in a campground

1 owned by a public agency that provides temporary accommodations for travelers, whether under  
2 public or private management, and who provides information and emergency assistance.

3 (20) An individual who:

4 (a) Is registered with the National Ski Patrol or a similar nonprofit ski patrol organization as  
5 a nonprofessional ski patroller and who receives no wage other than passes authorizing access to  
6 and use of a ski area, as defined in ORS 30.970, for performing ski patrol services, including but not  
7 limited to services related to preserving the safety of and providing information to skiers or  
8 snowboarders; or

9 (b) Receives no wage other than passes authorizing access to and use of a ski area, as defined  
10 in ORS 30.970, for performing services directly related to the organizing or conducting of skiing or  
11 snowboarding races or other similar competitions that are:

12 (A) Sponsored and organized by a nonprofit corporation, as defined in ORS 65.001; and

13 (B) Held in a ski area, as defined in ORS 30.970.

14 **SECTION 9.** ORS 653.030 is amended to read:

15 653.030. The Commissioner of the Bureau of Labor and Industries shall issue rules prescribing  
16 the employment of other types of persons at fixed minimum hourly wage rates lower than the mini-  
17 mum wage rate required by ORS 653.025 **or section 2 of this 2023 Act, as applicable**, when the  
18 commissioner has determined that the application of ORS 653.025 **or section 2 of this 2023 Act**  
19 would substantially curtail opportunities for employment for specific types of persons. The types of  
20 persons for whom a minimum hourly wage rate may be set are limited to persons who are student-  
21 learners, as defined in ORS 653.070.

22 **SECTION 10.** ORS 653.033 is amended to read:

23 653.033. (1) An employer who is authorized to employ individuals with disabilities at subminimum  
24 wage pursuant to a special certificate issued under 29 U.S.C. 214(c) or in accordance with rules  
25 under ORS 653.030 or of the Department of Human Services may not employ or agree to employ  
26 individuals with disabilities at an hourly rate lower than:

27 (a) From July 1, 2020, to June 30, 2021, \$9.25.

28 (b) From July 1, 2021, to June 30, 2022, \$10.75.

29 (c) From July 1, 2022, to June 30, 2023, \$12.50.

30 (2) After June 30, 2023, an employer who is authorized to employ individuals with disabilities  
31 at subminimum wage pursuant to a special certificate issued under 29 U.S.C. 214(c) or in accordance  
32 with rules under ORS 653.030 or of the Department of Human Services may not employ or agree to  
33 employ individuals with disabilities at a rate lower than the hourly rate required under ORS 653.025  
34 **or section 2 of this 2023 Act, as applicable.**

35 **SECTION 11.** ORS 653.035 is amended to read:

36 653.035. (1) Employers may deduct from the minimum wage to be paid employees under ORS  
37 653.025, 653.030 or 653.261, **or under section 2 of this 2023 Act, as applicable**, the fair market  
38 value of lodging, meals or other facilities or services furnished by the employer for the private  
39 benefit of the employee.

40 (2) Employers may include commission payments to employees as part of the applicable minimum  
41 wage for any pay period in which the combined wage and commission earnings of the employee will  
42 comply with ORS 653.010 to 653.261. In any pay period where the combined wage and commission  
43 payments to the employee do not add up to the applicable minimum wage under ORS 653.010 to  
44 653.261, the employer shall pay the minimum rate as prescribed in ORS 653.010 to 653.261.

45 (3) Employers, including employers regulated under the federal Fair Labor Standards Act, may

1 not include any amount received by employees as tips in determining the amount of the minimum  
2 wage required to be paid by ORS 653.010 to 653.261.

3 **SECTION 12.** ORS 653.070 is amended to read:

4 653.070. (1) As used in this section:

5 (a) "Bona fide professional training program" includes any professional training program ap-  
6 proved by the Superintendent of Public Instruction pursuant to rules of the State Board of Education  
7 which provides for part-time employment training which may be scheduled for a part of the workday  
8 or workweek, for alternating weeks or for other limited periods during the year, supplemented by  
9 and integrated with a definitely organized plan of instruction designed to teach technical knowledge  
10 and related information given as a regular part of the student-learner's course by an accredited  
11 school, college or university.

12 (b) "Student-learner" means a student who is receiving instruction in an accredited school, col-  
13 lege or university and who is employed on a part-time basis, pursuant to a bona fide professional  
14 training program.

15 (2) Notwithstanding ORS 653.025, employers shall pay student-learners at least 75 percent of the  
16 minimum wage prescribed by ORS 653.025 **or section 2 of this 2023 Act, as applicable.**

17 (3) The number of hours of employment training for a student-learner at subminimum wages,  
18 when added to the hours of school instruction, shall not exceed eight hours on any day or 40 hours  
19 in any week.

20 (4) The Commissioner of the Bureau of Labor and Industries may adopt rules prescribing the  
21 procedures and requirements for application and issuance of special certificates authorizing the  
22 employment of student-learners at subminimum wages. The rules shall require that the following  
23 conditions be satisfied before the issuance of such special certificates:

24 (a) The employment of the student-learner at subminimum wages authorized by the special cer-  
25 tificate must be necessary to prevent curtailment of opportunities for employment.

26 (b) The occupation for which the student-learner is receiving preparatory training must require  
27 a sufficient degree of skill to necessitate a substantial learning period.

28 (c) The training must not be for the purpose of acquiring manual dexterity and high production  
29 speed in repetitive operations.

30 (d) The employment of a student-learner must not have the effect of displacing a worker em-  
31 ployed in the establishment.

32 (e) The employment of the student-learners at subminimum wages must not tend to impair or  
33 depress the wage rates or working standards established for experienced workers for work of a like  
34 or comparable character.

35 (f) The occupational needs of the community or industry warrant the training of student-  
36 learners.

37 (g) There are no serious outstanding violations of the provisions of a student-learner certificate  
38 previously issued to the employer, or serious violations of any other provisions of law by the em-  
39 ployer which provide reasonable grounds to conclude that the terms of the certificate would not be  
40 complied with, if issued.

41 (h) The issuance of such a certificate would not tend to prevent the development of apprentice-  
42 ship under ORS 660.002 to 660.210 or would not impair established apprenticeship standards in the  
43 occupation or industry involved.

44 (i) The number of student-learners to be employed in one establishment must not be more than  
45 a small proportion of its working force.



1 (5) Failure to comply with subsection (2) or (3) of this section shall subject the employer to a  
 2 penalty of 75 percent of the minimum wage prescribed by ORS 653.025 **or section 2 of this 2023**  
 3 **Act, as applicable**, for each hour of work time that the student-learner is gainfully employed. The  
 4 Commissioner of the Bureau of Labor and Industries shall have a cause of action against the em-  
 5 ployer for the recovery of the penalty.

6 **SECTION 13.** ORS 653.261 is amended to read:

7 653.261. (1)(a) The Commissioner of the Bureau of Labor and Industries may adopt rules pre-  
 8 scribing such minimum conditions of employment, excluding minimum wages **except as otherwise**  
 9 **provided in section 2 of this 2023 Act**, in any occupation as may be necessary for the preservation  
 10 of the health of employees. The rules may include, but are not limited to, minimum meal periods and  
 11 rest periods, and maximum hours of work, but not less than eight hours per day or 40 hours per  
 12 workweek; however, after 40 hours of work in one workweek overtime may be paid, but in no case  
 13 at a rate higher than one and one-half times the regular rate of pay of the employees when computed  
 14 without benefit of commissions, overrides, spiffs and similar benefits.

15 (b) As used in this subsection, “workweek” means a fixed period of time established by an em-  
 16 ployer that reflects a regularly recurring period of 168 hours or seven consecutive 24-hour periods.  
 17 A workweek may begin on any day of the week and any hour of the day and need not coincide with  
 18 a calendar week. The beginning of the workweek may be changed if the change is intended to be  
 19 permanent and is not designed to evade overtime requirements.

20 (2) Rules adopted by the commissioner pursuant to subsection (1) of this section do not apply  
 21 to individuals employed by this state or a political subdivision or quasi-municipal corporation  
 22 thereof if other provisions of law or collective bargaining agreements prescribe rules pertaining to  
 23 conditions of employment referred to in subsection (1) of this section, including meal periods, rest  
 24 periods, maximum hours of work and overtime.

25 (3) Rules adopted by the commissioner pursuant to subsection (1) of this section regarding meal  
 26 periods and rest periods do not apply to nurses who provide acute care in hospital settings if pro-  
 27 visions of collective bargaining agreements entered into by the nurses prescribe rules concerning  
 28 meal periods and rest periods.

29 (4)(a) The commissioner shall adopt rules regarding meal periods for employees who serve food  
 30 or beverages, receive tips and report the tips to the employer.

31 (b) In rules adopted by the commissioner under paragraph (a) of this subsection, the commis-  
 32 sioner shall permit an employee to waive a meal period. However, an employer may not coerce an  
 33 employee into waiving a meal period.

34 (c) Notwithstanding ORS 653.256 (1), in addition to any other penalty provided by law, the  
 35 commissioner may assess a civil penalty not to exceed \$2,000 against an employer that the commis-  
 36 sioner finds has coerced an employee into waiving a meal period in violation of this subsection. Each  
 37 violation is a separate and distinct offense. In the case of a continuing violation, each day’s con-  
 38 tinuance is a separate and distinct violation.

39 (d) Civil penalties authorized by this subsection shall be imposed in the manner provided in ORS  
 40 183.745. All sums collected as penalties under this subsection shall be applied and paid over as  
 41 provided in ORS 653.256 (4).

42 **SECTION 14.** ORS 653.606 is amended to read:

43 653.606. (1)(a) Employers that employ at least 10 employees working anywhere in this state shall  
 44 implement a sick time policy that allows an employee to accrue at least one hour of paid sick time  
 45 for every 30 hours the employee works or 1-1/3 hours for every 40 hours the employee works. Em-

1 employers may limit the number of hours of paid sick time that employees may accrue to 40 hours per  
 2 year.

3 (b) Employers that employ fewer than 10 employees working anywhere in this state shall im-  
 4 plement a sick time policy that allows an employee to accrue at least one hour of unpaid sick time  
 5 for every 30 hours the employee works or 1-1/3 hours for every 40 hours the employee works. Em-  
 6 ployers may limit the number of hours of unpaid sick time that employees may accrue to 40 hours  
 7 per year.

8 (c) Employers that employ at least 10 employees working anywhere in this state and front-load  
 9 for employees at least 40 hours of paid sick time or paid time off at the beginning of each year used  
 10 to calculate the accrual and usage of sick time or time off need not comply with subsections (1)(a)  
 11 and (3) of this section.

12 (d) Employers that employ fewer than 10 employees working anywhere in this state and front-  
 13 load for employees at least 40 hours of unpaid sick time or unpaid time off at the beginning of each  
 14 year used to calculate the accrual and usage of sick time or time off need not comply with sub-  
 15 sections (1)(b) and (3) of this section.

16 (2)(a) The number of employees employed by an employer shall be ascertained by determining  
 17 that the per-day average number of employees is 10 or greater for each of 20 workweeks in the  
 18 calendar year or the fiscal year of the employer immediately preceding the year in which the leave  
 19 is to be taken.

20 (b) If the business of the employer was not in existence for the entire year preceding the de-  
 21 termination made under paragraph (a) of this subsection, the number of employees shall be based  
 22 on any 20 workweeks preceding the request for sick time, which may include workweeks in the  
 23 current year, the preceding year or a combination of workweeks in the current year and the pre-  
 24 ceding year.

25 (c) As used in this subsection, “employee” does not include an individual or the parent, spouse  
 26 or child of an individual who is:

27 (A) A director of a corporation who has a substantial ownership interest in the corporation;

28 (B) A member of a limited liability company who has:

29 (i) A right to vote on or consent to any matter submitted to a vote or requiring the consent of  
 30 the members of the limited liability company; and

31 (ii) A substantial ownership interest in the limited liability company;

32 (C) A partner of a limited liability partnership who has a substantial ownership interest in the  
 33 limited liability partnership; or

34 (D) A sole proprietor of a business.

