



City Council

June 16th, 2025

6pm

Newberg Public Safety Building 401 E. Third Street

Denise Bacon Community Room

Online: <https://us06web.zoom.us/j/89536547180>

Public Comment Registration

[View Slides](#)

-
- 1. Call to Order**
 - 2. Roll Call**
 - 3. Pledge of Allegiance**
 - 4. City Manager Report**
 - 4.1. March Statistical Report**
 - 5. Public Comments**
 - 5.1. Written Comment- Lee**
 - 6. Presentations**
 - 6.1. Asago Middle School Exchange Report**
 - 7. Consent**
 - 7.1. Approval of Landscaping Maintenance Services Contract**
 - 8. Continued Business**
 - 8.1. Street Tree List and Replacement Policy Review**
 - a. Attachment 1: Proposed Street Tree List**
 - b. Presentation**
 - c. Registration Written Comment: Soppe***
 - 8.1.c.1. Comment***
 - 9. New Business**
 - 9.1. CET Grants- Notice of Funding Availability Round 2 Awards**
 - a. Exhibit A: Newberg Area Habitat for Humanity Project Application**
 - b. Exhibit B: SPARK Project Application**
 - c. Staff Presentation**
 - d. Habitat for Humanities Presentation**
 - e. Habitat for Humanities Letters of Support**
 - f. SPARK Presentation**

9.2. [Supplemental Budget #3](#)

- a. [Presentation](#)

9.3. [Rate Review Appointments](#)

- a. [Attachment A: Peregrino de Brito Application](#)
- b. [Attachment B: Kuhlman Application](#)

9.4. [Media Recognition Review- Newsberg](#)

- a. [Attachment A: Application](#)

10. Adjournment

ADA Statement: Contact the City Recorder's Office for physical or language accommodation at least 2 business days before the meeting. Call (503) 537-1283 or email cityrecorder@newbergoregon.gov. For TTY services please dial 711.

*Indicates supplementary item

REQUEST FOR COUNCIL ACTION



Date Action Requested: (June 16, 2025)

Order <input type="checkbox"/>	Ordinance <input type="checkbox"/>	Resolution <input type="checkbox"/>	Motion <input type="checkbox"/>	Information <input checked="" type="checkbox"/>	Proclamation <input type="checkbox"/>
Subject: CM statistics for June 16 2025				Staff: Will Worthey CM Department: Administration	
Work Session <input type="checkbox"/> Business Session <input checked="" type="checkbox"/>				Order On Agenda: CM report	

Is this item state mandated? Yes ☐ No ☒

If yes, please cite the state house bill or order that necessitated this action: NA

Recommendation: NA

Executive Summary: The statistical summary of events conducted by city departments to the end of April 2025.

Fiscal Impact: All were conventionally budgeted items.

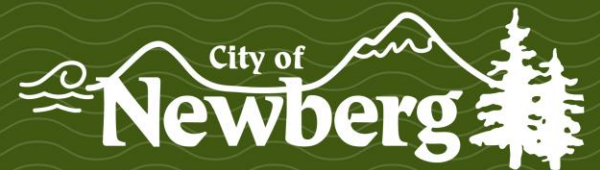
Council Goals:

Goal 4: Create and maintain a high level of transparency with our residents in order to build trust.

O1: Expand communication outreach in regard to regular city events and additional involvement with city businesses by the end of 2026.

Newberg CM report

Monthly Statistics to the end of April 2025



Planning: combined planning decisions of all sorts*: 2

**Average
2022**

11.67

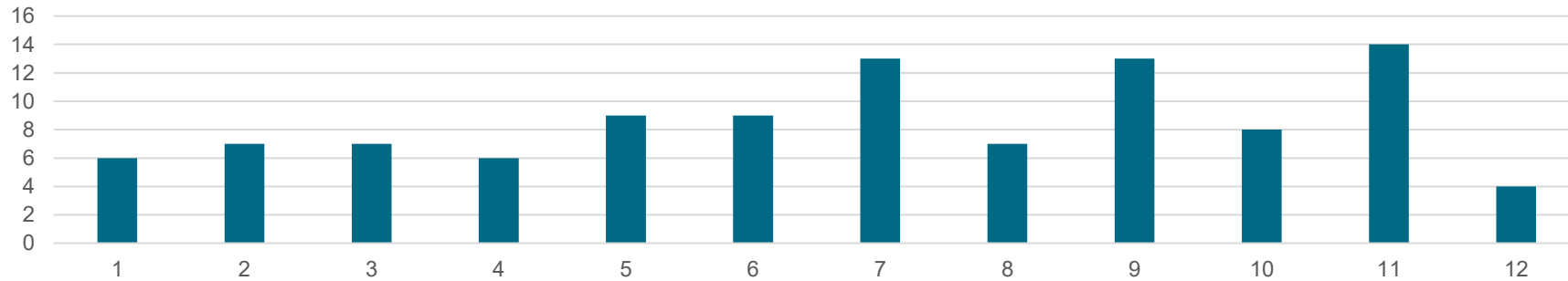
Planning Decisions



**Average
2023**

11.75

2024 - Planning Decisions – 8.58



* Combined from the Director, Planning Commission and Council

Planning: building permits for housing units: 2

**Average
2022**

15

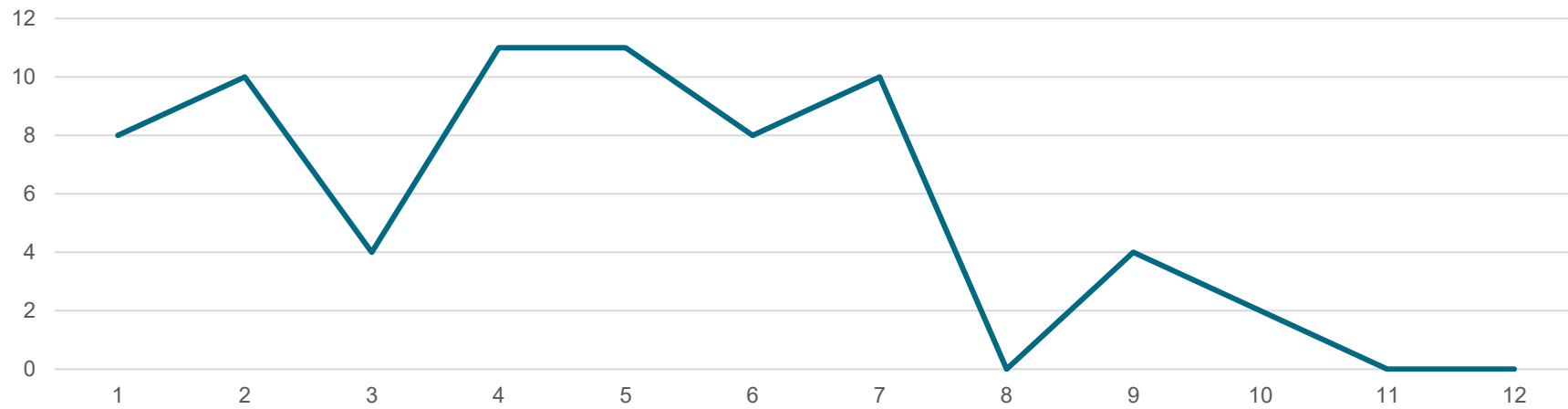
Permits for units



**Average
2023**

7.75

2024 - Permits for units – 5.67



Planning: building permits other types: 36

**Average
2022**

122

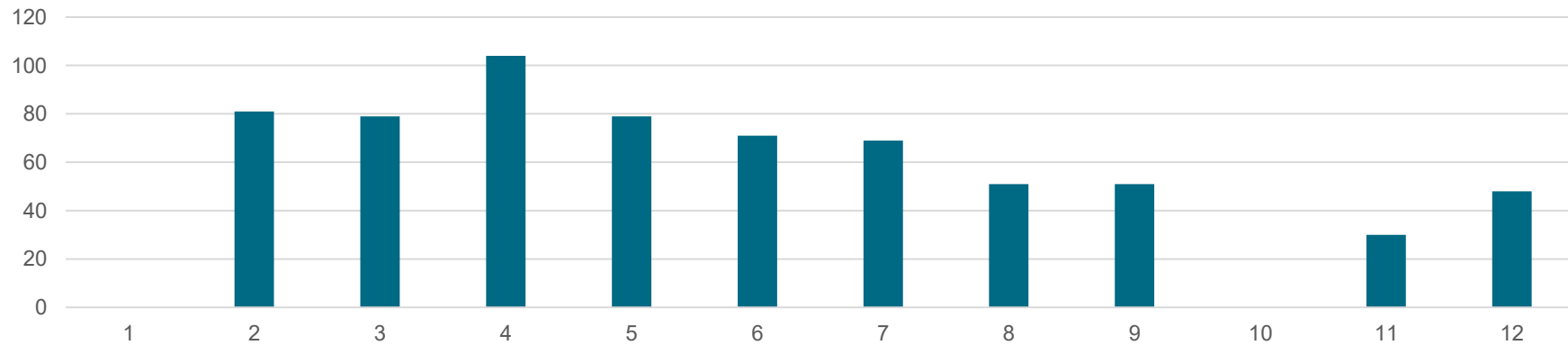
Other Building Permits



**Average
2023**

101

2024 - Other Building Permits – 55.25



Planning: building inspections: 444

Building Inspections



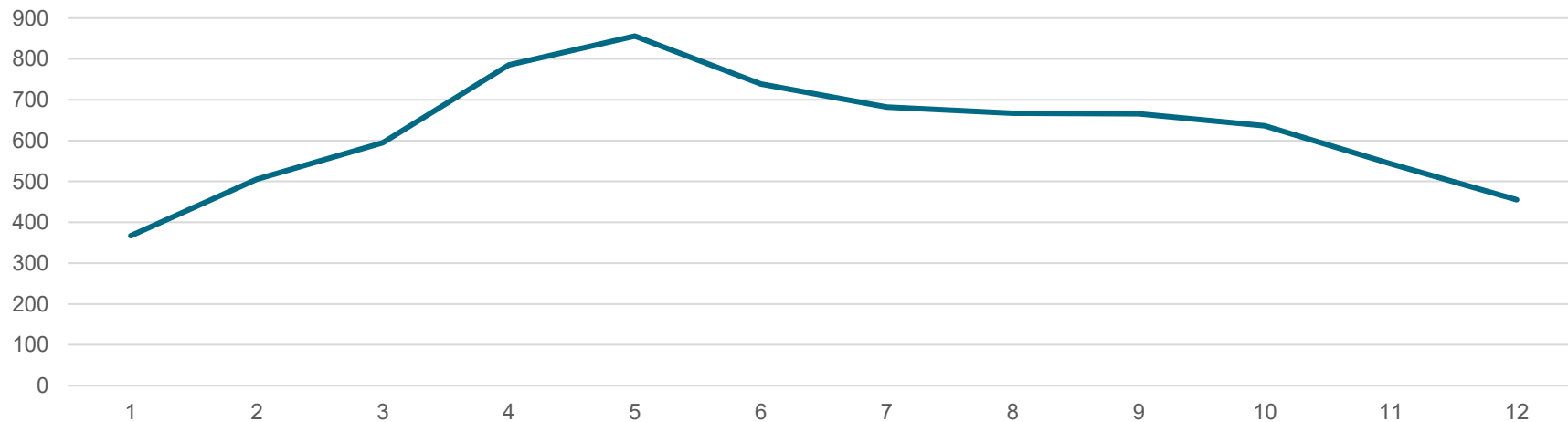
**Average
2022**

691

**Average
2023**

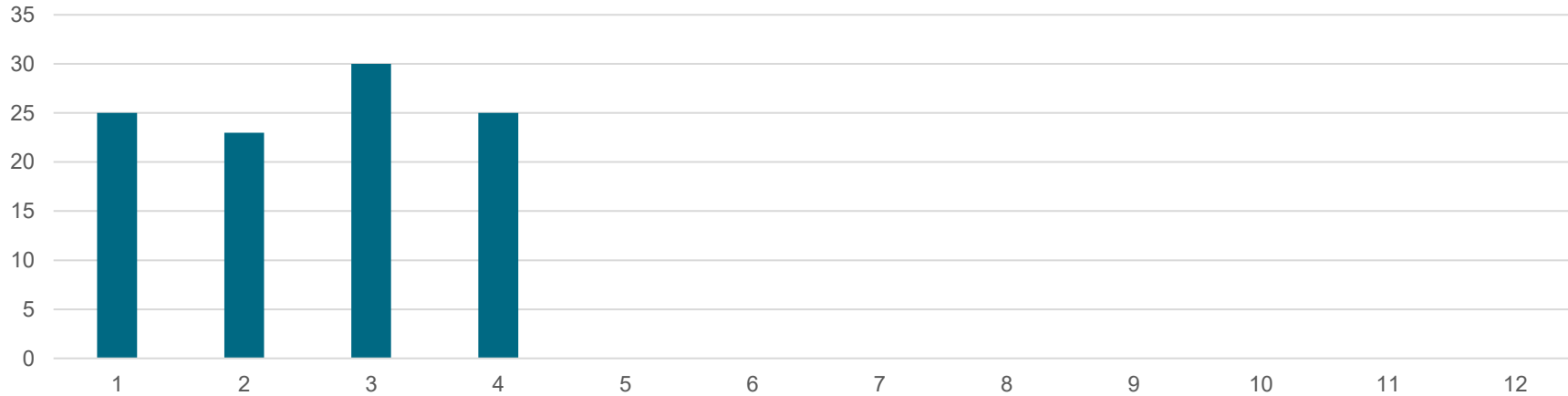
728

2024 - Building Inspections – 624.67



Community Engagement: submission forms through website: 25

Web site postings we responded to



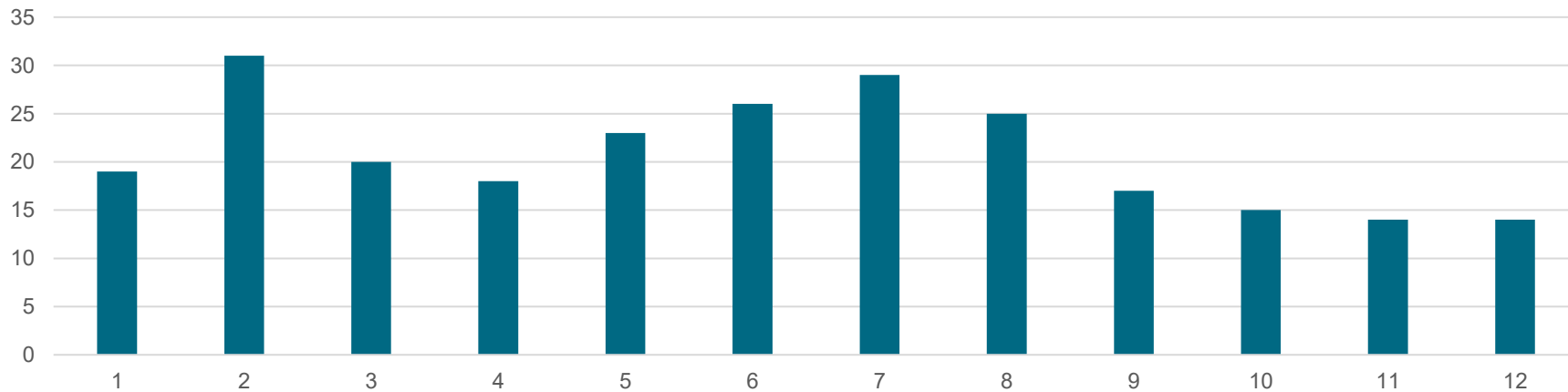
**Average
2022**

23

**Average
2023**

24.58

2024 - Web site postings we responded to – 20.92



Community Engagement: social media engagement: 17,996

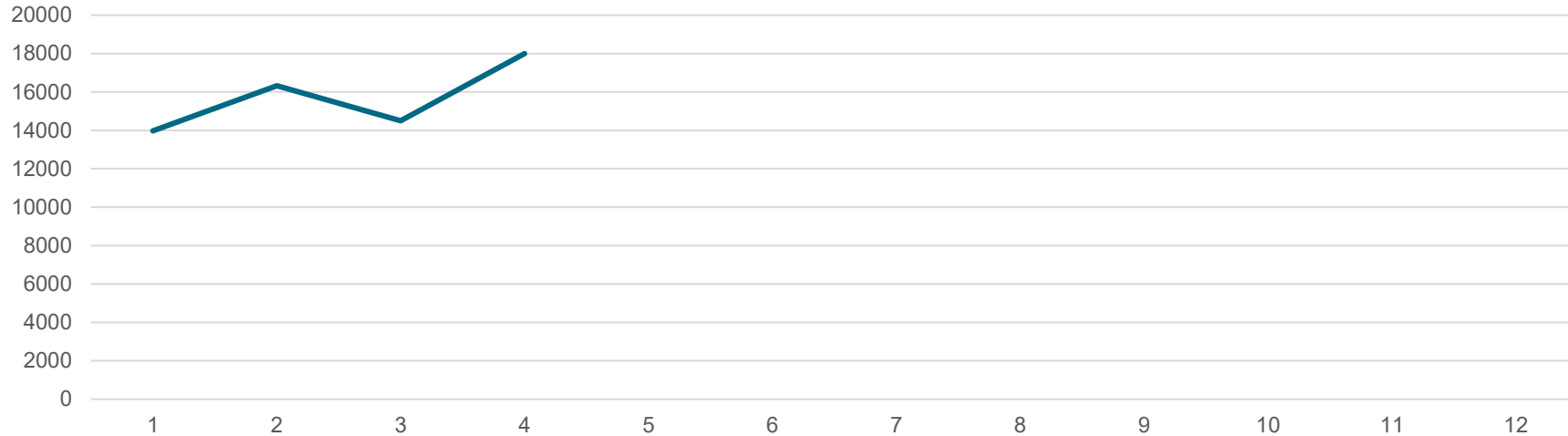
**Average
2022**

7942.5

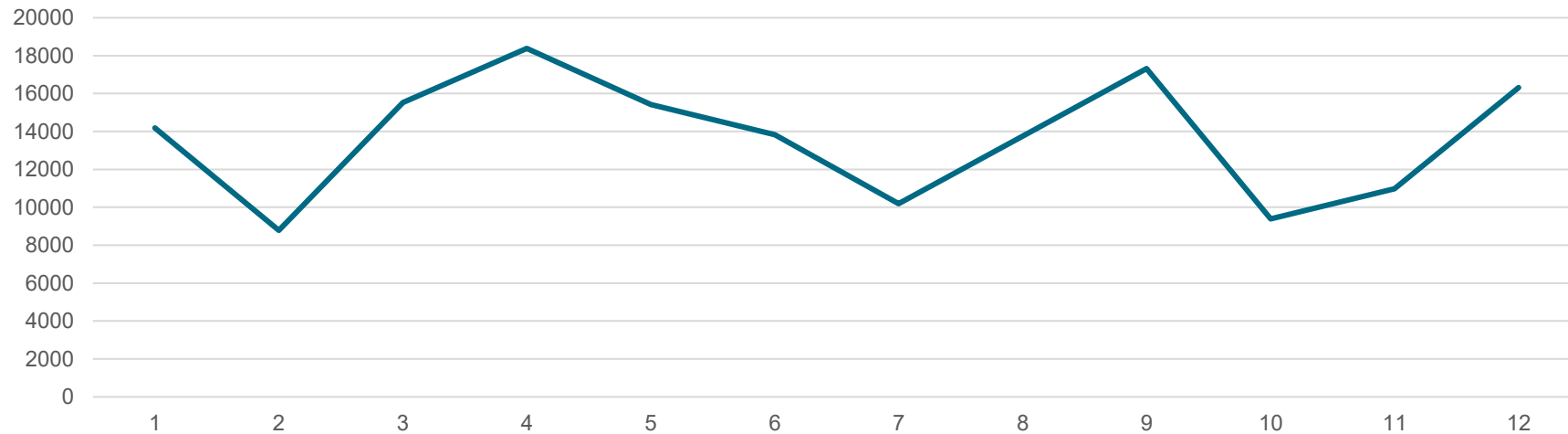
**Average
2023**

7560.8

Social Media Engagement



2024 - Social Media Engagement – 13672.92



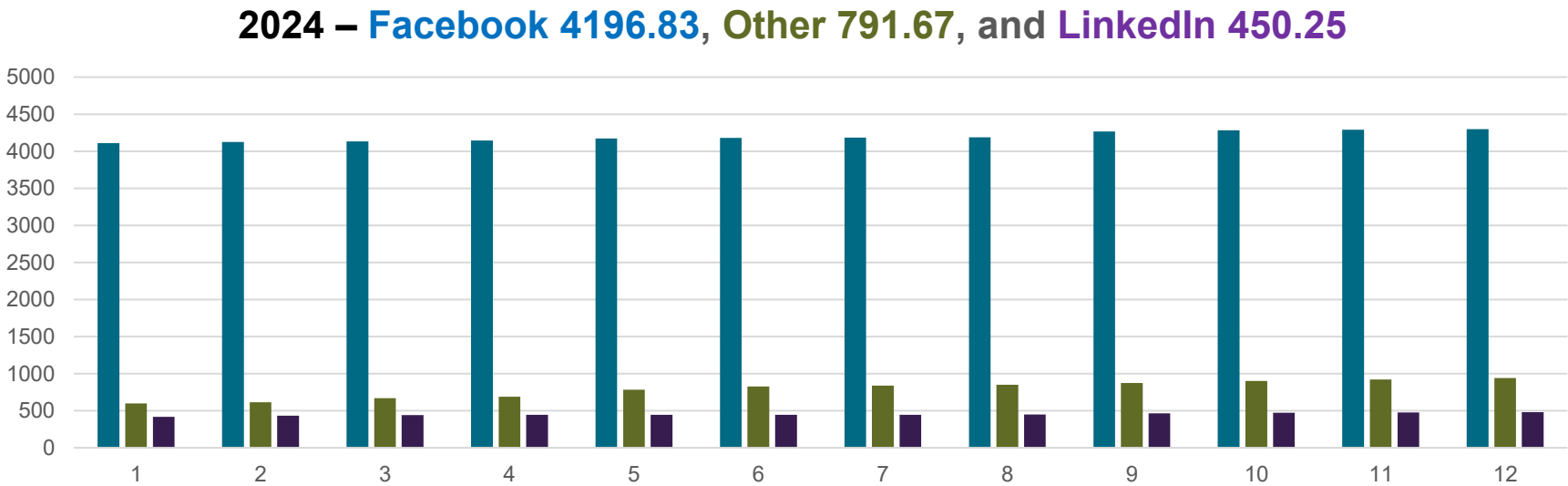
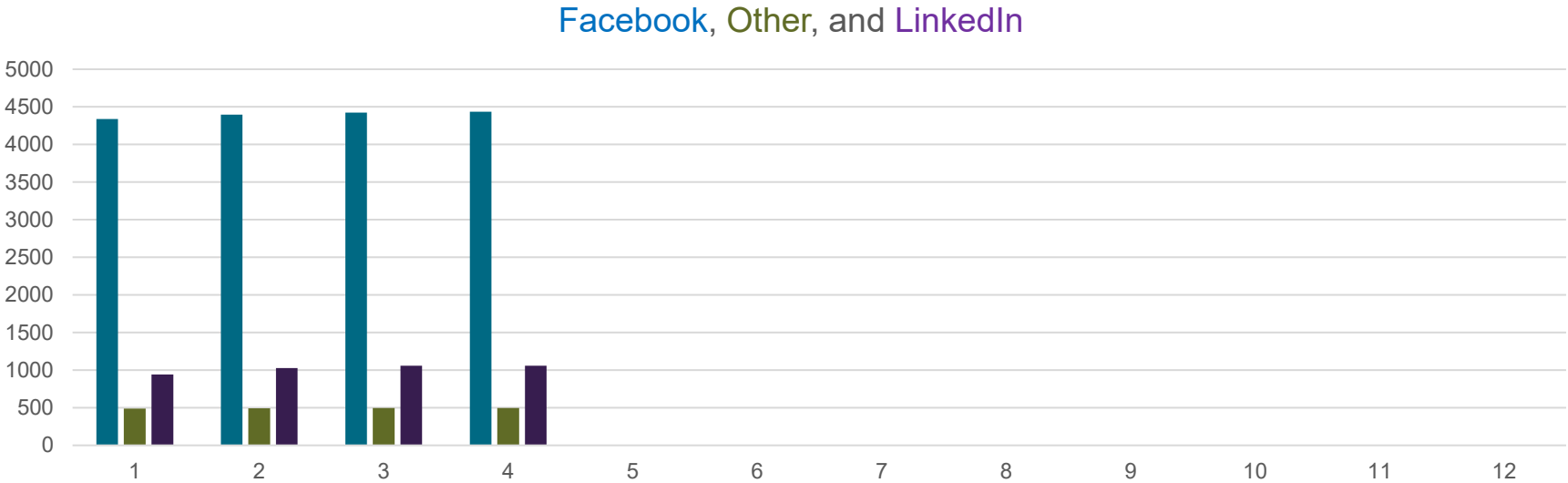
Community Engagement: Socials followers Facebook 17,996, Other 498, LinkedIn 1058

Average
2022

Facebook
3746
Twitter
415
LinkedIn
253.6

Average
2023

Facebook
3937
Other
437
LinkedIn
326

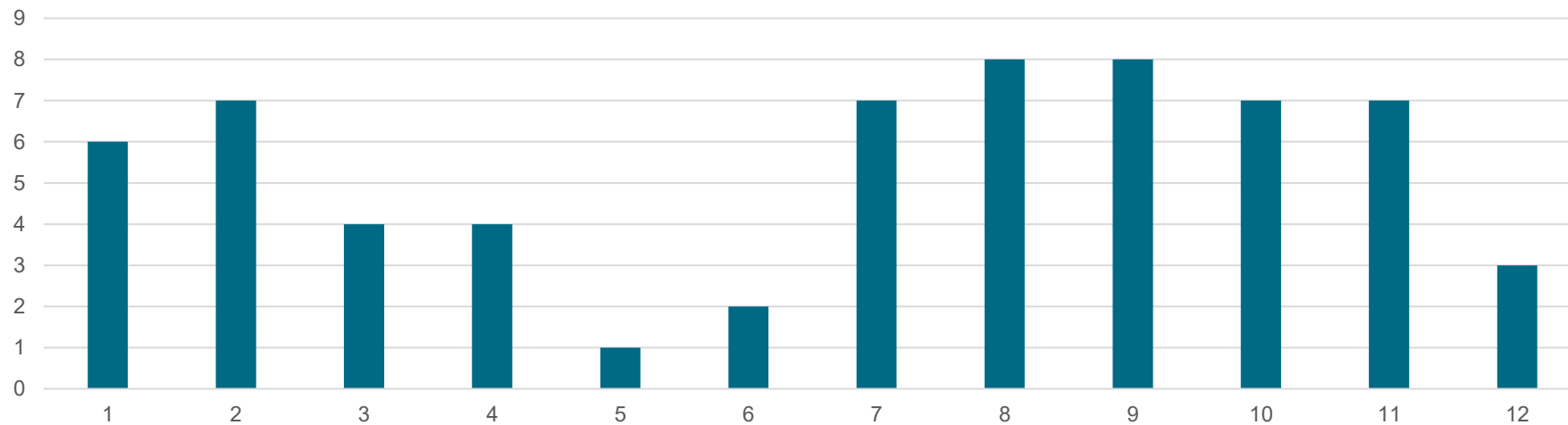


City Recorder: Public Records Requests: 7

Public Information Requests



2024 - Public Information Requests – 5.33



**Average
2022**

4.5

**Average
2023**

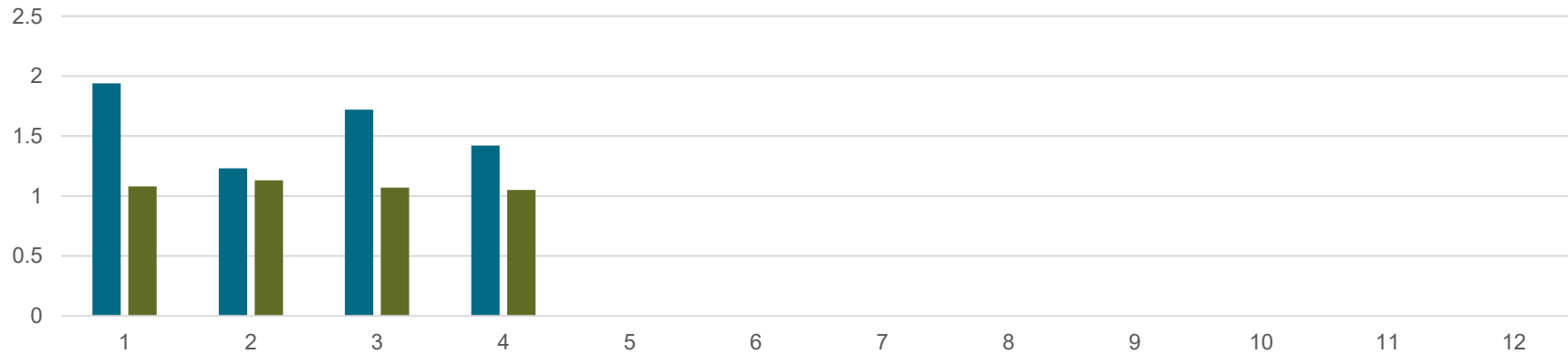
5.5

Finance: \$1.42 M of payments to accounts payable & \$1.05 M of payroll

Average 2022

AP
\$1.75 M
Payroll
\$0.93 M

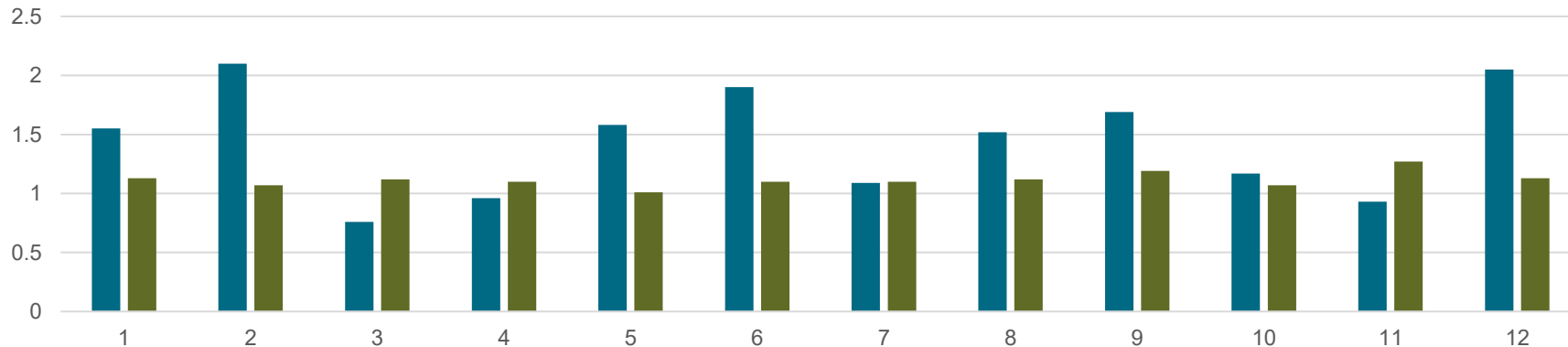
Accounts Payable \$ and Payroll \$



Average 2023

AP
\$2.56 M
Payroll
\$1.01 M

2024 - Accounts Payable \$1.44 and Payroll \$1.12

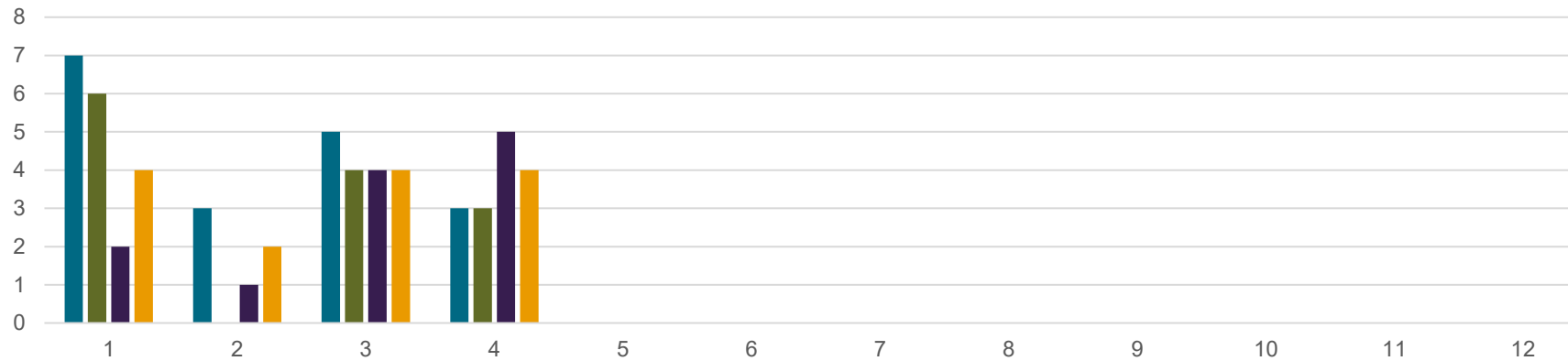


**Average
2022**

Recruitments
5.6
Hires
1.9
Separations
1.6
Claims
2.6

**HR: Recruitments advertised - 3 Hires: 3 Separations: 5,
FMLA / ADA / OFLA / workers comp claims: 4**

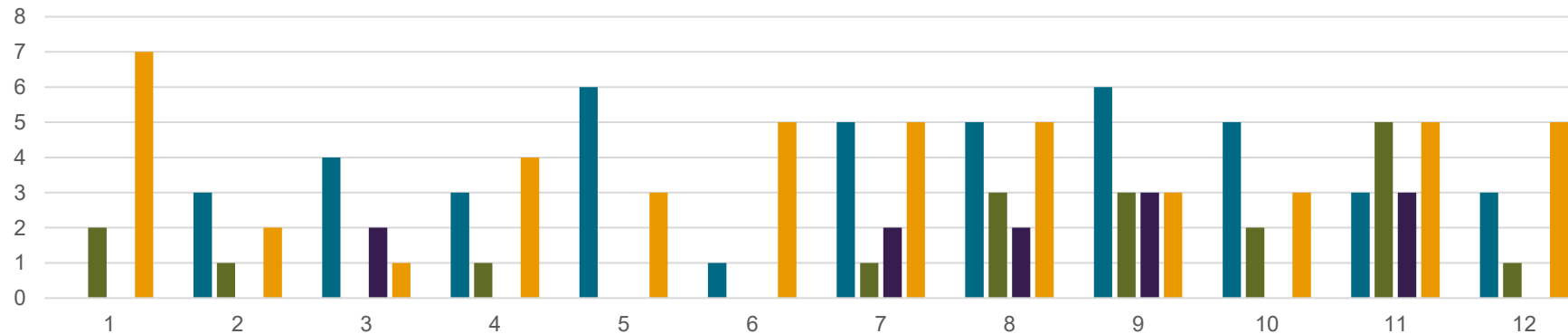
Recruitments, Hires, Separations, Claims



**Average
2023**

Recruitments
4.17
Hires
1.92
Separations
1.08
Claims
3.33

2024 – Recruitments 3.67, Hires 1.58, Separations 1.00, Claims 4.00



IT resolved 406 service tickets for the city.