35 (d) As used in paragraph (c) of this subsection, “substantial ownership interest” means a per-  
 36 centage of ownership equal to or greater than the average percentage of ownership of all owners,  
 37 but not less than 15 percent.

38 (3) An employee shall begin to earn and accrue sick time on the first day of employment with  
 39 an employer. The employee may carry over up to 40 hours of unused sick time from one year to a  
 40 subsequent year. However, an employer:

41 (a) May adopt a policy that limits an employee to accruing no more than 80 total hours of sick  
 42 time; and

43 (b) May adopt a policy that limits an employee to using no more than 40 hours of sick time in  
 44 a year.

45 (4)(a) An employer is not required to carry over unused sick time if, by mutual consent, the

1 employer and an employee agree that:

2 (A) If the employer has 10 or more employees working anywhere in this state, the employee will  
3 be paid for all unused paid sick time at the end of the year in which the sick time is accrued and  
4 the employer will credit the employee with an amount of paid sick time that meets the requirements  
5 of this section on the first day of the immediately subsequent year; or

6 (B) If the employer has fewer than 10 employees working anywhere in this state, the employer  
7 will credit the employee with an amount of sick time that meets the requirements of this section  
8 on the first day of the immediately subsequent year.

9 (b) The Commissioner of the Bureau of Labor and Industries shall adopt rules for the determi-  
10 nation of the number of employees employed by an employer.

11 (5)(a) An employee is eligible to use sick time beginning on the 91st calendar day of employment  
12 with the employer and may use sick time as it is accrued.

13 (b) An employer may authorize an employee to use accrued sick time prior to the 91st calendar  
14 day of employment.

15 (c)(A) An employer that employs 10 or more employees working anywhere in this state shall pay  
16 an employee for accrued sick time used at the regular rate of pay of the employee.

17 (B) For an employee who is paid on a commission or piece-rate basis by an employer that em-  
18 ploys 10 or more employees working anywhere in this state, the employer shall pay the employee  
19 for accrued sick time used at a rate equal to at least the minimum wage specified in ORS 653.025  
20 **or section 2 of this 2023 Act, as applicable.**

21 (C) For an employee who is paid an hourly, weekly or monthly wage and is also paid on a  
22 piece-rate or commission basis by an employer that employs 10 or more employees working any-  
23 where in this state, the employer shall pay the employee for accrued sick time used at a rate  
24 equivalent to the employee's hourly, weekly or monthly wage or equal to the minimum wage speci-  
25 fied in ORS 653.025, **or, as applicable, the minimum wage specified in section 2 of this 2023**  
26 **Act**, whichever is greater.

27 (6) An employee who is exempt from overtime requirements under 29 U.S.C. 213(a)(1) of the  
28 federal Fair Labor Standards Act of 1938 is presumed to work 40 hours in each workweek for the  
29 purpose of accrual of sick time unless the actual workweek of the employee is less than 40 hours,  
30 in which case sick time accrues based on the actual workweek of the employee.

31 (7) Nothing in ORS 653.601 to 653.661 requires an employer to compensate an employee for ac-  
32 crued unused sick time upon the employee's termination, resignation, retirement or other separation  
33 from employment.

34 (8) An employer may not require an employee to:

35 (a) Search for or find a replacement worker as a condition of the employee's use of accrued sick  
36 time; or

37 (b) Work an alternate shift to make up for the use of sick time.

38 (9) Upon mutual consent by the employee and the employer, an employee may work additional  
39 hours or shifts to compensate for hours or shifts during which the employee was absent from work  
40 without using accrued sick time for the hours or shifts missed. However, the employer may not  
41 require the employee to work additional hours or shifts authorized by this subsection. If the em-  
42 ployee works additional hours or shifts, the employer must comply with any applicable federal, state  
43 or local laws regarding overtime pay.

44 (10) An employee retains accrued sick time if the employer sells, transfers or otherwise assigns  
45 the business or an interest in the business to another employer.

1 (11)(a) An employer shall restore previously accrued unused sick time to an employee who is  
2 reemployed by that employer within 180 days of separation from employment with the employer.

3 (b) If an employee leaves employment with an employer before the 91st day of employment and  
4 subsequently is reemployed by that employer within 180 days of separation from employment, the  
5 employer shall restore the accrued sick time balance the employee had when the employee left the  
6 employment of the employer and the employee may use accrued sick time after the combined total  
7 of days of employment with the employer exceeds 90 calendar days.

8 (12) If an employee is transferred to a separate division, entity or location of the employer but  
9 remains employed by that same employer, the employee is entitled to use all sick time accrued while  
10 working at the former division, entity or location of the employer and is entitled to retain or use  
11 all sick time as provided by ORS 653.601 to 653.661.

12 (13) Employers located in a city with a population exceeding 500,000 shall comply with ORS  
13 653.601 to 653.661, except that:

14 (a) If an employer located in a city with a population exceeding 500,000 employs at least six  
15 employees working anywhere in this state, the employer shall implement a policy consistent with  
16 this section as it applies to employers with at least 10 employees working anywhere in this state.

17 (b) If an employer located in a city with a population exceeding 500,000 employs fewer than six  
18 employees working anywhere in this state, the employer shall implement a policy consistent with  
19 this section as it applies to employers with fewer than 10 employees working anywhere in this state.

20 **SECTION 15. Section 2 of this 2023 Act and the amendments to ORS 137.103, 315.262,**  
21 **464.250, 653.010, 653.020, 653.025, 653.030, 653.033, 653.035, 653.070, 653.261 and 653.606 by**  
22 **sections 3 to 14 of this 2023 Act become operative on January 1, 2024.**

23 **SECTION 16. This 2023 Act takes effect on the 91st day after the date on which the 2023**  
24 **regular session of the Eighty-second Legislative Assembly adjourns sine die.**

25



## HOUSE OF REPRESENTATIVES

Office of Rep. Mark Gamba: HD 41: Milwaukie  
[Rep.MarkGamba@oregonlegislature.gov](mailto:Rep.MarkGamba@oregonlegislature.gov)  
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# Houseable Wage

<b>Overview</b>	Link Oregon's minimum wage to the average rent for a one-bedroom apartment in a given region so that no full-time worker must spend more than 30% of their income on housing costs.
<b>Problem</b>	Roughly two thousand working Oregonians are being evicted every month, most of them due to inability to make the rent. This is a primary cause of homelessness. Housing is by far the largest single expense facing all but the wealthiest Oregon families. At the same time, wages in Oregon had stagnated for decades before the \$15 Now movement and are still lagging further and further behind the cost of living. In Oregon, more than 44% of renter households are rent-burdened and half those spend literally 50% or more of their total income on rent alone. Furthermore, the US Census tells us that more than half of Oregonians currently make significantly less than a livable wage. We know that for a household to be financially stable, they should not be spending more than 30% of their take-home pay on housing. In Portland, a full-time worker would need to make \$29/hour to meet that threshold. No one, anywhere in the state, can afford the average one bedroom apartment at the current minimum wage. One result of this is that the the state is spending millions of tax dollars on programs to keep low wage workers barely surviving. Simultaneously many companies that pay those low wages are making record profits.
<b>Solution</b>	At one end of the spectrum, we must dramatically ramp up housing production, which has its own limitations and is unlikely to keep up with demand. At the other end of the spectrum, we must raise stagnant wages. The Houseable Wage concept does this by tying Oregon's minimum wage to the average cost to rent a one-bedroom apartment in a given region and phases in over a number of years. This guarantees that <i>anyone</i> working full time will earn enough to afford housing in their community.
<b>Workgroup</b>	It will take the pressure of thousands of Oregonians calling on their legislators if we are to get this bold concept passed into law. We are building a broad coalition to do just that and are planning to introduce the legislation in the 2025 session. If you care about this issue, join us!

# D R A F T

## SUMMARY

Digest: Allows cities and counties to impose rent control. The Act goes into effect when the Governor signs it. (Flesch Readability Score: 70.8).

Repeals the prohibition on local rent control. Declares emergency, effective on passage.

## A BILL FOR AN ACT

1  
2 Relating to local rent control; amending ORS 197A.465 and section 9, chapter  
3 552, Oregon Laws 2021; repealing ORS 91.225; and declaring an emergency.

4 **Be It Enacted by the People of the State of Oregon:**

5 **SECTION 1. ORS 91.225 is repealed.**

6 **SECTION 2.** ORS 197A.465 is amended to read:

7 197A.465. (1) As used in this section:

8 (a) “Affordable housing” means housing that is affordable to households  
9 with incomes equal to or higher than 80 percent of the median family income  
10 for the county in which the housing is built.

11 (b) “Multifamily structure” means a structure that contains three or more  
12 housing units sharing at least one wall, floor or ceiling surface in common  
13 with another unit within the same structure.

14 (2) Except as provided in subsection (3) of this section, a metropolitan  
15 service district may not adopt a land use regulation or functional plan pro-  
16 vision, or impose as a condition for approving a permit under ORS 215.427  
17 or 227.178 a requirement, that has the effect of establishing the sales or  
18 rental price for a housing unit or residential building lot or parcel, or that  
19 requires a housing unit or residential building lot or parcel to be designated  
20 for sale or rent to a particular class or group of purchasers or renters.

**NOTE:** Matter in **boldfaced** type in an amended section is new; matter *[italic and bracketed]* is existing law to be omitted. New sections are in **boldfaced** type.

1 (3) The provisions of subsection (2) of this section do not limit the au-  
2 thority of a metropolitan service district to:

3 (a) Adopt or enforce a use regulation, provision or requirement creating  
4 or implementing an incentive, contract commitment, density bonus or other  
5 voluntary regulation, provision or requirement designed to increase the sup-  
6 ply of moderate or lower cost housing units; or

7 (b) Enter into an affordable housing covenant as provided in ORS 456.270  
8 to 456.295.

9 (4) [*Notwithstanding ORS 91.225,*] A city or county may adopt a land use  
10 regulation or functional plan provision, or impose as a condition for ap-  
11 proving a permit under ORS 215.427 or 227.178 a requirement, that has the  
12 effect of establishing the sales or rental price for a new multifamily struc-  
13 ture, or that requires a new multifamily structure to be designated for sale  
14 or rent as affordable housing.

15 (5) A regulation, provision or requirement adopted or imposed under  
16 subsection (4) of this section:

17 (a) May not require more than 20 percent of housing units within a  
18 multifamily structure to be sold or rented as affordable housing.

19 (b) May apply only to multifamily structures containing at least 20  
20 housing units.

21 (c) Must provide developers the option to pay an in-lieu fee, in an amount  
22 determined by the city or county, in exchange for providing the requisite  
23 number of housing units within the multifamily structure to be sold or  
24 rented at below-market rates.

25 (d) Must require the city or county to offer a developer of multifamily  
26 structures, other than a developer that elects to pay an in-lieu fee pursuant  
27 to paragraph (c) of this subsection, at least one of the following incentives:

28 (A) Whole or partial fee waivers or reductions.

29 (B) Whole or partial waivers of system development charges or impact  
30 fees set by the city or county.

31 (C) Finance-based incentives.

1 (D) Full or partial exemption from ad valorem property taxes on the terms  
2 described in this subparagraph. For purposes of any statute granting a full  
3 or partial exemption from ad valorem property taxes that uses a definition  
4 of “low income” to mean income at or below 60 percent of the area median  
5 income and for which the multifamily structure is otherwise eligible, the city  
6 or county shall allow the multifamily structure of the developer to qualify  
7 using a definition of “low income” to mean income at or below 80 percent  
8 of the area median income.

9 (e) Does not apply to a CCRC, as defined in ORS 101.020, that executes  
10 and records a covenant with the applicable city or county in which the  
11 CCRC agrees to operate all units within its structure as a CCRC. Units  
12 within a CCRC that are offered or converted into residential units that are  
13 for sale or rent and are not subject to ORS chapter 101 must comply with  
14 regulations, provisions or requirements adopted by the city or county that  
15 are consistent with those applicable to a new multifamily structure under  
16 subsection (3) or (4) of this section.

17 (6) A regulation, provision or requirement adopted or imposed under  
18 subsection (4) of this section may offer developers one or more of the fol-  
19 lowing incentives:

20 (a) Density adjustments.

21 (b) Expedited service for local permitting processes.

22 (c) Modification of height, floor area or other site-specific requirements.