**Average
2022**

203.4

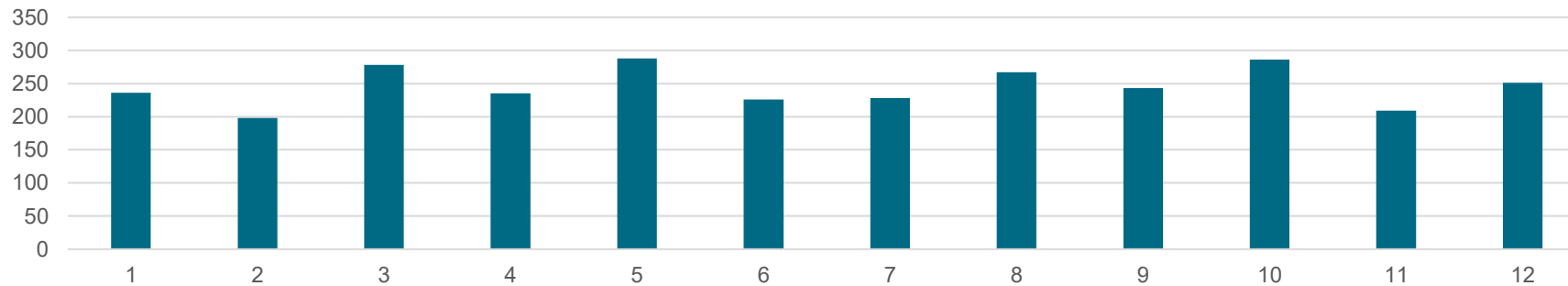
Service Tickets



**Average
2023**

232.3

2024 - Service Tickets – 245.42



IT responded to 6 after hours on-call events.

**Average
2022**

3.6

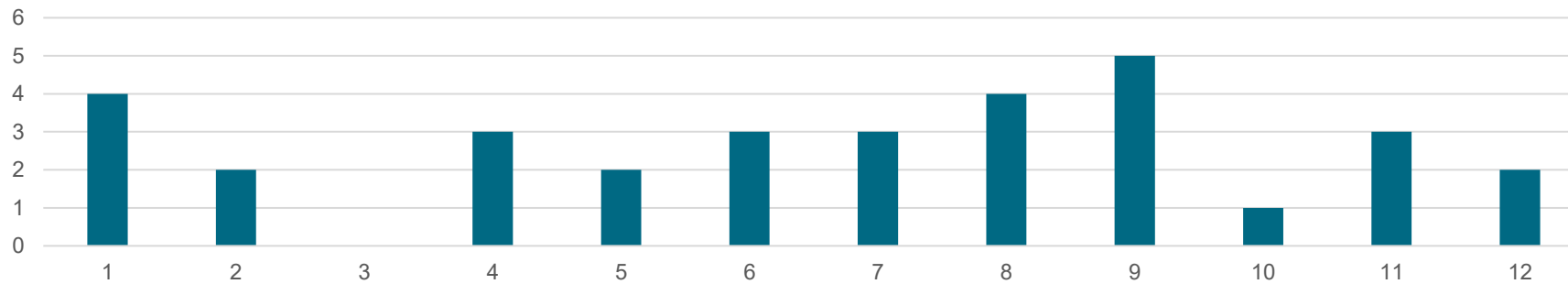
After hours events



**Average
2023**

2.58

2024 - After hours events – 2.67



Library Activity: Door count 6,103, Circulation events 32,332

**Average
2022**

**Door Count
7108
Circulation
Events
23,418**

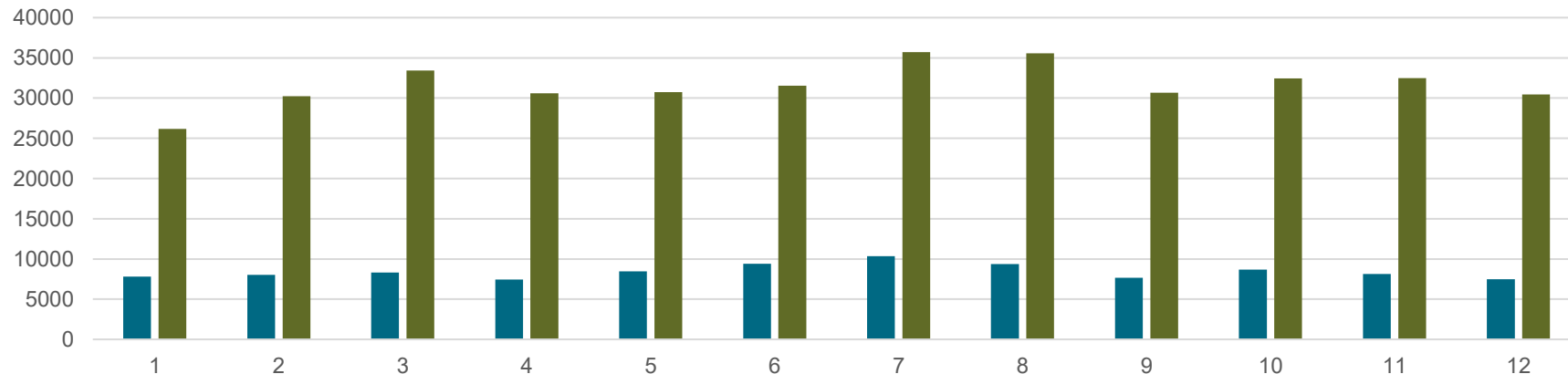
Door Count, Circulation Events



**Average
2023**

**Door Count
8372
Circulation
Events
25,889**

2024 - Door Count 8426.17, Circulation Events 31668.58



Public Safety:

Due to a failure in the RMS software platform, we did not have the April statistics compiled in time for this report.

Normal statistics collation will resume soon.

Dispatch: 729 “911” calls & 2683 non-emergency calls

**Average
2022**

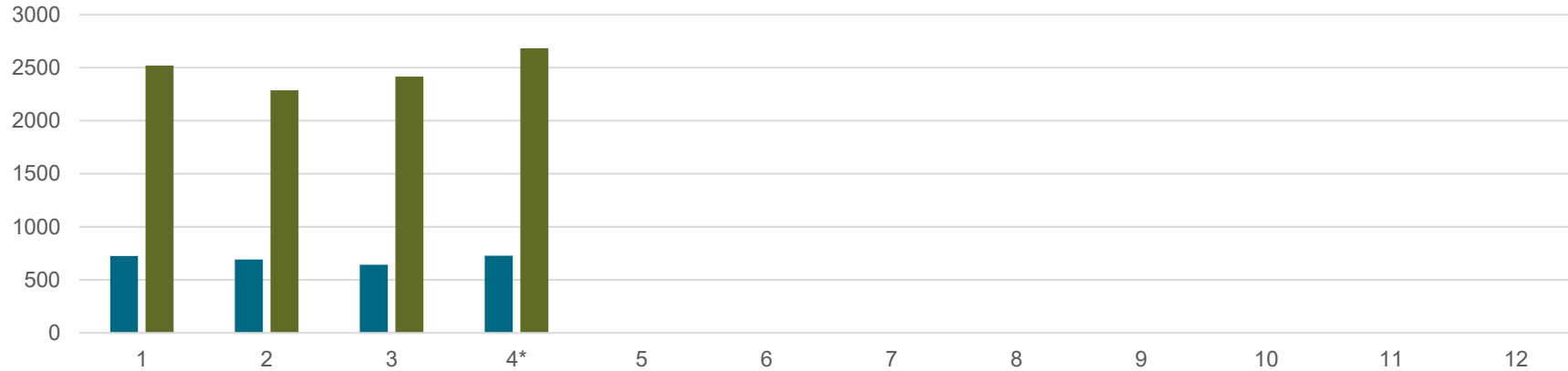
911 Calls

817

**Non-
Emergency
Calls**

3436

911 calls, Non emergency calls



**Average
2023**

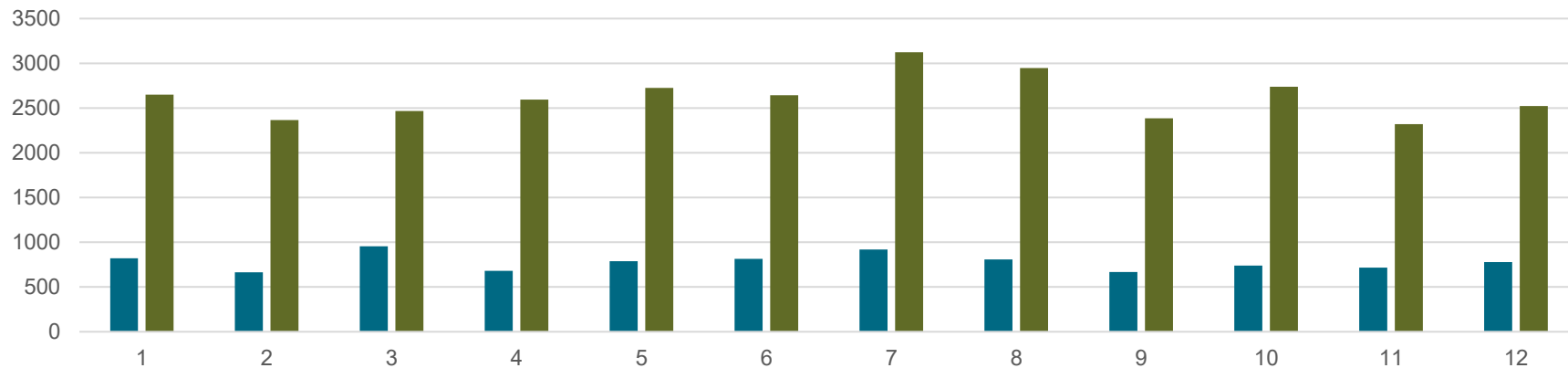
911 Calls

892

**Non-
Emergency
Calls**

3214

2024 - 911 calls - 779.67, Non emergency calls – 2623.67



Public Works: water production was 49.8 million gallons,
& 100.5 million gallons (MG) were treated

**Average
2022**

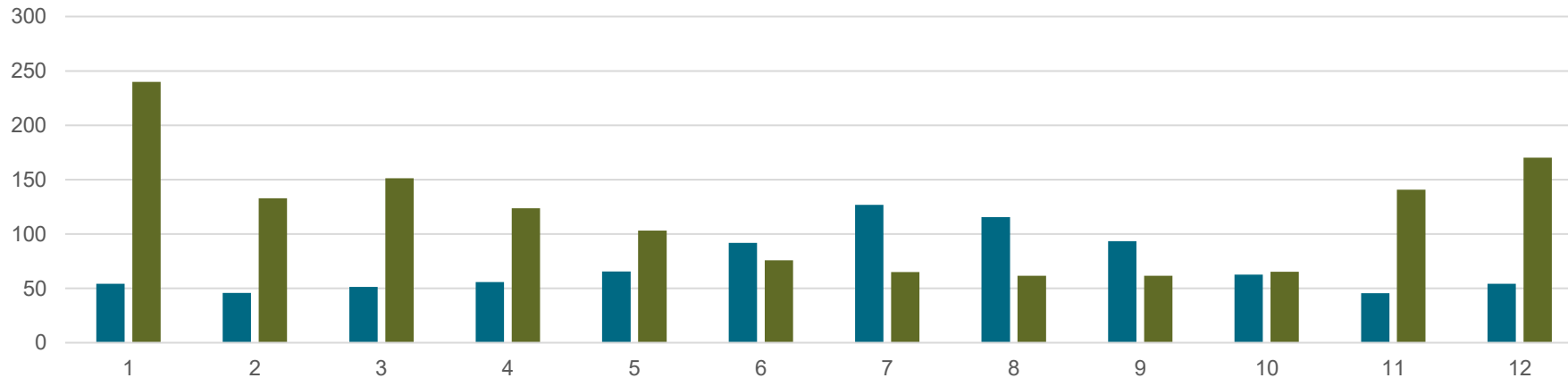
**Clean Water
69.45 MG
Waste Water
105.46 MG**



**Average
2023**

**Clean Water
73.33 MG
Waste Water
108.20 MG**

2024 - Clean water – 71.89, Waste Water – 115.92

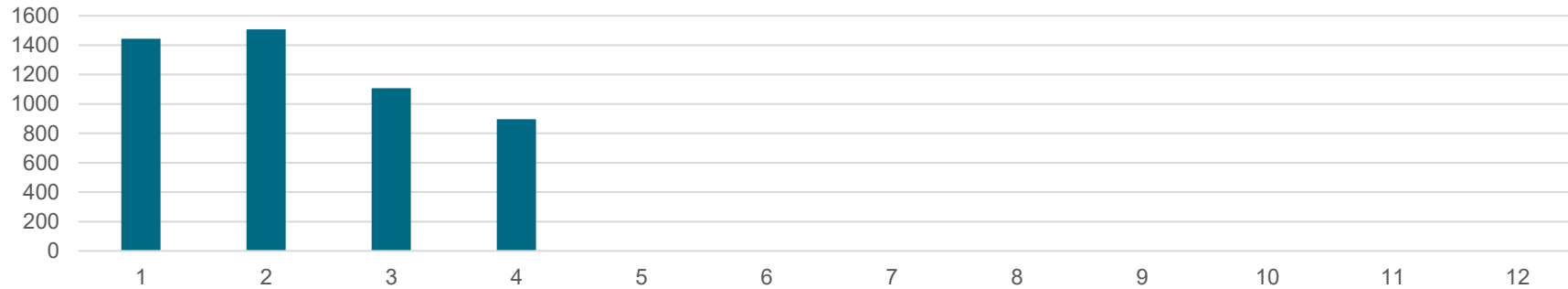


Public Works: 897 work orders completed

**Average
2022**

1452.6

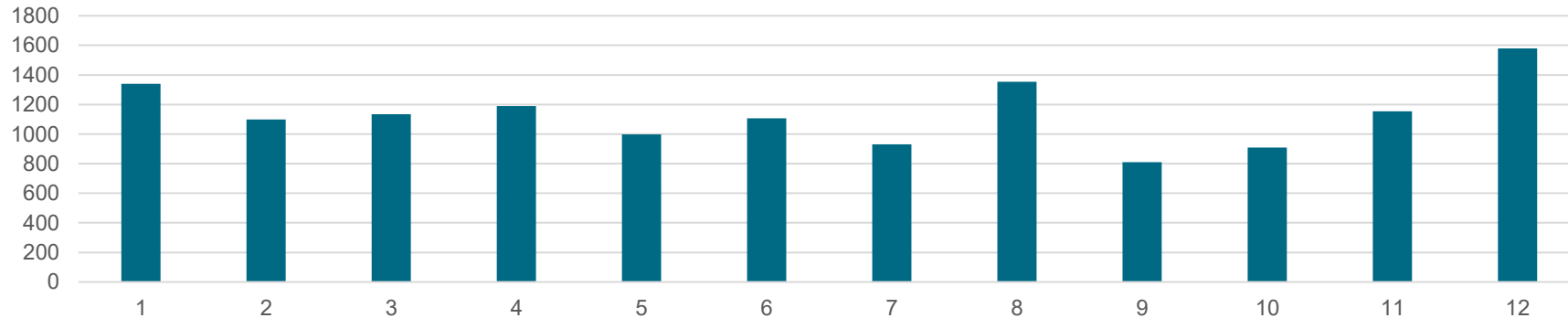
Work orders completed



**Average
2023**

1677

2024 - Work orders completed – 1133.42



So that's the totals to the end of
April 2025.

Questions?

From: noreply@revize.com
To: [City Recorder](#)
Subject: New Public Comment
Date: Saturday, May 31, 2025 12:45:30 PM

This email originated from outside the City of Newberg's organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Date = 2025-06-02
Meeting-Body = None
Agenda-Item =
Subject-Matter-to-Comment-On =
Name = Maryann Lee
Representing =
Email-Address = [REDACTED]
Phone Number = [REDACTED]
Contact-Info-release[] = Yes
Is-this-a-public-hearing[] = Yes
Written-or-Spoken[] = Written
Written-Comment = Hi City of Newberg,

I was curious if there has been any talk about what to do with the old railway that is between Ewing Young and the Old Mill property in Newberg? It potentially could connect Ewing Young and Rogers Landing. I havent seen a train on it for about 10 years. In addition, it is starting to become overgrown. The sticker bushes are pushing on the fence of the group home I work at. I work at James Street which backs up to the old railroad tie. I think it could be a great rails to trails. I guess a railroad company owns it but it looks abandoned/decommisioned to me. Either way it is becoming overgrown and affecting adjacent properties. Thanks, all.

Regards,
Maryann Lee
Client IP = 76.115.196.213

Asago City 2025





Newberg Delegates Joining in
on P.E. class

Newberg
Delegates joining
a class and
learning how to
play a traditional
Japanese game



Newberg
Delegates
hanging out
with Japanese
Students at
recess.





Photo taken after
the Japanese
students showed
us how to do
Calligraphy

Nature



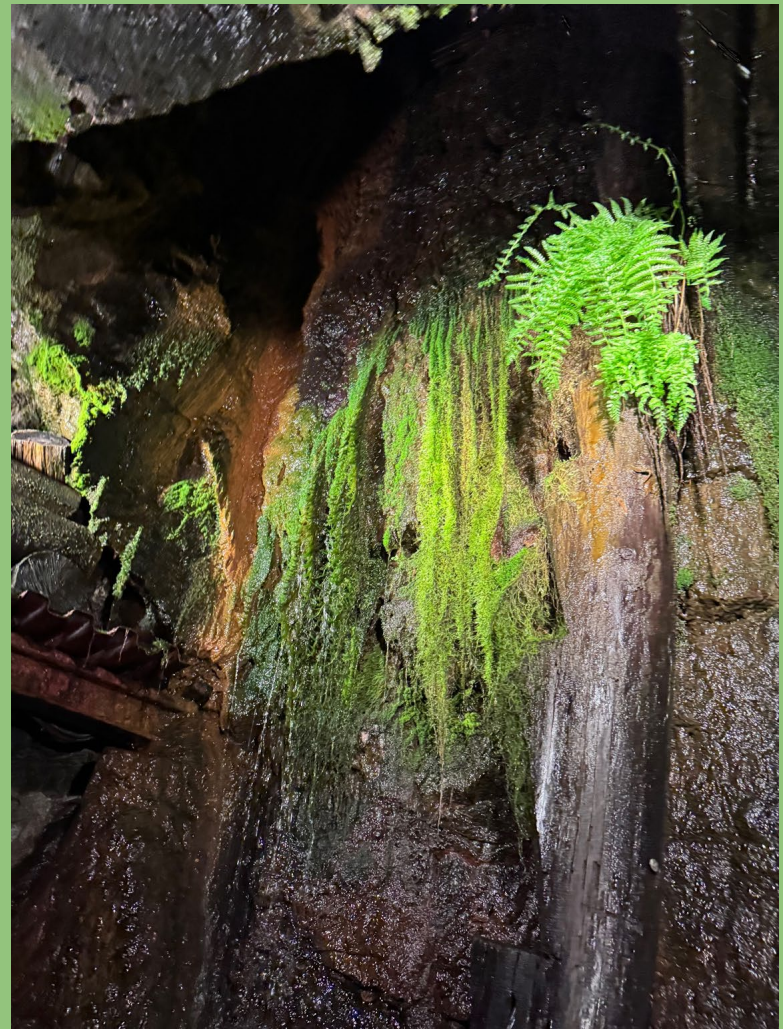
Mountains around
Asago City

About 70% of land in Japan is covered in forest.
Forest land has actually increased over the last
200 years.



Ikuno Silver Mine:

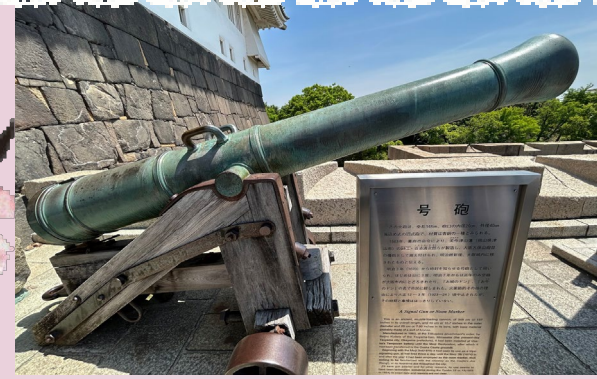
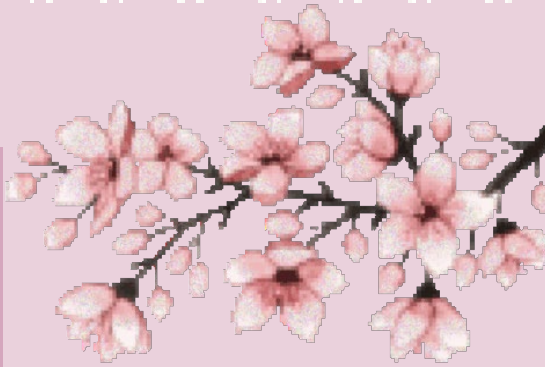
Nature thrives in this
historical mining area.



Architecture

Osaka Castle

- Constructed from 1585- 1585
- It currently houses over 10,000 historical artifacts
- Surrounded by Nishinomaru Garden and park with 600 cherry trees
- The castle is similar to military architecture



Cannon located outside the castle



View of Osaka Castle through the trees



Golden Dragon and Tiger located inside the castle



Architecture

Takeda Castle Ruins

- Takeda Castle is known as “The Castle in the Sky”
- A “Sea of Clouds” appears around the castle in October and November
- 353 meters above sea level



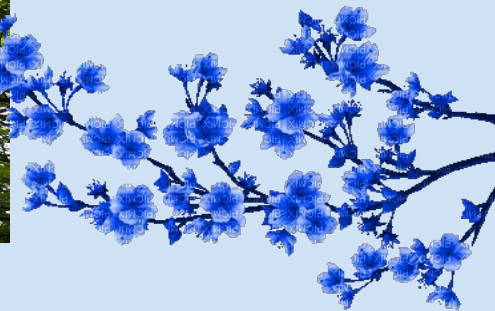
Takeda Castle Ruins wall



View across the ruins



Magnolia Pyramidata tree



Architecture



Iwami Ginzan Silver Mine Town

- The mines were in operation from 1527 to 1923
- The town is surrounded by mountains
- It houses distinct features such as red-tiled buildings
- Samurai houses as well as former mine workers homes are still standing



A room lined with Tatami mats



Outside view of mine worker's housing



Courtyard view from merchant's home



Food

Sushi



Food

Curry rice



Food

Ramen



Food

Okonomiyaki

“Grilled as you like it”





Mascots!

Top Right: Asago City Symbol

Bottom Right: Himeji Castle Mascot

Middle: Chasurin

Left: Takeji





2025 Delegates participating in a traditional Japanese Tea Ceremony

Delegates and their host families trying on kimonos





Buddhist Statue (Above)
Iwakura Rock (Left)

Wrap-up

REQUEST FOR COUNCIL ACTION



Date Action Requested: (June 16, 2025)

Order ☐ Ordinance ☐ Resolution ☒ Motion ☐ Information ☐ Proclamation ☐

No. 2025-3978

Subject: Resolution Authorizing the City Manager to sign a Contract with the DeSantis Landscapes to provide the City with Landscape Services.

Staff: Preston Langeliers, Public Works Maintenance Superintendent

Department: Public Works

Business Session

Order On Agenda: Consent

Hearing Type: Administrative

Is this item state mandated? Yes ☐ No ☒

If yes, please cite the state house bill or order that necessitated this action:

Recommendation:

Adopt Resolutions 2025-3978: A resolution authorizing the City Manager to sign the contract with DeSantis Landscapes to provide the City with landscape services \$141,228 for the initial year.

Executive Summary:

As the City continues to grow, its infrastructure ages, and service demands increase, the maintenance staff has been stretched thin. The Public Works Maintenance Division is consistently tasked with doing more with less and carefully evaluates each decision to ensure it is financially responsible.

After reviewing the costs of hiring a full internal staff to perform the landscaping work, Maintenance determined that doing so would be nearly twice as expensive as outsourcing. While City staff will continue to perform some landscaping tasks, this contract aims to outsource areas that require a significant amount of labor hours to maintain. This will allow City crews to focus on areas where larger equipment can be used, thereby reducing manual labor and maximizing productivity.

The proposed contract supports this strategy and includes the flexibility to add additional landscaping areas as the budget permits, further reducing labor-intensive work for City staff. The initial cost of the contract is \$141,228 for the first year, with an optional annual escalation of 3.5% if requested by the contractor.

Fiscal Impact:

If the Contract is Approved:

1. Service Scope & Cost:

- Contracted landscape maintenance services will commence at \$141,228 for the initial year.
- An annual escalation rate of 3.5% may be applied at the contractor's request.

2. Term:

- The contract duration is five (5) years, with an option for a two (2) year renewal.

3. Flexibility:

- The City retains the right to add or remove service areas throughout the term of the contract in response to budget constraints or operational needs.

4. Budget Impact:

- Funding has been allocated in the approved FY 2025-2027 bi-annual budget to cover the cost of the contract.

If the Contract is Not Approved:

1. Staffing Impact:

- To maintain current service levels without the contract, the City would need to hire four (4) full-time employees (FTEs).
- The estimated cost of these hires is \$547,020 annually, including wages, benefits, and long-term obligations such as cost-of-living adjustments and step increases.
- Based on current fiscal conditions, increasing staff is not a feasible option in the near term.

2. Service Reduction Consequences:

- A reduction in landscape services would result in the following risks and challenges:
 - Increased public complaints
 - Reduced vehicle and pedestrian safety, including compromised sight lines
 - Elevated fire risk due to overgrown vegetation and lack of maintenance
 - Higher legal and insurance expenses, stemming from:
 - More claims against the City (e.g., traffic-related incidents)
 - Increased attorney costs
 - Potential rises in insurance premiums

Council Goals:

Goal 1 – Exceptional Customer Service:

Public Works Maintenance is dedicated to delivering the highest level of service to Newberg residents. For our team, exceptional customer service is not just a City Council goal, it is a core value and daily practice. Our staff takes pride in providing responsive, courteous, and dependable service that reflects our commitment to the community.

Goals 6 & 7 – City Beautification and Enhanced Appearance:

As Newberg continues to grow, the Public Works Maintenance team has had to reassess work strategies to address a growing backlog of deferred maintenance tasks. Among these, landscaping was identified as both cost-effective and ideal for outsourcing. Contracting this service will allow for more efficient and consistent landscape management, which in turn enhances the city's visual appeal, improves safety by reducing fire hazards, and contributes to a cleaner, more attractive community.

Conclusion:

Approval of this contract will directly support and advance the City Council's goals by allowing Maintenance to continue delivering excellent service (Goal 1) while improving city beautification and appearance (Goals 6 and 7). It represents a strategic step forward in ensuring Newberg remains a well-maintained and welcoming city for all.

RESOLUTION NO. 2025-3978

A Resolution authorizing the City Manager to sign a five (5) year contract with DeSantis Landscapes, with an initial year one (1) contract amount of \$141,228, with an annual escalation rate of 3.5% that may be applied to subsequent years at the contractor's request.

Recitals:

1. The amount of the city's landscape areas, including stormwater detention and treatment facilities that require ongoing maintenance needs, have significantly increased over the past few years, along with the growth of the city.
2. The continued growth of the city, along with the increased maintenance requirements of the city's street, stormwater, wastewater, and water utility systems, have exceeded the ability of the Public Works Maintenance Division to meet the expanding landscaping maintenance needs without reductions to utility service, or additional FTE's.
3. Outsourcing landscape maintenance instead of additional FTE's to meet the landscaping maintenance needs and requirements has been determined to be the most financially cost method to meet these needs and maintain existing utility maintenance and service levels.
4. DeSantis Landscapes has provided a bid to provide the City with landscape services at \$141,228 for the initial year of a five (5) year contract, with an annual escalation rate of 3.5% that may be applied at the contractor's request.
5. The City retains the right to add or remove service areas throughout the term of the contract in response to budget constraints or operational needs.
6. Contracted landscaping services will provide efficient and consistent landscape management, enhance the city's visual appeal, improve safety, and contribute to a cleaner, more attractive community, addressing city council goals #1, #6, and #7.
7. Funding for contracted landscape maintenance services has been allocated in the approved FY 2025-2027 bi-annual budget cycle.

The City of Newberg Resolves as Follows:

1. The City Council hereby authorizes the City Manager to award the landscape maintenance contract to DeSantis Landscapes.

2. The City Council further authorizes the City Manager to sign a multi-year contract with DeSantis Landscapes, with an initial contract amount of \$141,228 for the first year. An annual escalation rate of 3.5% may be applied to subsequent years at the contractor's request.

Effective Date of this resolution is the day after the adoption date, which is: _____, 2025.

Adopted by the City Council of Newberg, Oregon, this _____ day of _____, 2025.

Rachel Thomas, City Recorder

Attest by the Mayor this _____ day of _____, 2025.

Bill Rosacker, Mayor

REQUEST FOR COUNCIL ACTION



Date Action Requested: June 16, 2025

Order <input type="checkbox"/> Ordinance <input type="checkbox"/> Resolution <input type="checkbox"/> Motion <input type="checkbox"/> Information <input checked="" type="checkbox"/>	
Subject: Street Tree List Update	Staff: Scot Siegel and Leanne Wagener Department: Community Development Department File No. n/a
Business Session	Order On Agenda: New Business

Is this item state mandated? Yes ☐ No ☒

If yes, please cite the state house bill or order that necessitated this action: n/a

Recommendation:

1. Receive presentation from staff of the proposed “City of Newberg Approved Street Tree List”.
2. Provide direction to staff on drafting code amendments to make tree replacement criteria clear in the Newberg Municipal Code Section 12.05.260 (E).

“E. The designated staff person may require that the tree removed be replaced with a tree in accordance with an approved street tree plan or from the city’s approved street tree list.”

Background: The City of Newberg is using an outdated and limited preferred street tree list from the year 1992, that is not in keeping with current urban forestry best practices. Staff seeks to provide development stakeholders and residents with more appropriate and context sensitive options for tree species selection and placement guidance. (See Attachment 1.)

Staff also seeks to amend Newberg Municipal Code (NMC) Chapter 12 *Street and Sidewalks*, to make the street tree replacement requirements clearer, including specifying that tree replacement is required when a street tree planting area would become deficient based on the tree spacing standards in NMC Chapter 15.420. Making this explicit in the code would provide greater certainty for abutting property owners, who are responsible for tree maintenance, and align with standard operating procedures for tree removal permits.

Subsequent to the City Council meeting held on August 5, 2024, based on one public comment, planning staff was directed to pause all tree replacements that would have been processed as part of a tree removal

permit for properties that were not governed by a subdivision approval or approved landscape plan. Tree replacement continues to be required when tree removal permits are approved for properties that are governed by an approved landscape plan. Additionally, as directed by the City Manager, the City of Newberg replaces street trees that it removes for street and utility maintenance, and capital projects, including those in the downtown area and elsewhere.

Fiscal Impact: None.

Council Goals:

The proposed community project may align with the following goals:

- Goal 1: Continue to create and maintain a high level of customer service.
- Continuous Goal A: Ensure Newberg infrastructure (roads, water, city employees) is in good repair and supply.
- Continuous Goal D: Develop ways to help tourism and the wine industry flourish.

Attachment1: Proposed “City of Newberg Approved Street Tree List”

ATTACHMENT 1
Proposed “City of Newberg Approved Street Tree List”

ATTACHMENT 1
Proposed “City of Newberg Approved Street Tree List”

City of Newberg Approved Street Tree List

Adopted XXXX XX, 2025



Purpose

The purpose of this document is to provide guidance on appropriate trees for Newberg's urban and suburban spaces (outside of the downtown), namely within the right-of-way, such as planter strips, adjacent to curb-tight sidewalks, and medians. Similarly, these trees are also appropriate for parking lots and our commercial or multi-family developments. These conditions often present competition for space with adjacent utilities and resources, such as water and cooler air temperatures.

With this in mind, the City has selected tree species that are better able to perform and thrive in these conditions while providing beautification and ecosystem services which are vital to our environment. Consideration for pest and disease resistance, invasive potential, hardiness, and maintenance were also prioritized.

It should also be noted that this list is not all-inclusive as new and improved cultivars are in constant production. Likewise, some species that were not initially invasive may become so over time, or a new pest or pathogen may become an unfortunate occurrence. Residents and project stakeholders are therefore encouraged to reach out to planning staff with questions about other potential species or cultivars for consideration of placement.

CONTACT

Planning Division

email: planning@newbergoregon.gov

ph: 503537-1240

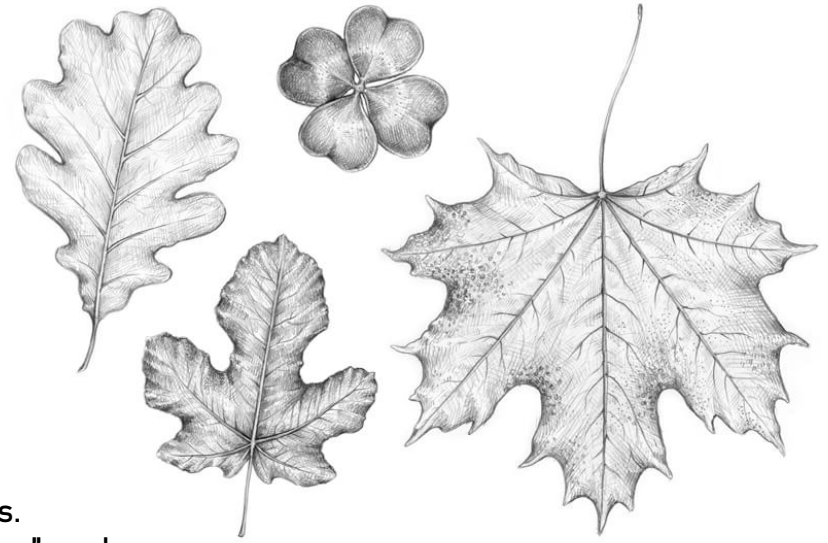
in-person: 414 E First ST, Newberg, OR 97132



General Information

This list is intended to give the best opportunity at getting the **RIGHT TREE IN THE RIGHT PLACE**, and will evolve as more data becomes available to update best urban forestry practices. Please also consider the following:

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- Note that many tree species have cultivars that are similar in form and features. Those species that have acceptable multiple cultivars are noted with “and similar”, and alternatives must reflect the general size and characteristics of the named cultivar.



Tree List Codes

Scientific and Common Names: Note that some trees have more than one common name and that it is important to know the scientific (botanical) name to ensure correct species and varietal at the time of acquisition.

Minimum Planting Width and Length: Minimum planting widths and lengths are measured from back of curb and/or sidewalk to same, other flatwork, or property line. The distances specified are intended to denote an area free of obstructions, such utility boxes, drainage features, meters, etc. Tree species must match the specified minimum widths and lengths (ideally centered within), excepting downtown Newberg.

Tolerances of Wet and Clay Soils: Species that can tolerate clay soils are denoted with the letter “C”. Species that tolerate poor drainage, seasonal wetness or moist soils are denoted with a “Y”. Those that cannot tolerate either condition are denoted with the letter “N”.

Drought Tolerance: Each species has an indication of drought tolerance with a range of “Y” for high, “Moderate” for a mid-level of tolerance, or “N” for negligible or no drought tolerance.

Power line Friendly: Tree species that are allowed under power lines are denoted with a “Y” for yes or an “N” for no suitability.

Deciduous or Evergreen: Deciduous trees are denoted with a “D”, and evergreen species are denoted with an “E”.