23 (d) Other incentives as determined by the city or county.

24 (7) Subsection (4) of this section does not restrict the authority of a city  
25 or county to offer developers voluntary incentives, including incentives to:

26 (a) Increase the number of affordable housing units in a development.

27 (b) Decrease the sale or rental price of affordable housing units in a de-  
28 velopment.

29 (c) Build affordable housing units that are affordable to households with  
30 incomes equal to or lower than 80 percent of the median family income for  
31 the county in which the housing is built.



1 (8)(a) A city or county that adopts or imposes a regulation, provision or  
2 requirement described in subsection (4) of this section may not apply the  
3 regulation, provision or requirement to any multifamily structure for which  
4 an application for a permit, as defined in ORS 215.402 or 227.160, has been  
5 submitted as provided in ORS 215.416 or 227.178 (3), or, if such a permit is  
6 not required, a building permit application has been submitted to the city  
7 or county prior to the effective date of the regulation, provision or require-  
8 ment.

9 (b) If a multifamily structure described in paragraph (a) of this subsection  
10 has not been completed within the period required by the permit issued by  
11 the city or county, the developer of the multifamily structure shall resubmit  
12 an application for a permit, as defined in ORS 215.402 or 227.160, as provided  
13 in ORS 215.416 or 227.178 (3), or, if such a permit is not required, a building  
14 permit application under the regulation, provision or requirement adopted  
15 by the city or county under subsection (4) of this section.

16 (9)(a) A city or county that adopts or imposes a regulation, provision or  
17 requirement under subsection (4) of this section shall adopt and apply only  
18 clear and objective standards, conditions and procedures regulating the de-  
19 velopment of affordable housing units within its jurisdiction. The standards,  
20 conditions and procedures may not have the effect, either individually or  
21 cumulatively, of discouraging development of affordable housing units  
22 through unreasonable cost or delay.

23 (b) Paragraph (a) of this subsection does not apply to:

24 (A) An application or permit for residential development in an area  
25 identified in a formally adopted central city plan, or a regional center as  
26 defined by Metro, in a city with a population of 500,000 or more.

27 (B) An application or permit for residential development in historic areas  
28 designated for protection under a land use planning goal protecting historic  
29 areas.

30 (c) In addition to an approval process for affordable housing based on  
31 clear and objective standards, conditions and procedures as provided in par-

1 agraph (a) of this subsection, a city or county may adopt and apply an al-  
2 ternative approval process for applications and permits for residential  
3 development based on approval criteria regulating, in whole or in part, ap-  
4 pearance or aesthetics that are not clear and objective if:

5 (A) The developer retains the option of proceeding under the approval  
6 process that meets the requirements of paragraph (a) of this subsection;

7 (B) The approval criteria for the alternative approval process comply with  
8 applicable statewide land use planning goals and rules; and

9 (C) The approval criteria for the alternative approval process authorize  
10 a density at or above the density level authorized in the zone under the ap-  
11 proval process provided in paragraph (a) of this subsection.

12 (10) If a regulation, provision or requirement adopted or imposed by a city  
13 or county under subsection (4) of this section requires that a percentage of  
14 housing units in a new multifamily structure be designated as affordable  
15 housing, any incentives offered under subsection (5)(d) or (6) of this section  
16 shall be related in a manner determined by the city or county to the required  
17 percentage of affordable housing units.

18 **SECTION 3.** Section 9, chapter 552, Oregon Laws 2021, as amended by  
19 section 104, chapter 13, Oregon Laws 2023, is amended to read:

20 **Sec. 9.** (1) Notwithstanding ORS 197.250 or 197.612 or any statewide land  
21 use planning goal, the Department of Land Conservation and Development  
22 shall approve Stevens Road planning amendments provided the department  
23 determines, in its discretion, that the Stevens Road planning amendments,  
24 with respect to the Stevens Road tract, include:

25 (a) An inventory of significant historical artifacts, cultural sites and na-  
26 tural resources.

27 (b) Areas designated for recreational and open space.

28 (c) Land use regulations for the protection and preservation of significant  
29 resources and designated areas identified in paragraphs (a) and (b) of this  
30 subsection.

31 (d) Land use regulations that comply with applicable wildfire planning

1 and development requirements, including requirements in regulations  
2 adopted to implement a statewide planning goal relating to natural disasters  
3 and hazards.

4 (e) Areas designated for adequate employment lands that account for the  
5 city's most recent economic opportunity analysis, including consideration of  
6 subsequent economic development activities and trends.

7 (f) Within areas zoned for residential purposes, without counting the  
8 lands designated under subsection (2) of this section, land use regulations for  
9 housing that:

10 (A) Ensure adequate opportunities for the development of all needed  
11 housing types, sizes and densities of market-rate housing, including middle  
12 housing as defined in ORS [197.758] **197A.420**;

13 (B) Exceed the proportions of single-family attached and multifamily  
14 housing called for in the city's most recently adopted housing needs analysis  
15 under ORS 197.296 (3) (2021 Edition);

16 (C) Exceed a minimum density standard of nine residential units per gross  
17 residential acre; and

18 (D) On the date the Stevens Road planning amendments are approved,  
19 comply with land use regulations adopted by the city, or any minimum ap-  
20 plicable rules adopted by the department, to implement ORS [197.758]  
21 **197A.420** and the amendments to ORS [197.312] **197A.395 and 197A.425** by  
22 section 7, chapter 639, Oregon Laws 2019.

23 (g) Sufficient areas designated for mixed use development to support and  
24 integrate viable commercial and residential uses along with transportation  
25 options, including walking, bicycling and transit use.

26 (h) Land use regulations ensuring that:

27 (A) Adequate capacity is available, or feasible with development, for wa-  
28 ter, sewer and storm water services; and

29 (B) Adequate consideration is given to the financing, scheduling and de-  
30 velopment of urban services, as defined in ORS 195.065.

31 (i) Land use regulations for transportation that:

1 (A) Ensure the development of adequate infrastructure to support walk-  
2 ing, bicycling, public transit and motor vehicle movement; and

3 (B) Give adequate consideration to transportation networks that connect  
4 the Stevens Road tract to other areas within the urban growth boundary of  
5 the city.

6 (j) The adequate consideration of the recommendations and comments re-  
7 ceived under section 8 (3) to (5), chapter 552, Oregon Laws 2021.

8 (2) The department may not approve the planning amendments under  
9 subsection (1) of this section unless the planning amendments designate at  
10 least 20 net acres of land to be:

11 (a) Restricted so the area may be zoned, planned, sited or developed only  
12 for residential housing units at a minimum density of nine residential units  
13 per gross acre;

14 (b) Conveyed to the city at a price per acre established under section 4  
15 (2)(b), chapter 552, Oregon Laws 2021; and

16 (c) Notwithstanding ORS [91.225 or 197.309] **197A.465**, preserved for a pe-  
17 riod of no less than 50 years as affordable to own or rent as follows:

18 (A) At least 12 net acres made affordable to:

19 (i) Households with incomes of 60 percent or less of the area median in-  
20 come, as defined in ORS 456.270; or

21 (ii) If part of an income-averaging program approved by the Housing and  
22 Community Services Department, households whose incomes average 60 per-  
23 cent or less of the area median income.

24 (B) At least six net acres:

25 (i) Made affordable to households with incomes of 80 percent or less of  
26 the area median income; and

27 (ii) Made available, to the extent permitted by law, in a manner that gives  
28 a priority to households in which at least one individual is employed by an  
29 education provider over other members of the public.

30 (C) At least two net acres in which at least 80 percent of the units in each  
31 contiguous development tract are made affordable to households with 80

1 percent or less of the area median income, of which at least one net acre is  
2 made available, to the extent permitted by law, in a manner that gives a  
3 priority to households in which at least one individual is employed by an  
4 education provider over other members of the public.

5 (3) Upon a partition or subdivision of the Stevens Road tract following  
6 the approval of the planning amendments under subsection (1) of this section  
7 establishing one or more lots or parcels described in subsection (2) of this  
8 section, the owner shall transfer those lots or parcels to the city. For a pe-  
9 riod of 99 years after the purchase of property under this section, if the city  
10 resells any lot or parcel, the city may recover only the city's costs of the  
11 purchase and resale of the property.

12 (4) Neither the city nor the Department of Land Conservation and De-  
13 velopment is obligated to adopt any specific findings or evaluate any specific  
14 criteria in exercising its discretion with respect to any Stevens Road plan-  
15 ning amendments under this section and may receive, solicit or consider in-  
16 formation from any source.

17 (5) As used in this section, "education provider" means a school district  
18 as defined in ORS 332.002, an educational program under the Youth Cor-  
19 rections Education Program or Juvenile Detention Education Program as  
20 both are defined in ORS 326.695, or an education service district as defined  
21 in ORS 334.003.

22 **SECTION 4. This 2024 Act being necessary for the immediate pres-**  
23 **ervation of the public peace, health and safety, an emergency is de-**  
24 **clared to exist, and this 2024 Act takes effect on its passage.**

25

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## What we need to build more housing

Every Oregonian deserves a home they can afford, that meets their family needs, and is well-located in a livable neighborhood near schools, stores, parks, transportation options, and more. Oregon is short approximately 140,000 homes for people who are living here today. [Most of the housing we're missing is for people with moderate and lower incomes](#). That means people going without appropriate housing in Oregon include medical technicians, mechanics, teachers, day-care providers, store clerks, care givers, young people just starting out, older people on fixed incomes, people experiencing homelessness, and more.

**We can meet the housing needs of Oregonians, and quickly. Here's how:**

### Invest in infrastructure for housing, especially housing for those of moderate and lower incomes

Oregon's cities already have tens of thousands of acres designated for residential use inside their UGBs, but the lands lack some or all infrastructure – roads, sewers, water, sidewalks. Investing in these lands is the most important step the state can take now to unlock large parcels and get them “shovel-ready” to quickly produce housing.

Our housing *underproduction* is even more dramatically skewed: Ninety-five percent of the current housing underproduction is impacting people with moderate and lower incomes. Affordable housing providers often need relatively small amounts of financial assistance to extend a sewer line, build a sidewalk, provide access to a parcel, or consolidate land and then they can do what they do best – build many units of housing for those who need it most.

### Incentivize housing production on the lands and buildings we already have

Oregon has great redevelopment opportunities that need relatively small infrastructure upgrades to bring thousands of homes online, including affordable homes, well-located near stores, schools, and transit. This includes the thousands of homes planned for areas like Lloyd Center and the Broadway Corridor in Portland, the Core Area in Bend, and underused parking lots and commercial lands and buildings in almost every city and town. Many of these are in great locations to redevelop with housing. Now, there's even [federal funding](#) to help, which can be combined with state and local investments to produce even more housing while revitalizing buildings and neighborhoods

## Invest inside current UGBs, to build more housing, faster

Spending limited infrastructure dollars goes farther and faster inside UGBs to produce more houses than spending those dollars in a UGB expansion. Residential lands inside UGBs are often closer to existing infrastructure or have some of the infrastructure in place, but need just a bit more. This means less cost and less time to get more homes on the ground than through a UGB expansion.

## Use OHNA to achieve better housing results, sooner

The state legislature directed the Department of Land Conservation and Development and other state agencies to quickly enact the Oregon Housing Needs Analysis program, and it's already underway. OHNA requires every city, working with the state, to adopt zoning; streamline UGB expansions, urban reserves, and land swaps; and enact other measures to ensure diverse housing meeting the needs of all residents is actually built. When the OHNA program fully kicks in in 2025 and 2026, many cities will be implementing their housing production strategies and will be able to use quicker, streamlined land use processes.

## What won't help produce the housing Oregonians need

### **Overriding land use and environmental laws will not produce the housing Oregonians need, where they need it, anytime soon**

Sidestepping land use laws to expand UGBs to build primarily private-sector, higher income housing will take many years to build, will not result in many homes, and will not provide the housing Oregonians need. It puts more people farther away from the services, stores, and jobs they need, and makes affordable *living* even more unattainable. Trickle down housing doesn't work.

### **Lands inside current UGBs should not have to compete with UGB expansions for scarce infrastructure dollars**

Adding more land, when so many cities need investments in the lands they already have, exacerbates existing infrastructure funding gaps and fails to make the most of the land we have. It is not a responsible use of Oregon's resources.