Small Trees: trees with mature heights of less than 35 feet

Scientific Name	Common Name	Minimum Planting Width	Minimum Planting Length	Tolerates Poor Drainage/Clay	Drought Tolerant	Power line Friendly	Deciduous/ Evergreen
<i>Acer buergerianum</i>	Tident Maple	4'	8'	N	Moderate	Y	D
<i>Acer campestre</i>	Hedge Maple	4'	8'	N	Moderate	Y	D
<i>Acer grandidentatum</i>	Bigtooth Maple	4'	10'	C	Moderate	Y	D
<i>Acer griseum</i>	Acer griseum	4'	10'	C	N	Y	D
<i>Carpinus caroliniana</i> (standard)	American Hornbeam	4'	10'	Y/C	N	Y	D
<i>Cercis canadensis</i> var. <i>texensis</i> (and similar)	Oklahoma Redbud	3'	8'	C	Moderate	Y	D
<i>Chioanthus retusus</i>	Chinese Fringetree	3'	8'	C	N	Y	D
<i>Chioanthus virginicus</i>	White Fringetree	3'	8'	C	N	Y	D
<i>Cornus mas</i>	Corneilian Cherry Dogwood	3'	8'	C	Moderate	Y	D
<i>Crataegus x lavalleyi</i>	Lavalle Hawthorn	4'	10'	C	Y	Y	D
<i>Koelreuteria paniculata</i>	Golden Raintree	4'	10'	N	N	Y	D
<i>Liriodendron tulipifera</i> 'Little Volunteer'	Little Volunteer Tuliptree	4'	10'	N	N	Y	D
<i>Maackia amurensis</i>	Amur Maackia	4'	10'	N	N	Y	D
<i>Maclura pomifera</i> 'White Shield'	White Shield Osage Orange	4'	12'	Y/C	Y	Y	D
<i>Magnolia</i> 'Elizabeth'	Elizabeth Magnolia	5'	10'	C	N	Y	E
<i>Magnolia grandiflora</i> 'Victoria' (and similar)	Victoria Southern Magnolia	5'	10'	C	N	Y	E
<i>Magnolia</i> 'Galaxy'	Galaxy Magnolia	5'	8'	C	N	Y	E

Small Trees: trees with mature heights of less than 35 feet

Scientific Name	Common Name	Minimum Planting Width	Minimum Planting Length	Tolerates Poor Drainage/Clay	Drought Tolerant	Power line Friendly	Deciduous/ Evergreen
<i>Magnolia x loebneri</i> (standard)	Loebner Magnolia	5'	8'	C	N	Y	E
<i>Magnolia virginiana</i> (standard)	Sweetbay Magnolia	4'	8'	Y	N	Y	E
<i>Malus tschonoskii</i>	Tschonoskii Crabapple	3'	8'	N	N	Y	D
<i>Parrotia subaequalis</i> (standard)	Chinese Parrotia	4'	8'	C	Moderate	Y	D
<i>Pistachia chinensis</i> (standard)	Chinese Pistache	4'	10'	C	Y	Y	D
<i>Quercus myrsinifolia</i> (standard)	Bamboo-leaf Oak	4'	10'	C	Y	Y	E
<i>Sorbus hybrida</i>	Oak-Leaf Mountain Ash	4'	10'	N	Moderate	Y	D
<i>Styrax japonicus</i>	Japanese Snowbell	3'	8'	N	N	Y	D
<i>Styrax obassia</i>	Fragrant Snowbell	3'	8'	N	N	Y	D
<i>Syringa reticulata</i>	Japanese Tree Lilac	3'	8'	C	N	Y	D
<i>Tilia cordata</i> 'Halka'	City Sprite Linden	4'	8'	C	N	Y	D
<i>Zelkova serrata</i> 'JFS-KW1'	City Sprite Zelkova	4'	10'	C	Moderate	Y	D
<i>Zelkova serrata</i> 'Schmidtow'	Wireless Zelkova	4'	12'	C	Moderate	Y	D

Medium Trees: trees with mature heights of less than 55 feet

Scientific Name	Common Name	Minimum Planting Width	Minimum Planting Length	Tolerates Poor Drainage/Clay	Drought Tolerant	Power line Friendly	Deciduous/ Evergreen
<i>Betula nigra</i> 'BNMTF'	Dura Heat River Birch	5'	10'	Y	N	N	D
<i>Betula nigra</i> 'Cully'	Heritage River Birch	5'	10'	Y	N	N	D
<i>Carpinus betulus</i>	European Hornbeam	5'	15'	Y/C	N	N	D
<i>Celtis occidentalis</i>	Common Hackberry	6'	15'	C	Y	N	D
<i>Cladrastis kentukea</i>	American Yellowwood	6'	15'	N	N	N	D
<i>Corylus colurna</i> (standard)	Turkish Hazel	4'	10'	C	Y	N	D
<i>Corylus fargesii</i> (standard)	Farges Hazelnut	5'	10'	C	Y	N	D
<i>Eucommia ulmoides</i>	Hardy Rubber Tree	6'	15'	N	Moderate	N	D
<i>Ginkgo biloba</i> 'Autumn Gold'	Autumn Gold Ginkgo	4'	15'	C	Moderate	N	D
<i>Ginkgo biloba</i> 'Halka'	Halka Ginkgo	5'	15'	C	Moderate	N	D
<i>Ginkgo biloba</i> 'JFS-UGA2'	Golden Colonnade Ginkgo	4'	12'	C	Moderate	N	D
<i>Ginkgo biloba</i> 'Maygar'	Maygar Ginkgo	5'	15'	C	Moderate	N	D
<i>Ginkgo biloba</i> 'Saratoga'	Saratoga Ginkgo	5'	15'	C	Moderate	N	D
<i>Ginkgo biloba</i> 'Shangri-la'	Shangri-la Ginkgo	4'	12'	C	Moderate	N	D
<i>Gleditsia triacanthos</i> 'Shademaster'	Shademaster Honeylocust	6'	10'	C	Y	N	D
<i>Gleditsia triacanthos</i> 'Skyline'	Skyline Honeylocust	6'	15'	C	Y	N	D
<i>Gymnocladus dioica</i> 'Espresso' (similar male)	Espresso Kentucky Coffee Tree	6'	15'	C	Y	N	D

Medium Trees: trees with mature heights of less than 55 feet

Scientific Name	Common Name	Minimum Planting Width	Minimum Planting Length	Tolerates Poor Drainage/Clay	Drought Tolerant	Power line Friendly	Deciduous/ Evergreen
<i>Maclura pomifera</i> 'White Shield' (similar male only)	White Shield Osage Orange	5'	12'	C	Y	N	D
<i>Magnolia grandiflora</i> 'Bracken's Brown Beauty' (and similar)	Bracken's Black Beauty Southern Magnolia	6'	15'	C	N	N	E
<i>Nyssa sylvatica</i>	Black Tupelo	4'	15'	Y/C	N	N	D
<i>Ostrya virginiana</i>	American Hophornbeam	4'	15'	N	N	N	D
<i>Parrotia persica</i>	Persian Parrotia	4'	12'	C	Moderate	N	D
<i>Picea omorika</i>	Siberian Spruce	6'	15'	N	N	N	E
<i>Pinus flexilis</i> 'Vanderwolf's Pyramid'	Vanderwolf's Pyramid Limber Pine	6'	15'	N	Moderate	N	E
<i>Quercus hypoleucoides</i> (standard)	Silverleaf Oak	5'	12'	C	Y	N	E
<i>Quercus muehlenbergii</i>	Chinkapin Oak	6'	15'	C	Moderate	N	E
<i>Quercus phellos</i>	Willow Oak	8'	15'	C	Moderate	N	D
<i>Quercus x bimundorum</i> 'Crimschmidt' (and similar)	Crimson Spire Oak	4'	10'	C	Moderate	N	D
<i>Styphnolobium japonicum</i> 'Millstone'	Millstone Japanese Pagodatree	5'	10'	N	Y	N	D
<i>Tilia americana</i> 'Redmond'	Redmond American Linden	5'	12'	C	Moderate	N	D
<i>Tilia cordata</i> 'PNI 6025'	Greenspire Littleleaf Linden	5'	15'	C	Moderate	N	D

Medium Trees: trees with mature heights of less than 55 feet

Scientific Name	Common Name	Minimum Planting Width	Minimum Planting Length	Tolerates Poor Drainage/Clay	Drought Tolerant	Power line Friendly	Deciduous/ Evergreen
<i>Tilia cordata x mongolica</i> 'Harvest Gold'	Harvest Gold Linden	4'	12'	C	Moderate	N	D
<i>Tilia tomentosa</i> 'Sterling'	Sterling Silver Linden	5'	12'	C	Moderate	N	D
<i>Ulmus</i> 'Patriot'	Patriot Elm	6'	15'	C	Moderate	N	D
<i>Ulmus x</i> 'Frontier'	Fontier Elm	4'	10'	C	N	N	D
<i>Ulmus parvifolia</i>	Lacebark Elm	6'	15'	C	Moderate	N	D
<i>Ulmus propinqua</i> 'JFS-Bieberich'	Emerald Sunshine Elm	4'	10'	C	Y	N	D
Zelkova serrata 'Green Vase'	Green Vase Zelkova	5'	15'	C	Moderate	N	D
Zelkova serrata 'Village Green'	Village Green Zelkova	4'	12'	C	Moderate	N	D

Large Trees: trees with mature heights of more than 55 feet

Scientific Name	Common Name	Minimum Planting Width	Minimum Planting Length	Tolerates Poor Drainage/Clay	Drought Tolerant	Power line Friendly	Deciduous/ Evergreen
<i>Catalpa speciosa</i>	Northern Catalpa	6'	12'	C	N	N	D
<i>Ginkgo biloba</i> (male only)	Ginkgo	6'	12'	C	Y	N	D
<i>Liriodendron tupipifera</i>	Emerald City						
'Emerald City'	Tuliptree	6'	12'	N	N	N	D
<i>Quercus accutissima</i>	Sawtooth Oak	6'	15'	N	Y	N	D
<i>Quercus bicolor</i>	Swamp White Oak	8'	18'	Y	N	N	D
<i>Quercus coccinea</i>	Scarlet Oak	8'	18'	C	Y	N	D
<i>Quercus douglasii</i>	Blue Oak	6'	12'	N	Y	N	D
<i>Quercus frainetto</i>	Hungarian Oak	6'	15'	N	Y	N	D
<i>Quercus ilex</i>	Holly Oak	6'	12'	N	N	N	E
<i>Quercus kelloggii</i>	California Black Oak	8'	15'	N	Y	N	D
<i>Quercus lyrata</i>	Overcup Oak	8'	15'	Y	Y	N	D
<i>Quercus nutallii</i> (Q. texana)	Nuttall Oak	8'	18'	Y	Y	N	D
<i>Quercus robur</i> 'Fastigiata' (and similar)	Upright English Oak	5'	12'	Y	Y	N	D
<i>Quercus rubra</i>	Red Oak	9'	18'	N	Y	N	D
<i>Quercus shumardii</i>	Shumard Oak	8'	18'	N	Y	N	D
<i>Quercus suber</i>	Cork Oak	8'	18'	N	Y	N	E
<i>Tilia americana</i>	American Linden	8'	15'	N	Y	N	D
<i>Tilia tomentosa</i>	Silver Linden	8'	15'	N	Y	N	D
<i>Ulmus americana</i>	Princeton Elm	8'	18'	N	Y	N	D
'Jefferson' (and similar)							

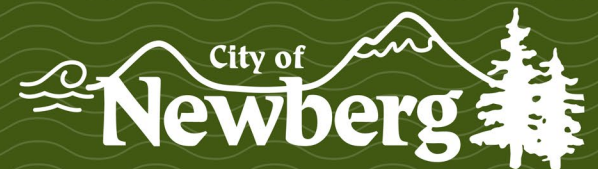
Resources:

Illustrations: Liu Ling @ <https://www.behance.net/gallery/37165241/Trees> and H. L. Groenstein @ <https://wildcatsarts.weebly.com/trees---observational-drawing.html>

Website references include: Oregon State University, North Carolina State University, J. Frank Schmidt & Son, International Dendrology Society, City of Eugene, City of Grants Pass, and City of Portland. Book reference source: Dirr & Warren, 2019, *The Tree Book*, Timber Press, Inc.

Update to Street Tree List and Proposed Code Maintenance

City Council June 16, 2025



Background

- ❖ The City is using an outdated and limited preferred street tree list from the year 1992, that is not in keeping with current urban forestry best practices. Staff seeks to provide more appropriate and context sensitive options for tree species selection and placement guidance.
- ❖ Staff also seeks to amend NMC Chapter 12 to make the street tree replacement requirements clear after removal. The intention is to require replacement when a property would become deficient of the required standard tree spacing as specified in NMC Chapter 15.420.

Typical Issues in the Field



Typical Issues in the Field



- ❖ Resident applied for tree removal permit
- ❖ Neighborhood subdivision had prescriptive tree species requirements
- ❖ Resident removed tree including stump with an approved permit
- ❖ Resident sought staff guidance on species varietal and placement
- ❖ Resident successfully sited replacement tree



Comparison of List Attributes

Old “Preferred List”

- ❖ Has limited tree species
- ❖ Has species that are now under quarantine
- ❖ Has some species that are not tolerant of urban conditions
- ❖ Has some species that are not widely recommended as street trees
- ❖ Lacks selection and placement guidance

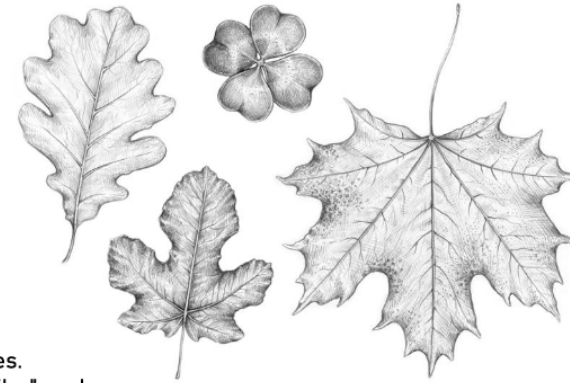
Updated “Approved List”

- ❖ Has more robust options, especially for small and medium-sized trees
- ❖ Offers selection of trees that are hardy, resistant to disease, and lower maintenance
- ❖ Has species that are well-adapted to urban conditions
- ❖ Offers pertinent information that guides appropriate selection and placement
- ❖ Has hyperlinks to informational website resources

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- Size and spacing of trees at installation must match the applicable Newberg Municipal Code sections.
- Optimal tree planting is from October 15th to April 15th excepting adverse weather events.
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- Note that many tree species have cultivars that are similar in form and features. Those species that have acceptable multiple cultivars are noted with "and similar", and alternatives must reflect the general size and characteristics of the named cultivar.



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<i>Acer campestre</i>	Hedge Maple	4'	8'	N	Moderate	Y	D
<i>Acer grandidentatum</i>	Bigtooth Maple	4'	10'	C	Moderate	Y	D
<i>Acer griseum</i>	Acer griseum	4'	10'	C	N	Y	D
<i>Carpinus caroliniana</i> (standard)	American Hornbeam	4'	10'	Y/C	N	Y	D
<i>Cercis canadensis</i> var. <i>texensis</i> (and similar)	Oklahoma Redbud	3'	8'	C	Moderate	Y	D
<i>Chioanthus retusus</i>	Chinese Fringetree	3'	8'	C	N	Y	D
<i>Chioanthus virginicus</i>	White Fringetree	3'	8'	C	N	Y	D
<i>Cornus mas</i>	Corneilian Cherry Dogwood	3'	8'	C	Moderate	Y	D
<i>Crataegus x lavalleyi</i>	Lavalle Hawthorn	4'	10'	C	Y	Y	D
<i>Koelreuteria paniculata</i>	Golden Raintree	4'	10'	N	N	Y	D
<i>Liriodendron tulipifera</i> 'Little Volunteer'	Little Volunteer Tuliptree	4'	10'	N	N	Y	D
<i>Maackia amurensis</i>	Amur Maackia	4'	10'	N	N	Y	D
<i>Maclura pomifera</i> 'White Shield'	White Shield Osage Orange	4'	12'	Y/C	Y	Y	D
<i>Magnolia</i> 'Elizabeth'	Elizabeth Magnolia	5'	10'	C	N	Y	E
<i>Magnolia grandiflora</i> 'Victoria' (and similar)	Victoria Southern Magnolia	5'	10'	C	N	Y	E
<i>Magnolia</i> 'Galaxy'	Galaxy Magnolia	5'	8'	C	N	Y	E

Landscape Plants

About Latin Names Common Names Woody Plants of Oregon Woody Plant Search ▼ Additional Information ▼

Acer griseum

Common name: Paperbark Maple

Pronunciation: A-ser GRIS-e-um

Family: Sapindaceae, Aceraceae

Genus: *Acer*

Type: Broadleaf

Native to (or naturalized in) Oregon: No

- › Broadleaf deciduous tree, 20-30 ft (6-9 m), upright, oval, very attractive copper-red bark, exfoliates, paper-like. Leaves opposite, compound (trifoliate i.e., 3 leaflets), 7-13 cm long, middle leaflet short stalked and coarsely toothed, lateral leaflets nearly without a stalk and not as toothed, blue-green above, pale green to whitish below; petiole pubescent. Fall color may range from green, red-brown, to a striking red. Flowers greenish-yellow, small, in 2.5 cm long clusters, appear as leaves expand. Fruit (samara) 2.5-3 cm long, wings diverge at a 60-90° angle, persisting into winter, nutlet often empty.
- › Sun to part shade. Adaptable to varied soils, prefers well-drained and moist soils, but performs well in clay soils; pH adaptable. Can even be used in **bonsai**.
- › Hardy to USDA Zone 4 Native to Central China.
- › *griseum*: gray, referring to the underside of leaves.
- › Oregon State Univ. campus: north of Cordley, next to *Acer circinatum*.

Click image to enlarge



Genus *Acer*

<i>Acer buergerianum</i>	› Trident Maple › Three-toothed Maple
<i>Acer buergerianum</i> 'Miyasama yatsubusa'	› Miyasama yatsubusa › Trident Maple
<i>Acer buergerianum</i> 'Streetwise®'	› Streetwise Trident Maple › Streetwise Maple
<i>Acer campestre</i>	› Hedge Maple › Field Maple › Common Maple
<i>Acer campestre</i> 'Carnival'	› Carnival Hedge Maple
<i>Acer campestre</i> 'Nanum'	› Dwarf Hedge Maple
<i>Acer capillipes</i>	› Red Stripebark Maple › Red Snakebark Maple › Hakkoda Maple



Maclura pomifera 'White Shield'

White Shield Osage Orange

USDA Zone: 5



Height:
35'



Spread:
35'

Description:

Both fruitless and thornless, this tough Midwest native was found in western Oklahoma by plantsman Steve Bieberich. The most thornless of the Osage Orange cultivars, this heat and drought tolerant tree has remarkably dark green, glossy foliage.



Requested Staff Direction

Staff is requesting City Council direction on the following:

- Consideration for adopting the proposed “City of Newberg Approved Street Tree List” into ordinance.
- Consider code amendment to make tree replacement criteria clear in the Newberg Municipal Code Section 12.05.260 (E), consistent with established Community Development Department practice.

Rachel Thomas

From: noreply@revize.com
Sent: Friday, June 13, 2025 11:52 AM
To: City Recorder
Subject: New Public Comment
Attachments: City Council 06-16-2025 Street Trees Written Testimony.docx

This email originated from outside the City of Newberg's organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Date = 2025-06-16
Meeting-Body = City Council
Agenda-Item = 8.1 Street Tree List and Replacement Policy Review
Subject-Matter-to-Comment-On =
Name = Robert Soppe
Representing =
Email-Address = [REDACTED]
Phone Number = [REDACTED]
Contact-Info-release[] = Yes
Is-this-a-public-hearing[] = Yes
Written-or-Spoken[] = Written
Written-or-Spoken[] = Spoken
Written-Comment = Please see attached. I also intend to speak in person at the meeting.
Client IP = 50.109.239.145

To the Council:

I must say that I'm amazed and disappointed at how this issue has been drawn out so long.

In December of 2023 I applied for a permit to remove two trees in my planter strips (ROW). With the approval I was told that the trees must be replaced even though there wasn't ever a requirement for them to be planted nor was there a current requirement to add a tree. I thought it unreasonable to add such a requirement.

I raised the issue in February of last year during Public Comments and got no response at all (other than a "thank you"). In a meeting with the Mayor I was informed that I should know that nothing should be expected to happen from issues raised during Public Comments. I was unaware of that. I thought that was exactly one of the purposes of Public Comments. I was also told that I should simply have avoided the entire issue by cutting down our two trees without bothering to get the required permit. I was rather surprised with such a comment from our Mayor.

Following the Mayor's suggestions, this resulted in a meeting with the Community Development Director, multiple City Council members, and an appeal to the Council. I thought that there was no such appeal process, but tried to follow his suggestion anyway. I felt badly that I was using so much staff and Council time on this matter (let alone my own time), but didn't see any other reasonable options.

When the appeal was heard on August 5 last year, The City Manager had a number of comments about the matter. He correctly stated that the Code didn't allow an appeal, consistent with my statements to the Mayor. The CM stated that the Supreme Court case *Sheetz v. County of El Dorado* "does draw into question impairments of this type of their legal validity...". At that meeting it was moved, seconded, and passed (not clear from the video and the minutes are not readily accessible, but I think it was unanimous) that there should be a pause on enforcement "while staff can do a thorough investigation of this code and its intent, its constitutionality in its framework, and then after doing so come back with suggested Code changes...." (my transcription of the audio).

Do you find anything in the RCA or presentation that addresses the constitutionality issue? I don't. If that is to impact the Council's decision, I think that details of what staff determined would be appropriate.

Staff does appear to have come back with the concept of one recommended Code change.

The published presentation states: "Staff also seeks to amend NMC Chapter 12 to make the street tree replacement requirements clear after removal. The intention is to require replacement when a property would become deficient of the required standard tree spacing as specified in NMC Chapter 15.420". I will repeat my previous objection to this intention.

This intention, as echoed in the published staff presentation, would codify a requirement to replace trees that never previously had a requirement to be planted, such as in my case. I strongly oppose that.

Let me be clear again about how this played out for me and for others. 35 years ago when we purchased our house, the planter strips simply had grass and no trees. There was no City requirement then, or now for that matter, that trees must be planted.

In an attempt to improve the appearance of the neighborhood, we chose to plant a number of trees on two of the planter strips.

About 25 or so years later, two of the trees needed to be removed. One was dying and another was damaging the sidewalk. Being a good citizen, I followed City Code and applied for a permit to remove the trees. The Mayor may well have been correct that I would have avoided many problems had I just ignored the Code and removed the trees without a permit, but that's not my way of doing things.

With the approval of the permit, I was informed that I had to replace the trees. I should note that the estimate I received for this from a local company was \$1,500-\$3,000. I objected, spent many hours in meetings, and we eventually ended up where we are today.

Had we never planted the trees in the first place, we'd not be having this discussion and we wouldn't be looking at a \$1,500-\$3,000 expense. The trees weren't required then and are only being required now because we chose to go above and beyond City requirements many years ago and added trees. Does this seem to fit with your Goal 1: "Continue to create and maintain a high level of customer service"? I don't think so.

I think it is clear that if this policy is modified as suggested in the presentation, citizens who are aware of it will be far less likely to voluntarily plant trees in planter strips. The perpetual requirement to replace them would be a burden that many would want to avoid.

I want to be clear that this isn't just about the requirement being placed on our property but the requirement on ALL Newberg properties that fall under this category. In truth, the City Manager stated in last August's meeting that there is no penalty in City Code that can be applied if staff's requirement to replace the trees is not followed. He clarified that in an email to me and it is clear that his interpretation (which I presume had the involvement of the City Attorney) is that we can ignore the requirement that was applied to us and no penalty will result. I don't like taking such an approach, but it is the one that we'll follow if the Code is revised as suggested.

I urge the Council to change the language of 12.05.260(E) to something such as: "The designated staff person shall require that the tree be removed be replaced with a tree following NMC 15.420 only if the tree being removed was initially required to be planted. Otherwise, staff may encourage but not require such a tree replacement."

Thank you for your consideration of my comments.

REQUEST FOR COUNCIL ACTION



Date Action Requested: June 16, 2025

Order ☐ Ordinance ☐ Resolution ☒ Motion ☐ Information ☐

No. 2025-3977

Subject: A Resolution awarding Construction Excise Tax Funds to the Newberg Area Habitat for Humanity in the amount of \$380,615

Staff: Scot Seigel, Community Development Director
Leanne Wagener, Assistant Planner
File No. GRNT25-0001

Business Session

Order On Agenda: New Business

Hearing Type: Public Hearing

Is this item state mandated? Yes ☐ No ☒

If yes, please cite the state house bill or order that necessitated this action:

Recommendation:

1. Adopt Resolution No. 2025-3977 awarding \$380,615 to the Newberg Area Habitat for Humanity from the Construction Excise Tax Fund monies.
2. Provide direction to staff regarding the release of a third Notice of Funding Availability for remaining CET Fund monies.

Executive Summary:

In response to the City's 2024-2025 Notice of Funding Availability (NOFA) for the Newberg Construction Excise Tax (CET) Fund, three applications were considered for funding awards. Of the three submitted, the Affordable Housing Commission is recommending that one Applicant be awarded fund monies, the Newberg Area Habitat for Humanity, with a recommended award of \$380,615.

The application materials submitted by the Newberg Area Habitat for Humanity and the SPARK project, which is not being recommended for award monies, are provided in Exhibits A and B, respectively. The Heart of Newberg application put forward by Catholic Charities of Oregon, Edlen & Company, Community Wellness Collective, in partnership with Providence, is not included as the Applicants for this project were nonresponsive at the time of deliberation and therefore were not recommended for funding by the Affordable Housing Commission. Additionally, the application was later withdrawn on May 5, 2025.

Staff is also seeking direction on a potential third round NOFA for any remaining CET funds at a date to be determined by Council. For budgeting purposes, if a third NOFA is desired it should be issued during the current 2025-2027 biennium.

Background:

On January 11, 2024, the City of Newberg published a CET NOFA that closed on April 4, 2024. Two eligible applications were submitted for the FY2023-2024 first round disbursal, one from Yamhill County Affordable Housing Corporation requesting \$262,500, and one from Catholic Charities of Oregon et al. requesting \$397,050 with consideration for the second (Legacy) disbursal.

City staff calculated the available award allocations of the CET Fund monies pursuant to Newberg Municipal Code Chapter 3.60 and with prior direction from the Newberg City Council to retain specified funding for a second (Legacy) disbursal in the amount of \$1,000,000.

On April 23, 2024, the Newberg Affordable Housing Commission held a public meeting to review and discuss the applications against the approved criteria. The Commission recommended that Yamhill County Affordable Housing Corporation be awarded the amount of \$262,500 from the CET Fund first round allocation, and that the Catholic Charities of Oregon et al. be awarded the remainder of the first round CET fund monies, which were later determined to be up to \$48,238.35.

On August 19th, 2024, planning staff presented the Affordable Housing Commission's recommendation for the first round CET Fund allocations for the 2023-2024 fiscal year to City Council. Staff presented the recommended award allocation of \$262,500 to the Yamhill County Housing Corporation, and the remaining CET fund monies available from the first disbursal round to Catholic Charities of Oregon, Edlen & Company and Community Wellness Collective in partnership with Providence, in the amount of \$48,238.35. During Council deliberations it was decided that the entirety of the first round disbursal monies would be awarded to the Yamhill County Housing Corporation (YCHC) in the amount of \$310,738.35, pending award acceptance. Subsequent to the August 19th meeting, YCHC agreed to accept the total award of \$310,738.35. Contract documents reflecting this award were executed on February 14, 2025. Staff also received City Council direction on issuing a second notice of funding availability for use of the remaining \$1,000,000 of CET funds for what Council has described as a "Legacy Project". The Legacy NOFA for CET Funds was posted November 14, 2024.

Construction Excise Tax in Newberg:

The City of Newberg adopted a Construction Excise Tax in November of 2020, pursuant to Oregon Senate Bill 1533 (2016) which allows local jurisdictions to implement a Construction Excise Tax (CET). Revenues generated from this tax equaled 1% of the project building permit value and are to be used to address housing affordability issues for homeowners or renters within Newberg for families that earn 80% or less of the median family income. The CET ended when the City Council repealed the tax and directing that CET funds collected during be refunded on request pursuant to stipulated refund timeframe in NMC 3.60.080.

The City of Newberg defines affordable housing as residential housing primarily for households or persons earning 80% or less of the Median Family Income (MFI) and where housing and/or rental costs do not constitute more than 30% of a household's income. For 2023, the Median Family Income (for a family of 4) in the City of Newberg was \$114,400. 80% of that amount for a family of four is \$91,520.

Available CET 24-25 Funding and Eligibility:

Eligible recipients of resources from the CET Fund are organizations with interests in developing and/or preserving affordable housing in Newberg. Potential recipients include governmental subdivisions, community development corporations, local housing authorities, community action agencies, community-based or neighborhood-based non-profit housing organizations, other nonprofit organizations, for-profit entities and private employers, and private landlords.

The funds received through the CET can be used in a variety of ways, with some limitations, and for projects that address housing affordability issues for homeowners or renters within Newberg for households that earn 80% or less of the median family income (MFI). The ordinance also states that any affordable housing that receives CET funds must remain affordable (80% or below MFI) for a period of at least 60 years following the date of construction.

State law limits the funding awards towards two categories:

- Developer incentives and
- Affordable housing programs

Per ORS 197.309(5)(c) and (d) and 197.309(7), *developer incentives* allowed or offered include, but are not limited to:

- System development; and
- Land acquisition; and
- Local public improvements required by municipal governments.

Per Section 9, Chapter 59, Oregon Laws 2016, *affordable housing programs* include, but are not limited to:

- Rent buy-downs and subsidies; and
- Down-payment assistance; and Newberg Community Development
- Foreclosure-prevention assistance.

Available CET fund monies for the current disbursal to these uses total approximately \$1,000,000.00. This disbursal amount reflects the total eligible refunds subtracted from the fund within the stipulated refund timeframe per NMC 3.60.080 as well as the first-round disbursal of \$310,738.35.

Submitted Applications:

Notice went out about the 2024-2025 CET Legacy NOFA on November 14, 2024. The application period closed on April 1, 2025, and three applications were submitted prior to the deadline. The submitted project details were:

1. Project: 1201 E Fifth Street Attached Duplex (Exhibit A)
Applicant: Newberg Area Habitat for Humanity
Funding Request: \$380,615
Form of Funding Requested: CET - Developer Incentive
Project Description: Creation of two new single-family homes to be sold at affordable prices to first-time homebuyers.
2. Project: SPARK Newberg (Exhibit B)
Applicant: SPARK Newberg
Funding Request: \$1,000,000
Form of Funding Requested: CET – Developer Incentive
Project Description: Creation of up to 20 dwelling units for qualifying participants of a SPARK curriculum of education and community involvement.
3. Project: The Heart of Newberg (Carried forward from the 2023-2024 NOFA per City Council)
Applicant: Catholic Charities of Oregon, Edlen & Company, Community Wellness Collective in partnership with Providence
Funding Request: \$1,000,000
Form of Funding Requested: CET – Developer Incentive
Project Description: A comprehensive affordable housing project including recuperative, permanent supportive, and workforce housing to be built in two phases on a greenfield site to be donated by Providence, within Newberg.

Review and Discussion:

The Affordable Housing Commission convened on April 22, 2025, to review and discuss the submitted applications. During deliberations, it was deemed that one Applicant, The Newberg Area Habitat for Humanity, qualified for the 2024-2025 CET Legacy Fund disbursement.

It was deemed that the SPARK Newberg application did not meet qualifying thresholds according to the approved scoring criteria, and that The Heart of Newberg was not a viable candidate due to non-responsiveness to City staff communication efforts. The Heart of Newberg later withdrew their application on May 5, 2025, after the Commission had finalized its recommendation.

After deliberation, the Commission agreed by a unanimous vote to recommend to City Council that the Newberg Area Habitat for Humanity be awarded the full amount requested for their project. The Commission's findings and complete recommendation are provided below.

Affordable Housing Commission Findings and Recommendation

The Affordable Housing Commission recommended on April 22, 2025:

1. Not to award fund monies to Catholic Charities of Oregon et al. due to noncommunication status with City staff but they may be considered for a future CET NOFA with a renewed application.
2. To fully fund the Newberg Area Habitat Humanity's application request and not to exceed the amount of \$380,615 in order that funds remain for an additional NOFA.
3. To not fund the SPARK Newberg project due to not meeting minimum threshold criteria.
4. To make a third round CET NOFA posting at the next available opportunity.

Fiscal Impact:

Funds are available within budgeted *Special Payments* of the Economic Development Fund (#14-9130) for the recommended awards and summarized in the table below. Due to the issuance of refunds towards the end of FY 23/24, a Supplemental Budget was required to reconcile funding allocations for the CET Fund. The following table summarizes the prior and proposed CET fund disbursements.

Account Number (Description)	Budgeted 24/25 (\$)	Recalculated for Supplemental Budget (\$)	Disbursed Awards (\$)	Proposed Awards (\$)
14-9130-605001 (Developer Incentives)	408,345.00	411,831.90		380,615
14-9130-605002 (Oregon Housing & Community Services Department)	122,503.00	123,549.57		
14-9130-605003 (Developer Incentives & Affordable Housing Programs)	988,507.00	898,906.45	310,738.35	
Total	1,519,553.00	1,434,287.87	310,738.35	741,394.52

Council Goals:

Goal G6: Implement a careful and prudent fiscal policy. Objective 4: Ensure that the city has a long-term financial plan that supports its goals and objectives.

Exhibits:

- A. Newberg Area Habitat for Humanity Application
- B. SPARK Project Application

RESOLUTION No. 2024-3941

A RESOLUTION AWARDING FY 24-25 CONSTRUCTION EXCISE TAX FUNDS TO THE NEWBERG AREA HABITAT FOR HUMANITY IN THE AMOUNT OF \$380,615.

Recitals:

1. On January 11, 2024, the City of Newberg published a Construction Excise Tax (CET) Notice of Funding Availability (NOFA) that closed on April 4, 2024. Two eligible applications were submitted for the FY 2023-2024 first round disbursal.
2. The City of Newberg received an eligible application from Yamhill County Affordable Housing Corporation with a program request allocation for \$262,500. The City also received an eligible application from Catholic Charities of Oregon et al. with a project request allocation of \$397,050 with consideration for the second (Legacy) disbursal.
3. City staff calculated the available award allocations of the CET Fund monies pursuant to Newberg Municipal Code Chapter 3.60 and with prior direction from the Newberg City Council to retain specified funding for a second (Legacy) disbursal.
4. On April 23, 2024, the Newberg Affordable Housing Commission held a public meeting to review and discuss the applications against the approved criteria. The Commission recommended that Yamhill County Affordable Housing Corporation be awarded the amount of \$262,500 from the CET Fund first round allocation, and that the Catholic Charities of Oregon et al. be awarded the remainder of the first round CET fund monies, which were later determined to be up to \$48,238.35.
5. On August 19th, 2024, City Council awarded the Yamhill County Affordable Housing Corporation \$310,738.35 for their affordable housing program. Council also gave staff direction to post the CET Legacy NOFA in November of 2024.
6. On November 14, 2024, the City of Newberg published a CET Legacy NOFA that closed on April 1, 2025. One eligible application was submitted for the FY 2024-2025 Legacy round disbursal.
7. The City of Newberg received an eligible application from the Newberg Area Habitat for Humanity with a project request allocation of \$380,615.
8. On April 22, 2025, the Newberg Affordable Housing Commission held a public meeting to review and discuss the submitted applications against the approved criteria. The Commission recommended that the Newberg Area Habitat for Humanity be awarded the amount of \$380,615 from the CET Fund Legacy allocation.