### **Building at the edge increases climate change and wildfire risks to lives, livelihoods, and homes**

Homes at the edge are farther away from schools, stores, and jobs and therefore require more roads and driving, resulting in more greenhouse gas emissions, heat islands, and stormwater runoff that ends up in rivers and streams. It paves over carbon sequestering farm lands and natural areas.

In many areas of Oregon, expanding the urban footprint means developing into the wildland urban interface. This puts more lives, livelihoods, and homes at risk of wildfire – and it increases the likelihood that more catastrophic wildfires will occur.

### **Building at the edge exacerbates inequality and racial and economic injustice**

Housing policies and investments should open up existing neighborhoods to those who have been racially redlined and economically excluded from areas of opportunity: those of lower incomes, people of color, Black people, indigenous people, and those on fixed incomes. Those who cannot or choose not to drive a car also deserve well-located housing choices inside UGBs.

# Summary of Working Draft LC 19

## HAPO, Land Use Adjustments, Urban Growth Boundary expansions, and appropriations for housing production including Middle-Income Housing

For Housing Oregon members, written by Brian Hoop

January 4, 2023

The working draft of LC 19 (Legislative Concept) was provided by staff from the Governor's Office to Housing Oregon on dates listed below.

### Part 1 - Housing Accountability and Production Office

Dated Dec 15, 2023, Emailed Dec. 21, 2023

- DLCD and DCBS will run the Housing Accountability and Production Office.
- **Main purpose:**
  - Provide technical assistance to local governments.
  - Comply with housing laws.
  - Reduce permitting and land use barriers to housing production.
  - Support reliable and effective implementation of local procedures and standards relating to the approval of residential development projects.
- **Who can file complaints** - Responding to violations of housing laws:
  - For complaints related to specific developments – may receive complaints only from residential developer of the project.
  - For complaints not related to a specific development – may receive complaints from any person.
- **Investigations** - Describes procedures for investigating and responding to complaints and/or violations. Details enforcement orders.
- **Reporting** – Produce a report identifying improvements in the local building plan approval, land use, zoning and permitting processes.
- **Infrastructure support** – Deletes section assigning infrastructure support to HAPO. **Primary lead is Oregon Infrastructure Finance Authority, I think.**



## Part 2 – Land Use Adjustments

Dated Dec 15, 2023, Emailed Dec. 21, 2023

- **Allowable adjustments** - Lists what is and is not allowed as adjustments or deviation from an existing land use regulation.
- **Conditions to be met** - Lists conditions to be met in order for a local government to grant a request for an application to develop housing.
- **Application Criteria** - Lists criteria the application must meet such as:
  - Enable housing development that is not otherwise feasible due to cost or delay resulting from the unadjusted land use regulation.
  - Enable housing development that reduces the sale or rental prices per residential unit.
  - Increases the number of housing units within the application.
  - All units are subject to an affordable housing covenant:
    - Making them affordable to moderate income households for minimum or 30 years, or,
    - At least 20 % of units are affordable to low-income households for a minimum of 60 years.
  - Outlines development standards local governments shall grant adjustments such as:
    - Setbacks
    - Landscaped or open areas
    - Parking minimums
    - Lot sizes
    - Lot coverage
    - Unit density maximums
    - Prohibitions against ground floor uses including uses such as day care, and more.
    - Bicycle parking
    - Building height maximums
    - Design standards such as façade materials and articulation
    - Garage door orientation
    - Window material and area
    - Building orientation
    - Building height transitions
    - Balconies and porches

- Recesses and offsets
- **Procedures for approval** - Outlines procedures and timeline for approval or denial of applications.
- **Appeals** - Deletes proposed section outlining appeal process to Land Use Board of Appeals.
- **Amendments** – Lists numerous amendments to ORS 215.427 relating to final action on permit or zone change application and ORS 227.178 relating to final action on certain applications required within 120 days.

### Part 3 – Urban Growth Boundaries

Dated Dec 15, 2023, Emailed Dec. 21, 2023

- **Cities outside of Metro** – Lists conditions under which cities outside of Metro may add sites within their UGB such as:
  - Cities with population greater than 25,000 does not exceed 150 net residential acres.
  - Cities with population less than 25,000 does not exceed 75 residential acres.
- **Cities within Metro UGB** – Lists conditions under which cities within the Metro UGB shall adopt amendments to Metro UGB resulting in 600 or less or 600 or more net residential acres.
- **Demonstration of need** – Lists conditions for which cities must demonstrate a need for additional land such as:
  - Need for affordable housing, based on having a greater percentage of extremely cost-burdened households than the State average, based on data from the US HUD.
- **Solicitation of applications** – City requirements for providing public notice.
- **Review of site applications** – City requirements for site application review process.
- **Conceptual plan and allowed housing types** – Outlines City requirements to create conceptual plans for sites larger than 15 net residential acres:
  - Must have a diversity of housing types and sizes including middle housing.
  - Density standards – still being considered as of Dec. 21, 2023.
  - Designation of open space lands and commercial uses.

- o Transportation network for cities with 5,000 or greater.
- o **Affordability** – require:
  - At least 30% of residential units subject to affordability restrictions...for at least 60 years:
    - **Rental** – Households with an income of 80% or less of AMI
    - **Homeownership** – Households with an income of 130% or less of AMI
  - Construction of affordable units has commenced before occupancy of the last 15% of market rate units.
  - City may require greater affordability requirements provided there are offsets to various development costs.
- o **DLCD and Metro approval** – Outlines procedures for departmental approval.
- o **Alternative land exchanges** – Outlines alternative means by which a city may exchange land to amend its UGB.

## [Part 4 – Financial Support for Housing Production](#)

Dated Dec. 22, 2023, Emailed Dec. 22, 2023

- **State agency lead** - Authorizes the Oregon Infrastructure Finance Authority to loan or grant funds to a municipality or housing authority to support transportation, water, wastewater, and stormwater infrastructure for housing.
  - o Comment - Governor's Office still confirming if this will cover funds provided to affordable, moderate or market rate developer for site-specific infrastructure.
- **Minimum densities** - Outlines minimum densities in order to be eligible for funding including:
  - o 20 units per acre within Metro UGB
  - o 10 units per acre elsewhere except 5 or 6 units per acre for a list of specific rural counties.

- **Affordability covenants** - Requires 30 year affordability for low or moderate income households.
- **Other state agencies' roles** - Other department roles include:
  - Housing Accountability and Production Office assists in developing requirements and evaluating applications.
  - Oregon Business Development Dept administers site cleanup and mitigation.
  - OHCS administers site acquisition.
- **Site cleanup and mitigation** - Outlines departmental role and criteria for eligibility for site cleanup and mitigation funding including minimum densities and affordability covenants.
- **Site acquisition** - Outlines departmental role and criteria for eligibility for site acquisition including minimum densities and affordability covenants.
- **Housing developers** - Each section includes applicant may partner with a housing developer to apply and receive such funding.
- **Climate Friendly Housing Program** - This section TBD
- **Moderate income financing** - Relates to House Bill 2980A from 2023.
- **Appropriations** - Outlines proposed funding appropriations for:
  - \$200,000,000 for moderate income financing
  - \$40,000,000 for site acquisition
  - \$10,000,000 for technical assistance grants
  - \$20,000,000 for climate energy
  - \$10,000,000 for site cleanup and mitigation
  - \$5,000,000 for local capacity and support

## **Part 6 – Land Use Review Procedures**

Dated Dec. 22, 2023, Emailed Dec 26, 2023

- Addition to ORS chapter 197A relating to Comprehensive Land Use Planning II.
- **Limited land use decisions** - Local governments shall amend their procedures in their land use planning regulations to allow applications for the development of

housing within an urban growth boundary to be processed as limited land use decisions.

- **Exemptions** - DLCD may approve hardship exemptions for local governments due to increased costs.

## Part 7 – Moderate-Income Housing Financing

Dated Dec. 27, 2023, Emailed Dec. 27, 2023

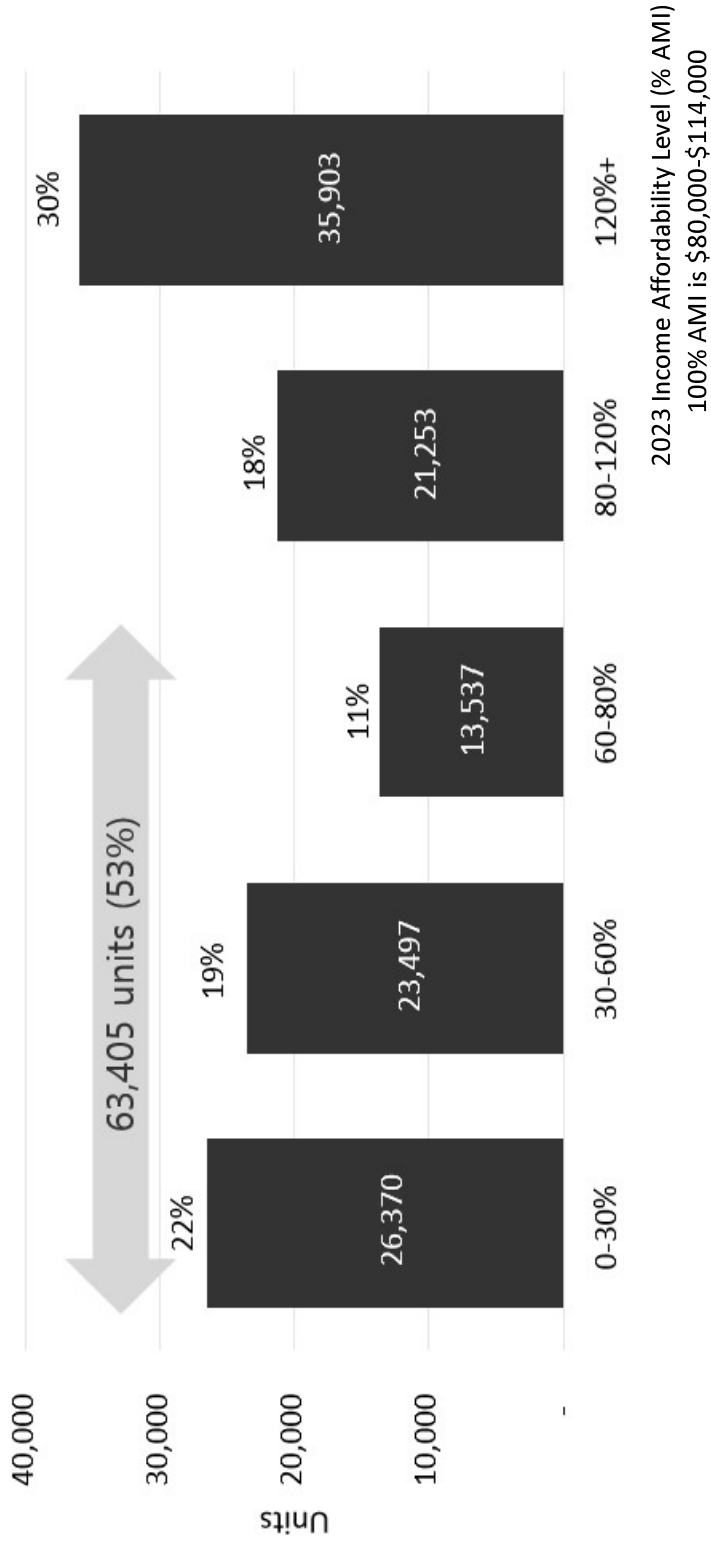
Relates to the proposed \$200,000,000 appropriation for moderate-income housing.