The City of Newberg Resolves as Follows:

1. Newberg Area Habitat for Humanity is awarded \$380,615 from the CET Fund Legacy round disbursal.
2. The City Manager, in consultation with the City Attorney, shall finalize the City of Newberg CET Fund Legacy round allocation contract.

Effective Date of this resolution is the day after the adoption date, which is: August 20, 2024.

Adopted by the City Council of Newberg, Oregon, this 16th day of June 2025

City Recorder

Attest by the Mayor this 16th day of June 2025.

Bill Rosacker, Mayor

EXHIBIT A
Newberg Area Habitat for Humanity Application



Newberg Construction Excise Tax (CET) Funding Request Application

NOTE: The second round of applications are due April 1, 2025 at 4:30 p.m.

Applications are to be submitted to Leanne Wagener, Assistant Planner by email at leanne.wagener@newbergoregon.gov or by postal mail via City of Newberg, PO Box 970, Newberg, Oregon, 97132 or by hand delivery to City Hall, 414 E First Street.

CONTACT INFORMATION:

Project Name: 1201 E 5th Street Attached Duplex	
Organization Name: Newberg Area Habitat for Humanity	<input type="checkbox"/> For-profit <input checked="" type="checkbox"/> Non-profit
Contact Name/Title: Shannon Selah / Executive Director	
Mailing Address: PO Box 118 Newberg	State/Zip: Oregon 97132
Phone: 503-537-9938	Email: shannon@newberghabitat.org

PROJECT INFORMATION:

Total project cost:	\$1,060,515
Requested amount of CET funding:	\$380,615
Has this project requested or will request funds from the Affordable Housing Trust Fund?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Amount requested: _____
Amount and description of other matching funds being contributed to the project, if applicable: _____	
Has this organization received Newberg CET funds in the past?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Amount received: _____

Project Partners and their Contributions to the Project:	The following companies provided donated materials or labor: Hampton Plumbing; Ken Bowers/Bowers Concrete; DeMoss and GutterMan; Parr Lumber; Sherwin Williams; JB Insulation; Schneider Electric.
NAHFH also partners with the Housing Authority of Yamhill County to provide HUD-Certified financial counseling and first-time homebuyer education.	

Estimated project beginning date: April 2025	Completion date: August 2026
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COMMUNITY DEVELOPMENT
PLANNING DIVISION
(503) 537-1240
planning@newbergoregon.gov

Please see next page

Please briefly describe the affordable housing problem this project is trying to solve and how it helps in solving that challenge:

This project addresses the lack of affordable homes for sale in Newberg, Oregon. To solve the issue, this project will create two new single-family homes to be sold at affordable prices to first-time homebuyers. Another affordable housing problem is an inadequate stock of permanently affordable homeownership. The homes built by this project will be sold using a shared equity model to ensure the homes remain in the affordable housing market in perpetuity. To create lasting homeownership for the first-time homebuyers partnered with Newberg Area Habitat for Humanity (NAHFH), homebuyers participate in financial and homeowner education courses prior to the sale of their homes. Additionally, NAHFH helps to serve those who are most underrepresented in homeownership. Currently, Fourteen of the nineteen households currently holding Habitat mortgages in Newberg are led by Black, Indigenous, Latinx, and people of color.

Please attach additional information that describes how this project will address the Competitive Awards Selection Criteria described in “Attachment A” of this form, including additional documentation/evidence as needed.

☒ Information that addresses Competative Selection Criteria, attached (please select)

Briefly describe what is attached:

Attached documents include a narrative to address Competitive Selection Criteria (NAHFH Attachment A), project budget (1201 E 5th Budget), evidence of site control (NAHFH Evidence of Site Control), NAHFH's ground lease template, and NAHFH financial statements (NAHFH 990; NAHFH Audits).

ATTACHMENT A

Construction Excise Tax (CET) Fund FY 2024-2025 Competitive Selection Criteria

Minimum Threshold Criteria	Potential Points
1. The project is considered an eligible use or activity under Section 3, and benefits households earning less than 80% of the median family income for a period of at least 60 years following the date of construction (threshold verification)*.	NA
2. The project is ready for implementation with documentation to demonstrate financial feasibility.	NA
3. If the project includes the acquisition of property, the identified property is currently available for acquisition and the applicant has secured either a purchase option or letter of interest from the seller. If the applicant is also applying for federal funding, review procurement requirements and limitations before obtaining a purchase option.	NA
4. That relocation of existing residents will be minimized, and when necessary, the applicant has included accurate relocation assistance costs as part of the project pro forma.	NA
5. The proposal demonstrates that the Construction Excise Tax (CET) Funds are the most appropriate funding source for the project. Provide a description of a financing gap that includes funding sources or demonstrates budget constraints that limit the ability to pay or finance projects.	NA
Scored Application Criteria	
7. The project provides new affordable housing, or new affordability, through retention or rehabilitation of existing housing, within the city.	Up to 10 points
8. The project provides deeply affordable housing for households earning less than 50% of the median family income.	Up to 10 points
9. The project provides extremely affordable housing for households earning less than 30% of the median family income. Projects could include permanent supportive housing and/or transitional housing for families or individuals who are houseless.	Up to 5 points
10. Project concepts and designs showing close proximity to schools, parks, commercial areas, public transportation, services and jobs, and demonstration of cost-effective sustainability and energy-efficiency measures.	Up to 10 points
11. The project maximizes partnerships in the community (volunteers, in-kind contributions, cash contributions, multiple organization involved, etc.) and demonstrates alliance building that directly benefits community members in need, such as helping build household wealth.	Up to 5 points
12. The project utilizes already existing resources in effective and innovative ways. The project shall not duplicate services provided by another organization.	Up to 10 points
13. The agency submitting the proposal has the capacity to carry out the project and has had demonstrated successes completing projects of similar scope. Higher points to projects that demonstrate engagement and contracting with D/M/W/ESB/SDVBE businesses in the last 10+ years.	Up to 10 points
14. The budget and timeline are thorough and realistic (evidence of construction and/ or service costs required with application).	Up to 10 points
Total Potential Points	70

***FOR 2023, the Median Family Income for the City of Newberg was \$114, 400.**

DEFINITIONS:

“D/M/W/ESB/SDVBE” means a business that is Disadvantaged, Minority-Owned, Women-Owned, Emerging Small Businesses, and/or Service Disabled Veterans Business Enterprises.

“Gross Income” (GI) is income before taxes for all members of one family in the previous twelve months. Income can be derived from salaries, investments, self-employment, farming, and other sources. Assets such as a house or a farm are not income. For people who have wages, gross income means the figure that they would have received in their paychecks if there were no taxes. Gross income before taxes when applied to farm income means the figure that results when farm expenses are subtracted from farm sales. Gross income also includes unemployment and disability compensation, worker's compensation and severance pay; and welfare assistance payments.

“Family” means all persons living in the same household who are related by birth, marriage or adoption.

“Median Family Income” (MFI) includes the income of the householder and all other individuals 15 years old and over in the household, whether they are related to the householder or not. Because many households consist of only one person, average household income is usually less than average family income. Although the household income statistics cover the past 12 months, the characteristics of individuals and the composition of households refer to the time of application. Thus, the income of the household does not include amounts received by individuals who were members of the household during all or part of the past 12 months if these individuals no longer resided in the household at the time of application. Similarly, income amounts reported by individuals who did not reside in the household during the past 12 months but who were members of the household at the time of application are included. However, the composition of most households was the same during the past 12 months as at the time of application, as defined by the U.S. Census.

Attachment A – Additional Evidence

1. The project is considered an eligible use or activity under Section 3, and benefits households earning less than 80% of the median family income for a period of at least 60 years following the date of construction (threshold verification)*.

Newberg Area Habitat for Humanity (NAHFH) partners with households that earn between 25 and 60 percent of their area median income (AMI). Currently, all three homebuyers partnered with NAHFH for homeownership earn below 50 percent AMI. All NAHFH homes are built using shared equity model of homeownership to ensure permanent affordability. Our land lease ensures an affordability period of 99 years. See the attached document titled “NAHFH Ground Lease Template.”

2. The project is ready for implementation with documentation to demonstrate financial feasibility.

This project is currently in plan review with the City of Newberg. Once approval is received in April 2025, we will immediately begin the process of procuring bids for site work.

See document titled, “NAHFH Audits” for NAHFH’s two most recent audits. Please also see document titled, “NAHFH 990” for evidence of NAHFH’s strong financial feasibility.

3. If the project includes the acquisition of property, the identified property is currently available for acquisition and the applicant has secured either a purchase option or letter of interest from the seller. If the applicant is also applying for federal funding, review procurement requirements and limitations before obtaining a purchase option.

NAHFH owns the property – see “NAHFH Evidence of Site Control” document for evidence. NAHFH is not utilizing federal funding to support this project.

4. That relocation of existing residents will be minimized, and when necessary, the applicant has included accurate relocation assistance costs as part of the project pro forma.

The property is currently vacant – no relocation was necessary.

5. The proposal demonstrates that the Construction Excise Tax (CET) Funds are the most appropriate funding source for the project. Provide a description of a financing gap that includes funding sources or demonstrates budget constraints that limit the ability to pay or finance projects.

A 2024 Oregon Housing and Community Services’ Local Innovation and Fast Track (LIFT) Homeownership award supported land acquisition, pre-development, site work and administrative costs. This project has a financing gap of about \$350,000 for home construction. This project gives the City of Newberg the opportunity to support construction costs for two affordable homes. Without support from the City’s CET Fund, our construction timeline will be delayed while NAHFH seeks alternative funding sources. See the attached budget for evidence of our financing gap.

7. The project provides new affordable housing, or new affordability, through retention or rehabilitation of existing housing, within the city.

This project will build one two-unit stacked duplex to be sold at an affordable price to two first-time, low-income home buyers. NAHFH sells homes using a shared equity ownership model to ensure permanent affordability. The property is in a prime location in Newberg, located less than a quarter of a mile from Newberg's bustling downtown E 1st St, near many amenities and resources.

8. The project provides deeply affordable housing for households earning less than 50% of the median family income.

NAHFH partners with households that earn between 25 and 60 percent of their area median income (AMI). Currently, all three homeowners partnered with NAHFH for homeownership earn below 50 percent AMI. Homebuyers for the two homes this project will build have not yet been selected but will likely earn less than 50 percent AMI.

9. The project provides extremely affordable housing for households earning less than 30% of the median family income. Projects could include permanent supportive housing and/or transitional housing for families or individuals who are houseless.

The lowest AMI NAHFH serves is 25 percent; most households partnered with NAHFH earn between 30 and 50 percent AMI.

10. Project concepts and designs showing close proximity to schools, parks, commercial areas, public transportation, services and jobs, and demonstration of cost-effective sustainability and energy-efficiency measures.

The project site, 1201 E 5th Street in Newberg, is within one mile of commercial services, Chehalem Community Center, Chehalem Cultural Center, grocery stores (Grocery Outlet and Nap's Thriftway), medical clinics (Providence ExpressCare and others), Walgreens Pharmacy, multiple bus stations, parks (Memorial Park and others), and Edwards Elementary School. Within two miles of the project site is Providence Newberg Medical Center, multiple social services, Chehalem Aquatic and Fitness Center, and Newberg High School. The proximity of the project site to Newberg's city center and resources makes the site ideal for new affordable housing.

NAHFH is a sustainable builder. By using recycled materials and building to certification standards greater than the Oregon building code, NAHFH contributes to the sustainability of the City. NAHFH builds durable homes that result in long-term savings for the homeowner. NAHFH homes are built using high quality materials and energy-efficient designs that exceed industry standards with the aim of reducing waste and increasing efficiency. Construction efficiency is maintained by selecting materials with low embodied energy, such as recycled and locally produced materials, that reduces cost as well as Habitat's carbon footprint. NAHFH also utilizes materials, fixtures, and appliances donated to the restore to increase our sustainability and keep costs low. The site will also feature a rainwater retention system and rain garden. Water will flow to one area to support natural

vegetation. We will plant two new trees for shading and will utilize xeriscaping around the homes.

11. The project maximizes partnerships in the community (volunteers, in-kind contributions, cash contributions, multiple organization involved, etc.) and demonstrates alliance building that directly benefits community members in need, such as helping build household wealth.

NAHFH utilizes volunteers in all of our programs to build community as we build homes. NAHFH utilizes volunteers on the construction site, in planning, and for events that benefit the project. NAHFH's Volunteer Program has a reputation of being a safe place for local communities of color and connects community members for a shared cause: advancing affordable homeownership.

NAHFH partners with homebuyers for about one year prior to the home sale. Through their time of partnership, homebuyers help build their homes alongside NAHFH staff and volunteers, and participate in homebuyer and financial education courses. The education aspect of our program helps to create sustainable homeownership. NAHFH partners with the Housing Authority of Yamhill County to provide HUD-Certified financial counseling and first-time homebuyer education. Once homebuyers are selected into a Habitat program, each local Habitat affiliate partners with regional homeownership centers to provide access to at least eight hours of HUD-certified financial counseling and eight hours of HUD-certified first-time homebuyer education. Our homeownership educational services are offered in both English and Spanish off-site at culturally specific churches, non-profits, and schools. All NAHFH materials, including outreach materials, program application forms, in-person translation services, and program contracts, are available in English, Spanish, and any other language upon request - at no cost.

Other organizations and companies that support NAHFH's homeownership program include the following:

- Hampton Plumbing – local plumbing company (provides labor discount)
- On Electric – local electric company
- Ken Bowers/Bowers Concrete (located in Dayton; provides discounts)
- DeMoss and GutterMan – (provides donated materials)
- Parr Lumber (provides discounts)
- Reed Rental
- Sherwin Williams (provides discounts)
- JB Insulation (provides discounts)
- Schneider Electric (provides donated materials)

NAHFH is an independent nonprofit organization that is part of the Habitat for Humanity network. There are 24 independent Habitat for Humanity affiliates in the Oregon network, with 20 serving rural communities. Habitat affiliates regularly share best practices and resources with the cumulative goal of increasing affordable housing availability for

underserved populations. Over the decades of affordable home development in Oregon, financing the development, streamlining the development process, and replicating designs has increased efficiency. NAHFH also relies on Habitat for Humanity of Oregon for additional funding that supports homebuyers, including Individual Development Accounts and down payment assistance.

12. The project utilizes already existing resources in effective and innovative ways. The project shall not duplicate services provided by another organization.

NAHFH uses items donated to the NAHFH ReStore, our resale store that accepts donations of home goods, building materials, and appliances for homes. The NAHFH homeownership model is unique in Newberg—NAHFH is the only affordable homeownership developer that incorporates extensive partnerships with homebuyers to create lasting homeownership and that sources most of the construction labor through a network of local volunteers.

NAHFH is part of the Habitat for Humanity network—no affiliate service areas overlap with another.

13. The agency submitting the proposal has the capacity to carry out the project and has had demonstrated successes completing projects of similar scope. Higher points to projects that demonstrate engagement and contracting with D/M/W/ESB/SDVBE businesses in the last 10+ years.

NAHFH has served Newberg and surrounding communities as a reliable affordable homeownership developer since 1994. In our 30+ years of service, NAHFH has built, rehabilitated, or recycled 30 homes, and currently has 13 under construction or predevelopment in Newberg and Dundee. The project CET funds would support is similar in scope to recently completed NAHFH projects.

NAHFH utilizes COBID-certified and MWESB businesses for our home repair and homeownership programs. To identify potential MWESB contractors and business partners, NAHFH staff search the State's COBID-certified contractor listings. NAHFH also sends its homeownership program marketing materials and monthly newsletter to culturally-responsive partners including CASA of Oregon, Unidos Bridging Community, and Latinx Comercio. Additionally, NAHFH Executive Director is female. Recent MWESB partners include our appraisal company, Hess Appraisals, and DeMoss & GutterMan LLC, both woman-owned. We expect to maintain and expand these partnerships.

14. The budget and timeline are thorough and realistic (evidence of construction and/or service costs required with application).

This project is currently in plan review with the City of Newberg. Once approval is received in April 2025, we will immediately begin the process of procuring bids for site work. When the site work contractor is determined, we will begin excavation work in May/June 2025. Foundations should be poured in July/August 2025 followed by vertical construction beginning August 2025. Construction is expected to last up to one year and should be completed by August 2026.

1201 E. 5th Street Budget

Category	Description or Source	Newberg Area HFH		Total
		Cash	In Kind	
Expenses				
Personnel, Administrative	Staff, Bookkeeping, Volunteer Coordination	\$ 75,000	\$ -	\$ 75,000
Project Administration	Bond/Insurance, General Conditions, Legal, Marketing/Advertising	\$ 6,000	\$ -	\$ 6,000
Personnel	Habitat volunteer labor	\$ -	\$ 125,000	\$ 125,000
Land	1201 E 5th St, Newberg	\$ 225,000	\$ 75,000	\$ 300,000
Construction - Soft Costs				
	Architecture/Engineering	\$ 15,000	\$ 8,000	\$ 23,000
	Appraisals, Environmental	\$ 8,900	\$ 400	\$ 9,300
	Geotechnical, Special inspections, Survey	\$ 11,000	\$ 1,500	\$ 12,500
	Soft Costs Contingency (5%)	\$ 2,240	\$ -	\$ 2,240
	Subtotal	\$ 37,140	\$ 9,900	\$ 47,040
Construction - Permits/SDC		\$ 79,000	\$ 30,000	\$ 109,000
Construction - Hard Costs				
	Demolition of existing structures	\$ 23,000	\$ -	\$ 23,000
	Site Work	\$ 90,000	\$ -	\$ 90,000
	Utilities	\$ 22,500	\$ -	\$ 22,500
	Right of Way Improvements - 5th & Meridian	\$ 10,000	\$ -	\$ 10,000
	Building	\$ 194,000	\$ 40,000	\$ 234,000
	Subtotal	\$ 339,500	\$ 40,000	\$ 379,500
	Hard Costs Contingency (5%)	\$ 18,975	\$ -	\$ 18,975
	Total	\$ 358,475	\$ 40,000	\$ 398,475
Total Construction		\$ -	\$ -	
		\$ 474,615	\$ 79,900	\$ 554,515
		\$ -		
Total Expenses		\$ 780,615	\$ 279,900	\$ 1,060,515
Revenue				
		\$ -		
Oregon Housing & Community Services LIFT Funding		\$ 400,000		\$ 400,000
In-Kind Donations			\$ 154,900	\$ 154,900
Volunteer Hours			\$ 125,000	\$ 125,000
Grant Amount Requested	City of Newberg CET Fund	\$ 380,615		\$ 380,615
Total Revenue		\$ 780,615	\$ 279,900	\$ 1,060,515

2500 hrs per unit,
\$25/hr, 2 units

EXTENDED TO MAY 15, 2025

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Form **990**Department of the Treasury
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public.