- **Definitions** - Provides many definitions including what are “eligible costs” and “eligible housing projects.” Eligible costs include:
  - System Development Charges
  - Predevelopment costs
  - Construction costs
  - Land write-downs
- **Sponsoring jurisdiction** - Section 2 outlines how a jurisdiction may adopt programs to award grants to developers for eligible costs.
  - **Timeline for grant awards** - May include reimbursement for eligible costs incurred for up to 12 months preceding the date on which the eligible housing project received local site approval.
- **Application process** - Section 3 outlines sponsoring jurisdiction’s and OHCS’ procedures for applications associated with grant programs.
  - **Timeline for reviews** - A review of applications shall be completed within 90 days of receipt of application, though local jurisdictions may extend that timeline.
  - **Loan period** - Term of loans shall not exceed 10 years.
  - Sponsoring jurisdictions forward provisionally approved applications to OHCS.
  - **OHCS’ role** - Outline’s OHCS’ review and approval process.
  - **Rejections and re-do’s** - Applicants may not appeal, but they can re-do.
- **Amount of tax assessments** - Section 4 outlines a County Tax Assessor’s role in determining the amount of property and other tax assessments.

- **OHCS' authority to loan funds** - Section 5 outlines OHCS' authority to develop a program to make loans to sponsoring jurisdictions to fund moderate-income housing grants.
- **Grant agreements** - Section 6 outlines key components of grant agreements sponsoring jurisdictions shall follow.
  - **Administration fees** - Sponsoring jurisdictions and county tax assessors are each reimbursed 1% of the loan for administration.
- **Tax exemptions or assessments** - Section 7 outlines County assessor's responsibilities related to exempting or assessing taxes.
- **Repayment of loans** - Section 8 outlines repayment of loans after completion of eligible housing projects funded by the grant.
- **Fees owed** - Section 9 outlines annual fees eligible housing project property owners exempted under Section 7 pay for the term of the loan.
  - **Amount of fee** - Outlines how first year's fee is determined and each subsequent year the amount of the fee shall be 103% of the preceding year's amount.
- **Liability for immediate payment** - Outlines developer's liability for immediate repayment of any outstanding annual fee if they haven't completed the project within 3 years following disbursement of the grant.
  - Lists other criteria for repayment such as willfully making false statements, in which case a penalty not to exceed 20% of the amount of the grant may be imposed.
- **Annual reporting** - Section 11 outlines responsibility of developer to submit a report on status of construction, itemized description of expenses, etc. Also outlines sponsoring jurisdictions annual reporting requirements.
- **Loan fund authorizing language** - Section 12 outlines authorizing language for establishing the Housing Project Revolving Loan Fund, which is separate and distinct from the General Fund.
- **OHCS appropriations** - Section 13 and 14 outline OHCS' responsibility to operate the loan fund, provide regional trainings and outreach to jurisdictional partners. Appropriates \$200,000,000 to OHCS to deposit into the Housing Project Revolving Loan Fund.

# Current Housing Need

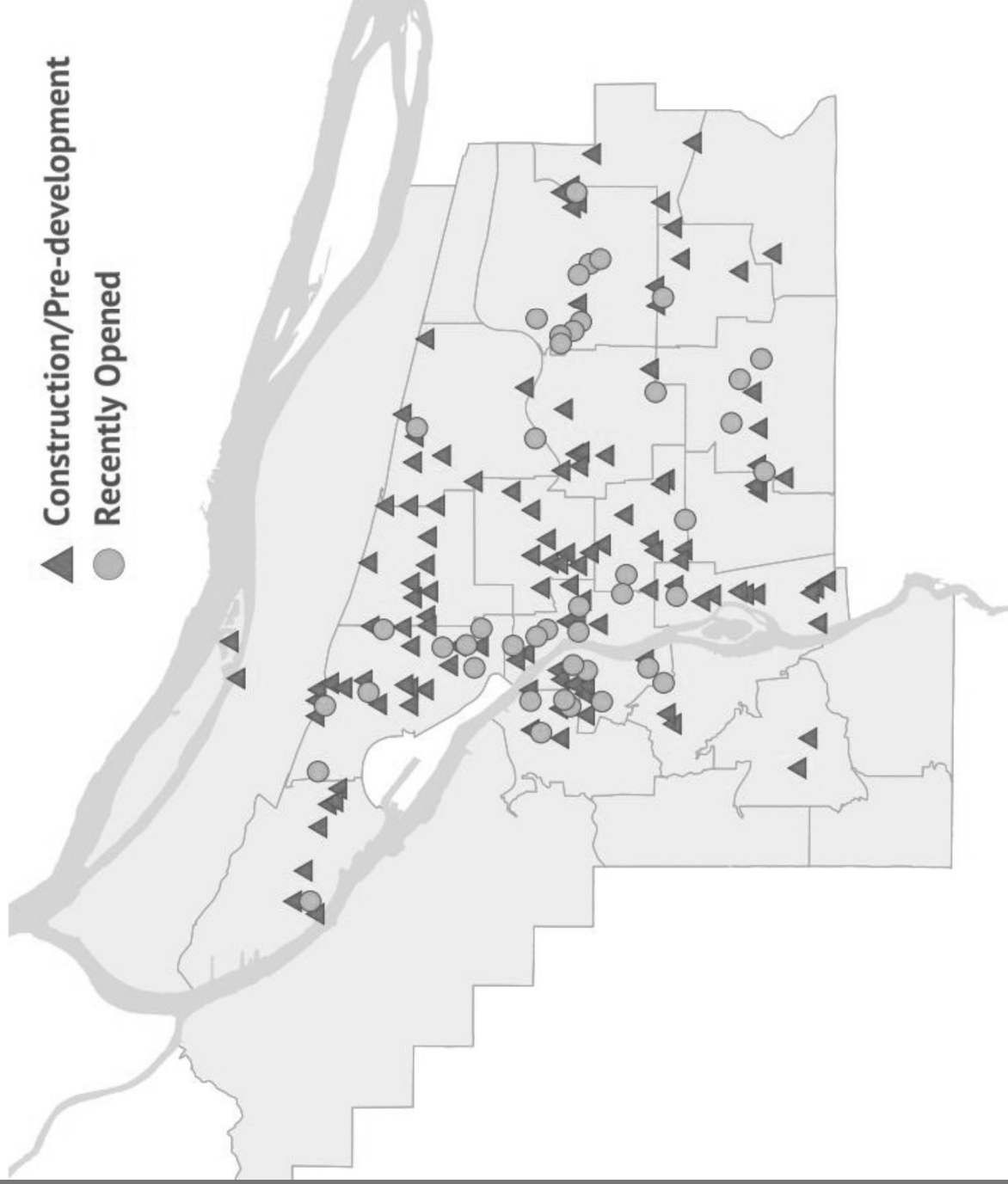
Over the next 20+ years, we will need over 60,000 affordable housing units and over 20,000 moderate income housing units.



# Rental Housing Production (2015 - 2023)

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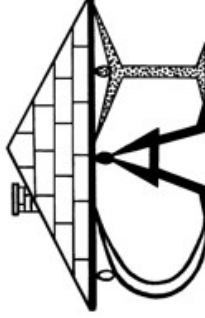
- 4,860+ affordable units opened
- 9,580+ people provided homes
- 3,900+ affordable units in development





# Rental Services Office

- Households provided legal services for housing access or stabilization  
1,440+ households per year
- Individuals provided landlord/tenant education, informational or referral services  
7,088 people per year
- Households provided in-depth housing stabilization services by community partners  
1,075 households per year



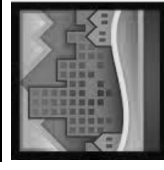
Urban League  
of Portland



INSPIRING HOPE. EMPOWERING INDEPENDENCE.  
Since 1966



ASIAN PACIFIC AMERICAN NETWORK OF OREGON

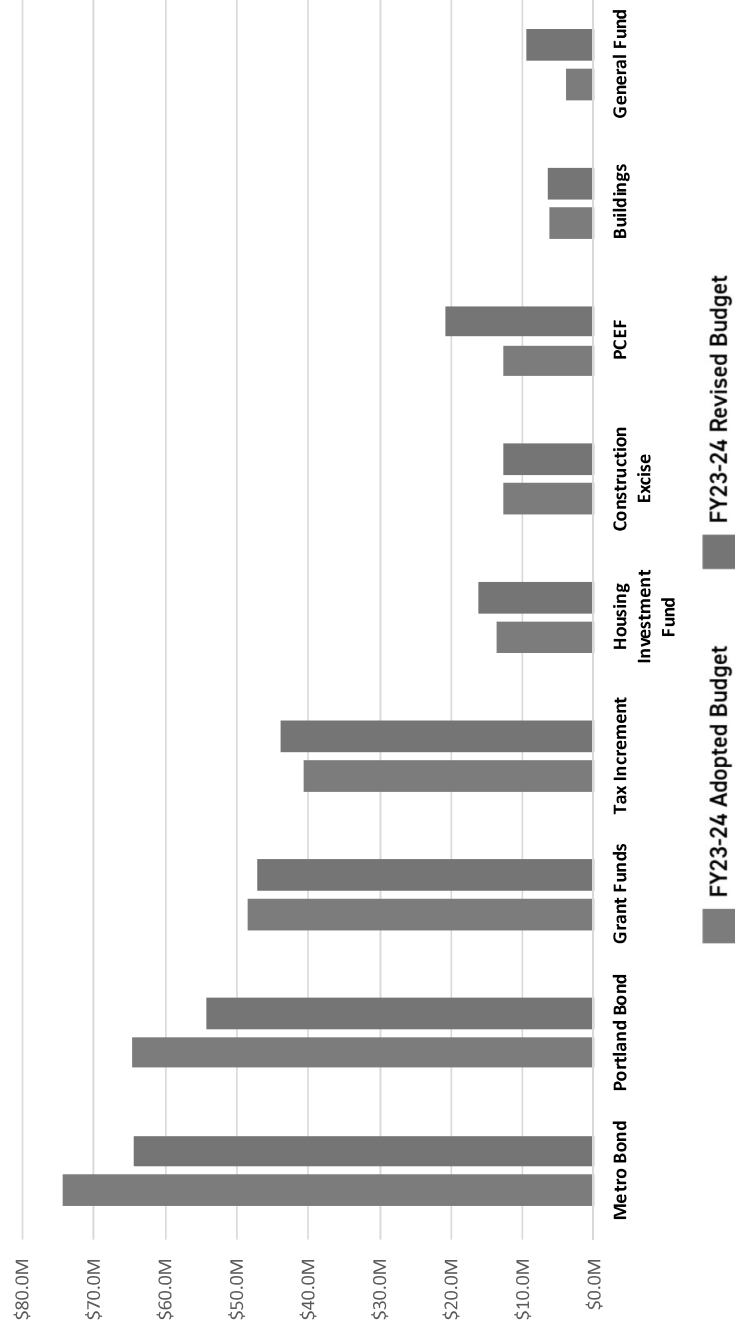


Bureau of  
Development  
Services  
FROM CONCEPT  
TO CONSTRUCTION

## FY23-24 Revised Budget

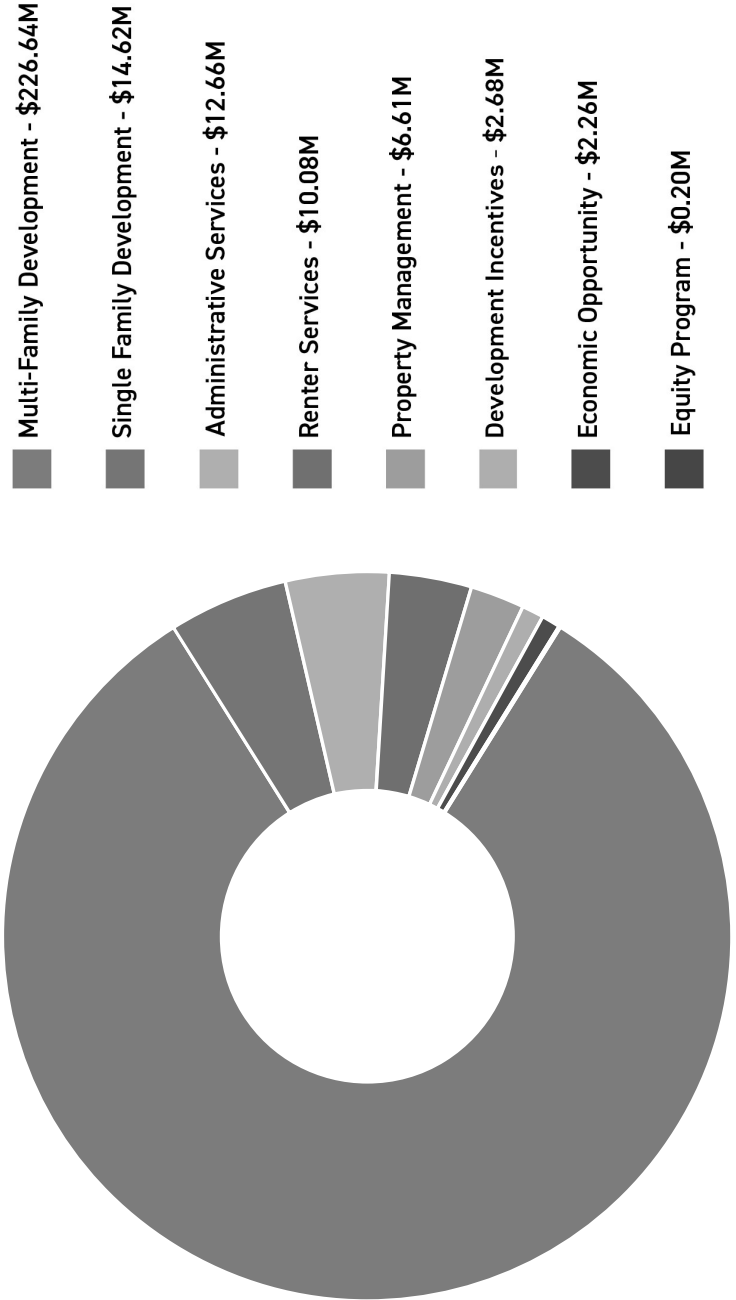
# Funding Sources **\$275,749,790**

FY 23-24 Adopted and Revised Budget - Sources

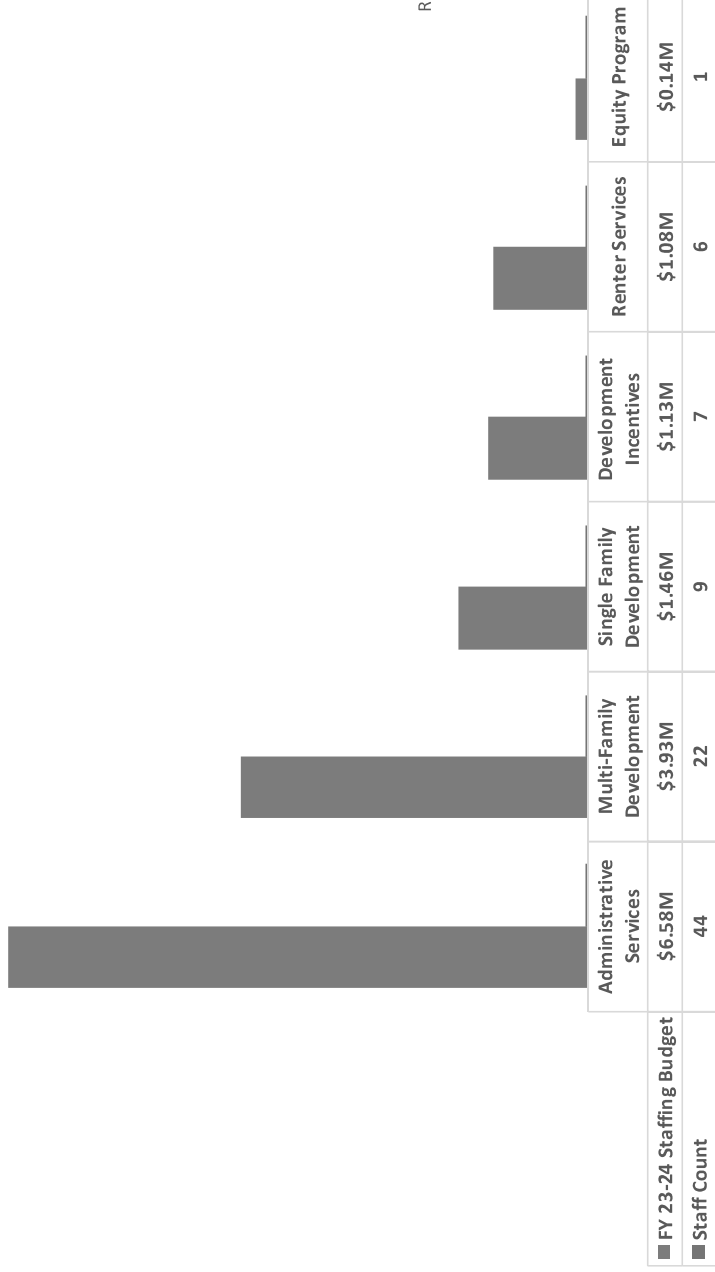


# FY23-24 Revised Budget by Program

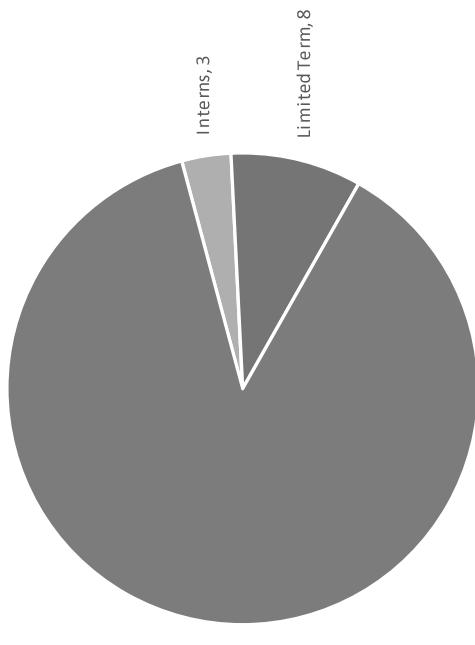
**Total: \$275,749,790**



# PHB Staffing Count and Budget – FY23-24



Staff Count by Position Type

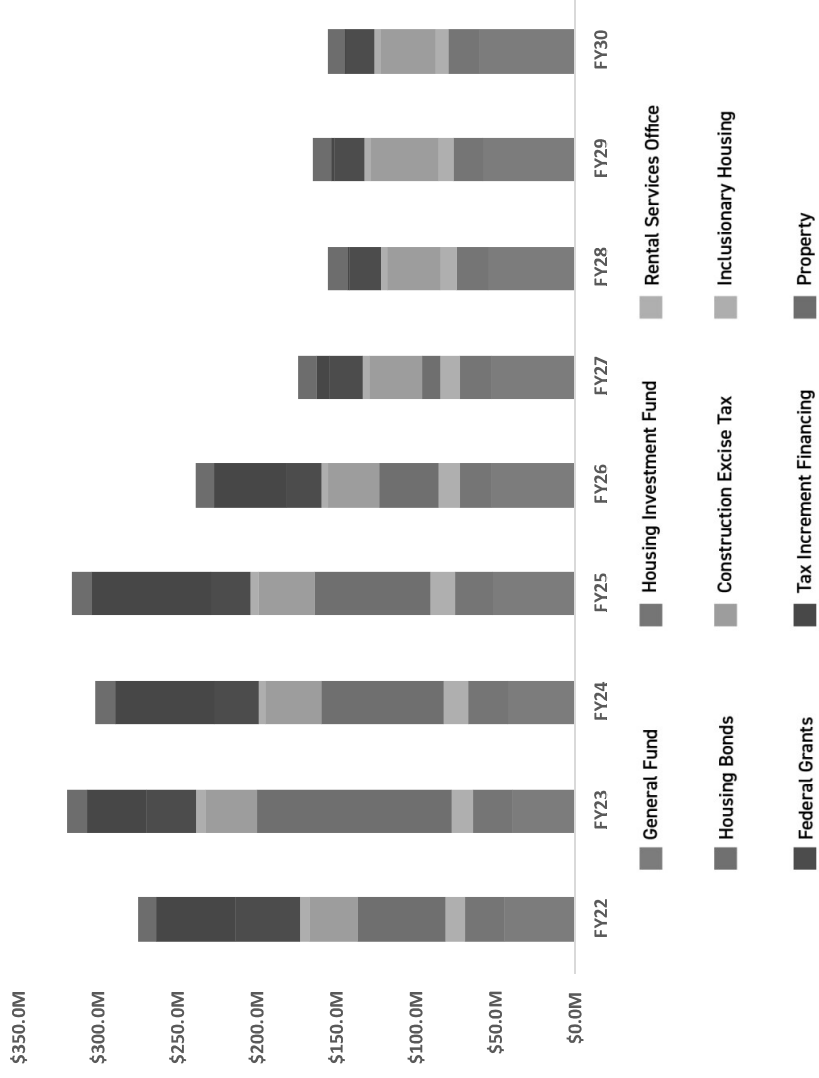


- PHB budgeted staffing cost for FY23-24 is \$14.32M
- The budget covers 89 positions.

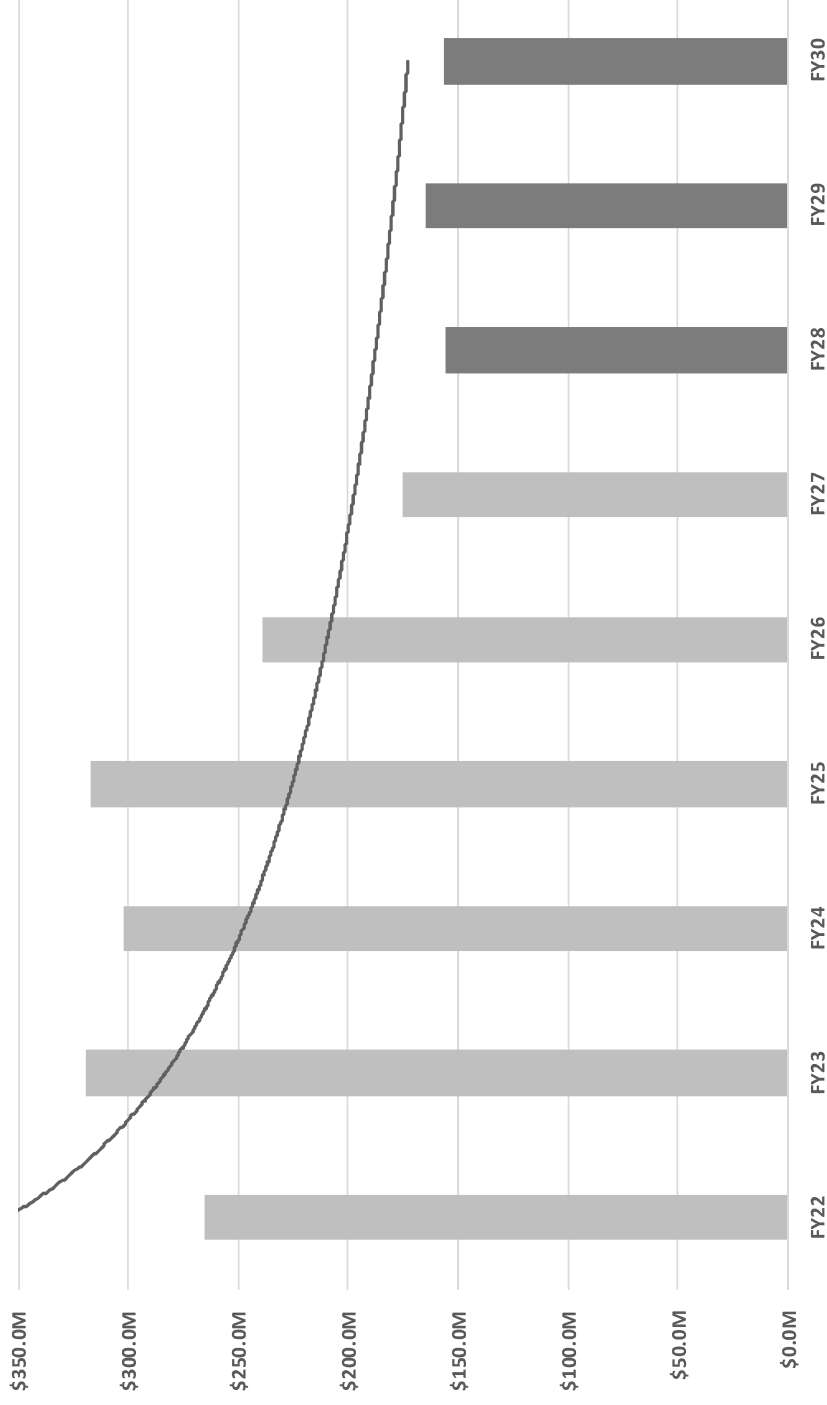
# Resource Challenge

## Affordable Housing Resource Challenge

- Historically Tax Increment Financing largest source
- Recent bond measures temporarily replaced TIF largest source
- Decline of bond revenue and TIF projected to co-occur



# Forecast Trend



# TIF Exploration

- In 2023, Council approved \$8 million - 25% of TIF returning to the City from expiring TIF districts - for the Housing Bureau's FY 2024-25 budget.
- Recent creation of the new Cully TIF district
- Exploration of potential new TIF districts in East Portland and Central City

**Central City**



**East Portland**



# Portland Clean Energy Fund

- The Portland Clean Energy Fund (PCEF) is a grant program administered through PHB to provide up to \$60 million over 5 years to regulated multifamily affordable housing projects located in the city of Portland.
- The goal of this program is to raise the bar on efficiency and renewable energy upgrades in new and redeveloped affordable housing projects serving low-income and other frontline communities.







**City of Portland, Oregon**  
**Bureau of Development Services**  
**Bureau Equity Committee**  
FROM CONCEPT TO CONSTRUCTION

Carmen Rubio, Commissioner  
David Kuhnhausen, Interim Director  
Phone: (503) 823-7300  
TTY: 711  
[www.portland.gov/bds](http://www.portland.gov/bds)

**Date:** January 10, 2024

**To:** BDS Budget Advisory Committee (BAC)  
Kyle O'Brien, BDS Budget & Finance Manager

**Cc:** Leesha Posey, BDS Equity & Policy Development Supervisor  
BEC Steering Committee

**From:** Megan Sita Walker, BDS Equity Committee  
Elysabeth Salazar, BDS Equity Committee  
Abbot Flatt, BDS Equity Committee

**BDS Bureau Equity Committee FY 2024-25 Budget Recommendations**

To our esteemed community representatives, industry representatives, and our colleague labor representatives on the BDS Budget Advisory Committee, we representatives from the BDS Equity Committee have developed the following recommendations we propose be adopted as a part of the BAC's FY 2024-25 Report to be produced following our third meeting on January 10, 2024.

These recommendations are drawn from topics discussed in the FY 2024-25 BAC's November and December 2023 meetings, and have been framed in consideration of City and BDS Racial Equity Plans, the FY 2024-25 BDS Director's Priorities Memo, discussions of the BDS Equity Committee, and the [City of Portland Core Values](#) of Anti-Racism, Equity, Transparency, Communication, Collaboration, and Fiscal Responsibility. Following these recommendations will help the Bureau stay true to the City's racial equity policies, maintain community trust, and keep momentum on current programs and initiatives during a time of change in Portland city government.

**1. The BEC recommends BDS fully fund the recently completed BDS Racial Equity Implementation Plan.**

The Bureau of Development Services recently completed a yearlong planning and visioning process throughout 2023 to develop its new Racial Equity Implementation plan (REIP), which trained dozens of staff and managers from every Division across the Bureau in the Results-Based Accountability for Racial Equity (RBA) methodology. With planning complete, work is beginning in 2024 and is visioned to carry through June 2025 at the end of FY 2024-25.

BDS is already encountering early headwinds to implementing this plan. Many staff who were involved in the planning process, including a disproportionate number of Black, Indigenous and people of color, and including half of the Bureau's Equity and Policy Development staff, have been laid off as of early January 2024. Many elements of the plan require outreach and collaboration between underserved customers, but the Bureau's Community Engagement Coordinator was also laid off. A major reorganization of the City's permitting bureaus is also pending, which will change the structure upon which the current plans were designed.

To ensure the BDS Racial Equity Implementation Plan (REIP), which includes policy changes, outreach, internal staff training, new programs, and related data collection, analysis, and reporting, is delivered, it must be properly resourced. The BEC recommends BDS identify, itemize, and fully fund all elements of the Bureau's Racial Equity Plan through FY 2024-25, including:

- Systemic Racism Inspectors Training
- Rental Unit Certification Program
- Equitable Developer Incentive and Award Program
- BIPOC Community Advisory Partners
- Cultivated Land Use Work Settings for Inclusivity
- Data infrastructure and progress coaching
- BIPOC-Centered Technology Redesign Piloting Program
- Identify, secure, and prioritize funding for staff positions necessary for delivery of the Racial Equity Implementation Plan

As the Bureau takes stock of what institutional capacity has been lost from recent layoffs, it must be prepared to close these gaps with appropriate hiring, training, and contracting. The BEC recommends the Bureau waives any self-imposed restrictions on expenditures directly related to the current REIP.

**2. The BEC recommends BDS study the impact of 2023-2024 BDS layoffs on racial equity and revise the Business Continuity Plan in response.**

The BEC requests budget allocation for a comprehensive study evaluating the impact of 2023-2024 bureau layoffs on the City's workforce and Racial Equity Goals. The goal of this action is to address inequitable impacts on BIPOC and underrepresented employees, rebuild trust, and reinforce community engagement to align service delivery goals with equity objectives.

The recent layoffs have raised concerns about fiscal responsibility, process, and understanding the effects on the BDS workforce, particularly in relation to the City's core values of Anti-Racism and Equity. A thorough examination is essential to ensure transparency, communication, accountability and prevent compromising racial equity objectives in favor of other service delivery goals that are more deliberately measured.

The BEC recommends this study specifically focus on:

1. Inequitable impacts on BIPOC and underrepresented employees.
2. Transparency and process issues in the layoff decisions.
3. Neglect of City Core Values and racial equity goals in favor of other service delivery priorities.
4. Impacts on employee trust, retention, succession planning, retraining, experience, and service delivery.
5. Specific cuts to the Equity and Policy Development team, staff involved in the development of Bureau Racial Equity Plans, and termination of programs specifically recommended by City Council and this Budget Advisory Committee, including community engagement and small business liaison positions.

6. Cuts to community engagement and damaged trust in relationships with labor organizations and advisory bodies, including the BDS Budget Advisory Committee.

The BEC recommends inclusion of evidence from previous layoff cycles in this study to understand long-term impacts and urges increased transparency in future layoff processes. Mass layoffs are inherently inequitable, when labor agreements cause cascading disruptions to junior staff, who are most likely to have been hired from recruitment and interview processes redesigned to account for racial equity. Mass layoffs are also inherently inefficient, through seniority bumping processes that create lost institutional knowledge and customer relationships, and lost productivity due to retraining. BDS layoffs are also resulting in these inequities and inefficiencies through disruptions to work groups through bumping in other City Bureaus.

The current financial situation of the Bureau was not created by an immediate and unforeseen worldwide financial crisis such as in 2007-2008 but has slowly manifested over the last five years. Major industry trends like interest rates identified as the cause of the current slowdown are not present among the Leading Indicators of BDS' Business Continuity Plan (BCP) that is supposed to identify financial stress. Since 2018, the Bureau drew down approximately \$50 million of financial reserves, while ostensibly following its own Business Continuity Plan designed to prevent major service disruptions. In late 2023 to early 2024, this guidance still ultimately resulted in rapid layoffs without a transparent communication to employees and the public, or a clear process to apply the City's own racial equity policies.

It is clear the BCP needs to be revised, not only to improve tracking of current macroeconomic conditions, but also defining how the Bureau should approach workforce reductions while also following City equity policies. The BEC notes that the current BCP was developed before recent adoption of Portland's Racial Equity Goals (2016) and City Core Values (2020). The BEC recommend the involvement of the BDS staff and appropriate staff committees to develop proposed policy changes in response to the study's findings. We believe that this study is crucial for fostering a more equitable work environment for City staff, rebuilding trust with the community, and maintaining capacity and continuity across business cycles that support the service needs of the development industry.

### **3. The BEC recommends reevaluation of BDS funding structure to improve stability and align programs with City racial equity policies.**

The BEC recommends City Council act on the perennial request of past BDS Directors and Budget Advisory Committees to redevelop the Bureau's financial structure to reduce vulnerability to fluctuating construction market conditions. Failure to address this issue undermines progress towards the City's racially equitable hiring and retention goals, as layoffs disproportionately impact non-supervisory and lower seniority staff. Bureau of Human Resources show that white City employees on average have 2 years more seniority than City employees who are Black, Indigenous and people of color. Increased staff turnover increases overall recruitment and training costs, counter to the City's core value of fiscal responsibility.

BDS' nearly complete reliance on fees for service, as evidenced by the recent layoffs of 15% of the Bureau's workforce in response to a drop in permit fee revenue, is presently threatening the ability to maintain capacity for service delivery, in the present and likely soon on the other side of the business cycle as development eventually increases. BDS' capacity to process permits expediently is critical to

meeting City and State goals for new affordable housing production, a key racial equity issue. In these ways, an unstable budget is a threat to internal and external racial equity goals.

This study should compare the current BDS funding structure to that of development review and permitting entities in similar cities, as well as investigate BDS' internal structure. programs that have significantly different approaches to service delivery and cost structure, such as general commercial construction permitting contrasted with Process Management and Facilities Permit Program, and general residential construction contrasted with Field Issuance Remodel. Different BDS workstreams and services also have different customer groups and different barriers to access; this information needs to be gathered and daylighted for racial equity analysis as an integral part of the Bureau's evaluation of its funding structure. The study and following policy changes implemented by the BDS Director and City Council should create an adjusted funding model that is more resilient across economic cycles, and fees that are intentionally aligned with costs for different service delivery.

#### **4. The BEC recommends BDS restore and expand community engagement staff positions and increase community engagement with budgeting decisions.**

In this budget cycle in beginning in Fall 2023, the BDS Budget & Finance Team collaborated with Equity & Policy Development Community Engagement Coordinator held an additional onboarding session in advance of the BDS Budget Advisory Committee's first full meeting to help increase community advisory members' familiarity with BDS responsibilities, business practices and current budgeting decisions. These improvements were made in response to community and advisory member feedback from participation in previous budget cycles, and the actions are driven by the City's core values of Anti-Racism, Equity and Transparency. The Community Engagement Coordinator, Small Business Liaison and other equity and policy development positions were recently cut as part of late 2023 – early 2024 BDS layoffs. Funding for these positions should be restored so BDS community engagement efforts can continue in furtherance of City racial equity goals.

The BEC recommends BDS review how other City Bureaus increase access to their budgeting process. For example, the Portland Housing Bureau Budget Advisory Committee holds hybrid meetings accessible in person at local community centers and advertised broadly for engagement in bureau communications to customer email lists. Recent improvements in community engagement would not have been possible without the hiring of BDS community engagement staff, which was an action recommended by previous years' Budget Advisory Committees. BDS' advisory committees are a key part of BDS engagement with Black, Indigenous and communities of color, and the BEC has recently aided efforts to increase representation on BDS advisory bodies.

The BEC recommends BDS establish more frequent engagement with its Budget Advisory Committee. An expanded meeting calendar would build familiarity throughout the fiscal calendar year and reduce the acute need for onboarding at the beginning of the annual budget process each fall. Year-round communication with advisory members would enable timely notification about current events relevant to the BDS budget, such as policy changes and financial forecasts. The BDS Budget Advisory Committee was provided no opportunity to review or advise on recent layoffs, which have been the most impactful single change event at BDS in the last 15 years. As recently as fall 2022, the FY 2023-24 Budget Advisory Committee was not consulted on the possibility of layoffs during the forthcoming budget cycle for their input. Year-round contact with the BAC, which already exists for other BDS community advisory bodies, would have provided a venue for public access and input in Spring and Summer 2023 as soon as layoffs became a possibility.

# Board Report

Community Alliance of Tenants

For the period ended December 31, 2023



**community** alliance  
**of tenants**

Prepared by

Tracy Baird, Interim Finance Director

Prepared on

January 22, 2024

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# Interim Finance Director commentary

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Dear Board of Directors,

This packet represents the summarized reports that reviewed in detail by the Finance Committee on Monday, January 22, 2024.

## Staffing and Program Work

We rehired coordinator and specialist staff in December and launched into the programmatic work.

At the beginning of January, two more coordinators were rehired and we directly hired the accounting manager position.

At this time, we are nearly staffed in accordance to the approved budget, which was based on our approved grant funding.

We are now in compliance with our funders and, now that staff has returned later than anticipated, are now working with the funders to rescope the deliverables and budgets. More to come next month.

## Accounts Payable

We continue negotiations for the repayment of past due balances. All other known bills are current.

## Contracting

We will need to contract in the coming years. We want a conversation with the board about a policy to give management flexibility to meet professional needs but also oversight to ensure the board is comfortable with the services being purchased. We suggest that future procurements, including MOUs, contractors or vendors be approved by the board when they are not specified in the budget or over \$10,000. This month we specifically need communication services.

## Wages

Most employees were rehired with a minimum of a 2% increase. We assume that there will be another proposed increase from the Union based on the Collective Bargaining Agreements. The budget may have room for an additional increase once cash flow issues have been resolved.

## Accounts Receivable

We are working with funders to perfect invoicing to expedite their payments. In the January, invoices will be sent on a regular schedule.

## Cash Flow

Increase in Personnel costs impacts cash flow, as does repayment of arrears bills. The need to spend money to receive money remains difficult, as all of our grants are reimbursement.

Unrestricted cash continues to be elusive and overall cash is not being replenished.

We have been awarded \$100,000 from Meyer Memorial Trust for General Support, which will help with our administrative burden, which is where our shortfall remains.

## Fundraising

Grant applications have gone out: other programmatic grants are being pursued for the following fiscal year.

General Support funds and Donor-Advised Funds are being sought, and we are working with a service called

Feathr to support the search.

We are currently scheduled to revise current grant budgets with our funders over the next three weeks, which may push out our funding into the fiscal year in order to meet deliverables.

Revenue strategies for unrestricted support is critical. In February, I'll produce a report reflecting our unrestricted costs and cash need to support business operations not covered with grants.

We need the Board and all hands to make light work of sourcing large undesignated donations, preference for non-grants but general donations from affinity corporations and individuals.

### Reports

In either February or March, we anticipate adding the Statement of Cash Flows to this packet after final reconciliation is completed.

We anticipate the Statement of Financial Position to be reconciled and accurate at the next board meeting.

The delays are due to the software conversion, reconciliation of prior software and financials, and the amount of daily work.

### Auditing

We are currently being audited by OHCS CPA's for the ESG grant awarded in 2021-2022.

We have also received monitoring letters from PHB and Multnomah, which are being presented now for both Fiscal and Program, as part of their mid-year grant review.

We will keep you informed of any findings.

### Training

We had discussed at the November board meeting about financial trainings being made available.

It is important that we train management and staff, and the board, to our financials.

Now that the implementation is complete, we will focus on these training presentations in the month of February.

We will send a few times of availability for mid-February, prior to the next committee and board meeting.

Tracy Baird, with Kim McCarty



# Statement of Activity by Month

July - December, 2023

	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Total
<b>REVENUE</b>							
4000 Contributions & Gifts	38.00	144.07	60.91	2,821.00	168.21	1,056.00	4,288.19
4110 Foundation Grants		5,000.00					5,000.00
4120 Government Grants	19,027.22	21,172.99	19,337.19	32,396.99	54,378.43	87,917.06	234,229.88
4135 Membership	931.10	2,067.45	3,233.80	968.30	1,789.80	1,478.30	10,468.75
4139 Refunds Given	-343.14	-306.04					-649.18
<b>Total 4135 Membership</b>	<b>587.96</b>	<b>1,761.41</b>	<b>3,233.80</b>	<b>968.30</b>	<b>1,789.80</b>	<b>1,478.30</b>	<b>9,819.57</b>
4140 Contracts	8,981.98	2,108.30	4,653.80	6,260.72	1,479.30	996.27	24,480.37
4150 Other Revenue	204.00	47.50	77.50	57.50	3,049.78	47.50	3,483.78
4160 Interest Income	4.45	4.46	4.17	4.61	6.15	5.97	29.81
4999 Release From Restriction	8,333.33	8,333.33	8,333.33	8,333.33	8,333.33	8,333.35	50,000.00
<b>Total Revenue</b>	<b>37,176.94</b>	<b>38,572.06</b>	<b>35,700.70</b>	<b>50,842.45</b>	<b>69,205.00</b>	<b>99,834.45</b>	<b>331,331.60</b>
<b>GROSS PROFIT</b>	<b>37,176.94</b>	<b>38,572.06</b>	<b>35,700.70</b>	<b>50,842.45</b>	<b>69,205.00</b>	<b>99,834.45</b>	<b>331,331.60</b>
<b>EXPENDITURES</b>							
6000 Salaries, Wages, & PTO	37,809.96	24,340.54	24,773.07	32,790.22	47,572.51	73,649.08	240,935.38
6100 Payroll Tax - Federal	2,892.15	1,861.31	2,099.20	2,508.44	3,629.83	5,951.26	18,942.19
6105 Payroll Tax - State/Local	151.45	97.80	99.31	131.32	177.29	260.69	917.86
6110 Payroll Tax - Unemployment	462.40	204.68	597.64	296.46	555.66	1,034.78	3,151.62
6120 Payroll Tax - Worker's Comp	7.86	0.31	0.36	8.37	618.23	17.14	652.27
6130 Benefits - Health	19,629.98	5,733.92	3,736.20	1,898.51	6,722.31	6,305.77	44,026.69
6140 Benefits - Dental	2,047.78	370.66	370.66	199.06	723.02	892.91	4,604.09
6180 Benefits - Telecom Stipend	160.00	40.31	80.00	320.00	440.00	680.00	1,720.31
6200 Payroll Related Expense	851.12	297.52	293.77	331.19	286.00	375.95	2,435.55
7110 Advertising-Promotional	164.49			2,880.55			3,045.04
7130 Bank Fees			30.00	29.97	30.00		89.97
7135 Merchant Fees	110.24	119.70	160.55	721.19	403.27	351.03	1,865.98
7150 Business Insurance	3,107.36				949.50	10,685.49	14,742.35
7160 Interest Paid		813.22	205.99	614.69	1,193.72	1,270.94	4,098.56

	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Total
7170 Licenses & Registrations	50.00						50.00
7310 Office Lease	3,642.42	3,930.03	3,930.03	3,930.03	3,936.40	4,045.68	23,414.59
7345 Utilities	662.61	447.93	375.00	375.00	375.00	415.26	2,650.80
7400 Legal & Professional	17,565.88	26,137.57	28,823.74	20,029.38	21,255.59	17,123.13	130,935.29
7550 Dues & Subscriptions	50.00				495.00	535.00	1,080.00
7560 Supplies & Materials		37.55	73.80	10.20		109.07	230.62
7570 Technology & Software	5,303.90	4,266.90	2,172.91	3,470.92	5,540.90	4,174.04	24,929.57
7575 Telecommunications	2,139.71	2,077.06	1,973.36	1,977.03	1,903.04	1,881.16	11,951.36
7600 Program Direct Services		3,130.00	80.00	13,341.20	90.00	123.80	16,765.00
7720 Travel & Mileage					569.25	1,966.94	2,536.19
<b>Total Expenditures</b>	<b>96,809.31</b>	<b>73,907.01</b>	<b>69,875.59</b>	<b>85,863.73</b>	<b>97,466.52</b>	<b>131,849.12</b>	<b>555,771.28</b>
<b>NET OPERATING REVENUE</b>	<b>-59,632.37</b>	<b>-35,334.95</b>	<b>-34,174.89</b>	<b>-35,021.28</b>	<b>-28,261.52</b>	<b>-32,014.67</b>	<b>-224,439.68</b>
<b>NET REVENUE</b>	<b>\$ -59,632.37</b>	<b>\$ -35,334.95</b>	<b>\$ -34,174.89</b>	<b>\$ -35,021.28</b>	<b>\$ -28,261.52</b>	<b>\$ -32,014.67</b>	<b>\$ -224,439.68</b>

# Statement of Financial Position Summary - Preliminary Unreconciled

As of December 31, 2023

	<b>Total</b>
<b>ASSETS</b>	
<b>Current Assets</b>	
Bank Accounts	527,994.30
Accounts Receivable	197,115.40
Other Current Assets	1,602,192.77
<b>Total Current Assets</b>	<b>2,327,302.47</b>
<b>TOTAL ASSETS</b>	<b>\$2,327,302.47</b>
<b>LIABILITIES AND EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
Accounts Payable	100,367.21
Credit Cards	2,650.67
Other Current Liabilities	145,000.00
<b>Total Current Liabilities</b>	<b>248,017.88</b>
<b>Total Liabilities</b>	<b>248,017.88</b>
Equity	2,079,284.59
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$2,327,302.47</b>

# A/R Aging Summary

As of January 1, 2024

	Current	1 - 30	31 - 60	61 - 90	91 and over	Total
Home Forward						0.00
Home Forward 2023	3,881.57	4,107.00				7,988.57
<b>Total Home Forward</b>	<b>3,881.57</b>	<b>4,107.00</b>				<b>7,988.57</b>
Metro						0.00
Metro 2023	47.73	272.30				320.03
<b>Total Metro</b>	<b>47.73</b>	<b>272.30</b>				<b>320.03</b>
Multnomah County						0.00
Mult Cty 2023 (GAP)	16,967.05	30,814.67				47,781.72
Mult Cty CDBG 2024	2,463.42	1,421.09				3,884.51
<b>Total Multnomah County</b>	<b>19,430.47</b>	<b>32,235.76</b>				<b>51,666.23</b>
OHCS						0.00
OHCS 2024	53,780.69	28,360.55				82,141.24
<b>Total OHCS</b>	<b>53,780.69</b>	<b>28,360.55</b>				<b>82,141.24</b>
PHB						0.00
PHB 2024	35,876.99	19,122.34				54,999.33
<b>Total PHB</b>	<b>35,876.99</b>	<b>19,122.34</b>				<b>54,999.33</b>
<b>TOTAL</b>	<b>\$113,017.45</b>	<b>\$84,097.95</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$197,115.40</b>

# A/P Aging Summary

As of January 1, 2024

	Current	1 - 30	31 - 60	61 - 90	91 and over	Total
Abila	1,187.95	80.00				1,267.95
Adobe			19.99			19.99
Beneficial Bank			-1,193.72			-1,193.72
BenefitHelp Soulutions	123.00		85.00			208.00
Carolina Miori	280.00					280.00
CFS	3,248.44	6,015.63	6,954.06	10,924.38	5,864.55	33,007.06
CHUBB		1,899.00				1,899.00
ClickTime		40.00				40.00
COPYTRONIX	45.07					45.07
Everyaction					2,245.00	2,245.00
Feathr			5,125.00			5,125.00
Golden Solutions					6,000.00	6,000.00
GoTo Communications, inc	700.63					700.63
J.D. Fulwiler		2,727.00				2,727.00
Matthew Edmonds		6,400.00				6,400.00
Minuteman Press Powell		-800.00				-800.00
Moda Health	16,737.81	4,579.63			3,172.03	24,489.47
NIA	3,040.98					3,040.98
Ogletree Deakins					7,490.00	7,490.00
PCUN	500.00					500.00
Portland Defender PC	22,500.00					22,500.00
Praxis Political LLC.					4,002.00	4,002.00
Robert Half					1,424.80	1,424.80
T Mobile	965.00	972.65	170.47			2,108.12
United Airlines		-124.41				-124.41

	<b>Current</b>	<b>1 - 30</b>	<b>31 - 60</b>	<b>61 - 90</b>	<b>91 and over</b>	<b>Total</b>
Upward Technology	1,860.60	3,261.20	2,376.00		8,015.27	15,513.07
Washington State Dept. of Labor & Industries		601.99				601.99
Waste Managment	72.96					72.96
Workplace Change					3,675.00	3,675.00
YoyoDyne LLC	4,420.68					4,420.68
<b>TOTAL</b>	<b>\$55,683.12</b>	<b>\$25,652.69</b>	<b>\$13,536.80</b>	<b>\$10,924.38</b>	<b>\$41,888.65</b>	<b>\$147,685.64</b>