Go to www.irs.gov/Form990 for instructions and the latest information.**2023**Open to Public
Inspection**A** For the **2023** calendar year, or tax year beginning **JUL 1, 2023** and ending **JUN 30, 2024**

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization NEWBERG AREA HABITAT FOR HUMANITY		D Employer identification number 93-1141508	
	Doing business as			
	Number and street (or P.O. box if mail is not delivered to street address)		Room/suite	E Telephone number
	PO BOX 118			(503) 537-9938
	City or town, state or province, country, and ZIP or foreign postal code NEWBERG, OR 97132		G Gross receipts \$ 959,464.	
F Name and address of principal officer: SHANNON SELAH SAME AS C ABOVE		H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions H(c) Group exemption number 8545		
I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527				
J Website: WWW.NEWBERGHABITAT.ORG				
K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other			L Year of formation: 1994	M State of legal domicile: OR

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: SEE SCHEDULE O		
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3 Number of voting members of the governing body (Part VI, line 1a)	3	10
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	10
	5 Total number of individuals employed in calendar year 2023 (Part V, line 2a)	5	9
	6 Total number of volunteers (estimate if necessary)	6	114
	7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
7b Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.	
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
		581,708.	554,849.
	9 Program service revenue (Part VIII, line 2g)	33,412.	131,142.
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	984.	325.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	1,681.	2,588.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	617,785.	688,904.
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.	0.
	14 Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	195,010.	238,252.
	16a Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b Total fundraising expenses (Part IX, column (D), line 25)	17,137.	
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	111,604.	113,153.
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	306,614.	351,405.
	19 Revenue less expenses. Subtract line 18 from line 12	311,171.	337,499.
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	Beginning of Current Year	End of Year
		3,803,407.	4,830,267.
	21 Total liabilities (Part X, line 26)	247,905.	937,266.
22 Net assets or fund balances. Subtract line 21 from line 20	3,555,502.	3,893,001.	

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer		Date	
	SHANNON SELAH, EXECUTIVE DIRECTOR			
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check if self-employed <input type="checkbox"/> PTIN
	NATHAN STAMETS	NATHAN STAMETS		P01931251
Preparer Use Only	Firm's name	Firm's EIN		
	HOFFMAN, STEWART & SCHMIDT, PC	93-0743240		
Preparer Use Only	Firm's address	Phone no.		
	3 CENTERPOINTE DRIVE, SUITE 300 LAKE OSWEGO, OR 97035-8663	503-220-5900		

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

Part III Statement of Program Service AccomplishmentsCheck if Schedule O contains a response or note to any line in this Part III ☒ **X****1** Briefly describe the organization's mission:

SEE SCHEDULE O

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.**4a** (Code:) (Expenses \$ 96,448. including grants of \$) (Revenue \$ 133,733.)

FAMILIES IN NEED OF A DECENT PLACE TO LIVE BUILD SAFE AND AFFORDABLE HOMES IN PARTNERSHIP WITH US. HABITAT HOUSES ARE MODESTLY SIZED. THEY ARE LARGE ENOUGH FOR THE HOMEOWNER FAMILY'S NEEDS, BUT SMALL ENOUGH TO KEEP CONSTRUCTION AND MAINTENANCE COSTS AFFORDABLE. BY USING THE LABOR OF VOLUNTEERS AND PROSPECTIVE HOMEOWNERS, EMPLOYING EFFICIENT BUILDING METHODS, KEEPING HOUSE SIZES MODEST, USING DONATED CONSTRUCTION MATERIALS AND APPLIANCES, AND ISSUING NOPROFIT LOANS, HABITAT MAKES ITS HOUSES AFFORDABLE FOR LOW-INCOME FAMILIES TO PURCHASE. AFFORDABLE HOMEOWNERSHIP HELPS CREATE THE CONDITIONS THAT FREE FAMILIES FROM INSTABILITY, STRESS AND FEAR AND ENCOURAGE SELF-RELIANCE AND CONFIDENCE. (SEE CONTINUATION ON SCHEDULE O).

4b (Code:) (Expenses \$ 153,761. including grants of \$) (Revenue \$)

HABITAT FOR HUMANITY'S RESTORE ACCEPTS DONATED GOODS AND BUILDING MATERIALS FOR RESALE TO THE PUBLIC, PROVIDING AN ENVIRONMENTALLY AND SOCIALLY RESPONSIBLE WAY TO KEEP MATERIALS OUT OF THE WASTE STREAM WHILE PROVIDING FUNDING FOR HABITAT'S COMMUNITY IMPROVEMENT WORK.

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)**4d** Other program services (Describe on Schedule O.)

(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses 250,209.

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? See instructions	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	X	
b Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>		X
c Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>		X
d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>	X	
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>		X
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I. See instructions</i>		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>		X

Part IV Checklist of Required Schedules (continued)

	Yes	No
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>	22	X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>	23	X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>	24a	X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b	
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c	
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d	
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>	25a	X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>	25b	X
26 Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i>	26	X
27 Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i>	27	X
28 Was the organization a party to a business transaction with one of the following parties? (See the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i>	28a	X
b A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i>	28b	X
c A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i>	28c	X
29 Did the organization receive more than \$25,000 in noncash contributions? <i>If "Yes," complete Schedule M</i>	29	X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>	30	X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>	31	X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>	32	X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>	33	X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i>	34	X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a	X
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>	35b	
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>	36	X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>	37	X
38 Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? Note: All Form 990 filers are required to complete Schedule O	38	X

Part V Statements Regarding Other IRS Filings and Tax ComplianceCheck if Schedule O contains a response or note to any line in this Part V ☐

	Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	1a	1
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b	0
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	X

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

		Yes	No
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a 9		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b	X	
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a		X
b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O	3b		
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a		X
b If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).			
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a		X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		X
c If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c		
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a		X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b		
7 Organizations that may receive deductible contributions under section 170(c).			
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a		X
b If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b		
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c		X
d If "Yes," indicate the number of Forms 8282 filed during the year	7d		
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e		X
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f		X
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g		
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h		
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8		
9 Sponsoring organizations maintaining donor advised funds.			
a Did the sponsoring organization make any taxable distributions under section 4966?	9a		
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b		
10 Section 501(c)(7) organizations. Enter:			
a Initiation fees and capital contributions included on Part VIII, line 12	10a		
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b		
11 Section 501(c)(12) organizations. Enter:			
a Gross income from members or shareholders	11a		
b Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b		
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a		
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b		
13 Section 501(c)(29) qualified nonprofit health insurance issuers.			
a Is the organization licensed to issue qualified health plans in more than one state? Note: See the instructions for additional information the organization must report on Schedule O.	13a		
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b		
c Enter the amount of reserves on hand	13c		
14a Did the organization receive any payments for indoor tanning services during the tax year?	14a		X
b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O	14b		
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see the instructions and file Form 4720, Schedule N.	15		X
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	16		X
17 Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? If "Yes," complete Form 6069.	17		

Part VI Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI ☒

Section A. Governing Body and Management

	1a	1b	Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.	10			
b Enter the number of voting members included on line 1a, above, who are independent		10		
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?			2	X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?			3	X
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?			4	X
5 Did the organization become aware during the year of a significant diversion of the organization's assets?			5	X
6 Did the organization have members or stockholders?			6	X
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?			7a	X
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?			7b	X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:				
a The governing body?			8a	X
b Each committee with authority to act on behalf of the governing body?			8b	X
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O			9	X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
10a Did the organization have local chapters, branches, or affiliates?	10a	X
b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	
11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X
b Describe on Schedule O the process, if any, used by the organization to review this Form 990.		
12a Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	X
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X
c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done	12c	X
13 Did the organization have a written whistleblower policy?	13	X
14 Did the organization have a written document retention and destruction policy?	14	X
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a The organization's CEO, Executive Director, or top management official	15a	X
b Other officers or key employees of the organization	15b	X
If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	X
b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed OR

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
☐ Own website ☐ Another's website ☒ Upon request ☐ Other (explain on Schedule O)

19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records
 SHANNON SELAH - (503) 537-9938
 PO BOX 118, NEWBERG, OR 97132

Part VIII Statement of RevenueCheck if Schedule O contains a response or note to any line in this Part VIII ☐

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c					
	d Related organizations	1d					
	e Government grants (contributions)	1e					
	f All other contributions, gifts, grants, and similar amounts not included above ...	1f	554,849.				
	g Noncash contributions included in lines 1a-1f	1g	\$ 279,586.				
	h Total. Add lines 1a-1f		554,849.				
Program Service Revenue	2 a AMORTIZATION	Business Code	531390	131,142.	131,142.		
	b						
	c						
	d						
	e						
	f All other program service revenue						
	g Total. Add lines 2a-2f		131,142.				
	Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			325.		
4 Income from investment of tax-exempt bond proceeds							
5 Royalties							
6 a Gross rents		6a	(i) Real (ii) Personal				
b Less: rental expenses ...		6b					
c Rental income or (loss)		6c					
d Net rental income or (loss)							
7 a Gross amount from sales of assets other than inventory		7a	(i) Securities (ii) Other				
b Less: cost or other basis and sales expenses		7b					
c Gain or (loss)		7c					
d Net gain or (loss)							
8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18		8a					
b Less: direct expenses		8b					
c Net income or (loss) from fundraising events							
9 a Gross income from gaming activities. See Part IV, line 19		9a					
b Less: direct expenses		9b					
c Net income or (loss) from gaming activities							
10 a Gross sales of inventory, less returns and allowances	10a		270,557.				
b Less: cost of goods sold	10b		270,560.				
c Net income or (loss) from sales of inventory			-3.			-3.	
Miscellaneous Revenue	11 a OTHER	Business Code	900099	2,591.	2,591.		
	b						
	c						
	d All other revenue						
	e Total. Add lines 11a-11d			2,591.			
	12 Total revenue. See instructions			688,904.	133,733.	0.	322.

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 ...				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	63,125.	48,105.	4,481.	10,539.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	148,920.	100,636.	48,284.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits				
10 Payroll taxes	26,207.	18,383.	6,521.	1,303.
11 Fees for services (nonemployees):				
a Management				
b Legal				
c Accounting				
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	16,635.	1,789.	14,846.	
12 Advertising and promotion				
13 Office expenses	64,048.	58,239.	514.	5,295.
14 Information technology				
15 Royalties				
16 Occupancy	13,804.	12,648.	1,156.	
17 Travel	2,576.	2,576.		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials ...				
19 Conferences, conventions, and meetings				
20 Interest	18,000.	9,914.	8,086.	
21 Payments to affiliates	11,072.	11,072.		
22 Depreciation, depletion, and amortization	25,408.	25,408.		
23 Insurance	25,311.	25,311.		
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a CAPITALIZED EXPENSES	-67,398.	-67,398.		
b _____				
c _____				
d _____				
e All other expenses _____	3,697.	3,526.	171.	
25 Total functional expenses. Add lines 1 through 24e	351,405.	250,209.	84,059.	17,137.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

Part X Balance SheetCheck if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	255,206.	1	387,695.
	2 Savings and temporary cash investments		2	
	3 Pledges and grants receivable, net	154,683.	3	63,484.
	4 Accounts receivable, net		4	789.
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net	1,739,475.	7	1,769,011.
	8 Inventories for sale or use	22,883.	8	28,559.
	9 Prepaid expenses and deferred charges	10,948.	9	10,094.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 1,211,033.		
	b Less: accumulated depreciation	10b 203,973.	1,032,467.	10c 1,007,060.
	11 Investments - publicly traded securities		11	
	12 Investments - other securities. See Part IV, line 11		12	
	13 Investments - program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	587,745.	15	1,563,575.
16 Total assets. Add lines 1 through 15 (must equal line 33)	3,803,407.	16	4,830,267.	
Liabilities	17 Accounts payable and accrued expenses	68,892.	17	50,762.
	18 Grants payable		18	
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23 Secured mortgages and notes payable to unrelated third parties	179,013.	23	886,504.
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D		25	
	26 Total liabilities. Add lines 17 through 25	247,905.	26	937,266.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/>			
	and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	3,546,502.	27	3,824,801.
	28 Net assets with donor restrictions	9,000.	28	68,200.
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/>			
	and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
32 Total net assets or fund balances	3,555,502.	32	3,893,001.	
33 Total liabilities and net assets/fund balances	3,803,407.	33	4,830,267.	

Form **990** (2023)

Part XI Reconciliation of Net AssetsCheck if Schedule O contains a response or note to any line in this Part XI ☐

1	Total revenue (must equal Part VIII, column (A), line 12)	1	688,904.
2	Total expenses (must equal Part IX, column (A), line 25)	2	351,405.
3	Revenue less expenses. Subtract line 2 from line 1	3	337,499.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	3,555,502.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	3,893,001.

Part XII Financial Statements and ReportingCheck if Schedule O contains a response or note to any line in this Part XII ☐

	Yes	No
1 Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
b Were the organization's financial statements audited by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	X	
c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? _____ If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.	X	
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F? _____		X
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits _____		

Form **990** (2023)

Department of the Treasury
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
Attach to Form 990 or Form 990-EZ.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

Name of the organization

NEWBERG AREA HABITAT FOR HUMANITY

Employer identification number	
--------------------------------	--

93-1141508

Part I	Reason for Public Charity Status. (All organizations must complete this part.) See instructions.
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The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____

10 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)

11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**

12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.

a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**

b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**

c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**

d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**

e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations _____

g Provide the following information about the supported organization(s). _____

g Provide the following information about the supported organization(s).						
(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	384,556.	328,598.	355,307.	581,708.	554,849.	2,205,018.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	384,556.	328,598.	355,307.	581,708.	554,849.	2,205,018.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4.						2,205,018.

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
7 Amounts from line 4	384,556.	328,598.	355,307.	581,708.	554,849.	2,205,018.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources				984.	325.	1,309.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						2,206,327.
12 Gross receipts from related activities, etc. (see instructions)					12	2,473,832.
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2023 (line 6, column (f), divided by line 11, column (f))	14	99.94 %
15 Public support percentage from 2022 Schedule A, Part II, line 14	15	99.95 %
16a 33 1/3% support test - 2023. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		
		<input checked="" type="checkbox"/>
b 33 1/3% support test - 2022. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		
		<input type="checkbox"/>
17a 10% -facts-and-circumstances test - 2023. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization		
		<input type="checkbox"/>
b 10% -facts-and-circumstances test - 2022. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization		
		<input type="checkbox"/>
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions		
		<input type="checkbox"/>

Schedule A (Form 990) 2023

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2023 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2022 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2023 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2022 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2023. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

b 33 1/3% support tests - 2022. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
11a		
b A family member of a person described on line 11a above?		
11b		
c A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI .		
11c		

Section B. Type I Supporting Organizations

	Yes	No
1 Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
1		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		
2		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		
1		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
1		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).		
2		
3 By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.		
3		

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
a	<input type="checkbox"/>	The organization satisfied the Activities Test. Complete line 2 below.
b	<input type="checkbox"/>	The organization is the parent of each of its supported organizations. Complete line 3 below.
c	<input type="checkbox"/>	The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).
2 Activities Test. Answer lines 2a and 2b below.		
a		Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.
2a		
b		Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.
2b		
3 Parent of Supported Organizations. Answer lines 3a and 3b below.		
a		Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No" provide details in Part VI .
3a		
b		Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.
3b		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). See instructions.
All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (<i>explain in detail in Part VI</i>):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required - <i>provide details in Part VI</i>)	5
6	Other distributions (<i>describe in Part VI</i>). See instructions.	6
7	Total annual distributions. Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (<i>provide details in Part VI</i>). See instructions.	8
9	Distributable amount for 2023 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2023	(iii) Distributable Amount for 2023
1 Distributable amount for 2023 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2023 (reasonable cause required - <i>explain in Part VI</i>). See instructions.			
3 Excess distributions carryover, if any, to 2023			
a From 2018			
b From 2019			
c From 2020			
d From 2021			
e From 2022			
f Total of lines 3a through 3e			
g Applied to underdistributions of prior years			
h Applied to 2023 distributable amount			
i Carryover from 2018 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2023 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2023 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2023, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
6 Remaining underdistributions for 2023. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
7 Excess distributions carryover to 2024. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2019			
b Excess from 2020			
c Excess from 2021			
d Excess from 2022			
e Excess from 2023			

Part VI

Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.
(See instructions.)

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

Complete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public
Inspection

Name of the organization

NEWBERG AREA HABITAT FOR HUMANITY

Employer identification number

93-1141508

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (for example, recreation or education)	<input type="checkbox"/> Preservation of a historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included on line 2a	2c
d Number of conservation easements included on line 2c acquired after July 25, 2006, and not on a historic structure listed in the National Register	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year

4 Number of states where property subject to conservation easement is located

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?

☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year

8 Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?

☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items.

(i) Revenue included on Form 990, Part VIII, line 1

(ii) Assets included in Form 990, Part X

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1

b Assets included in Form 990, Part X

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply).

a ☐ Public exhibition

d ☐ Loan or exchange program

b ☐ Scholarly research

e ☐ Other _____

c ☐ Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets

to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

Part IV Escrow and Custodial Arrangements Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
c Beginning balance	1c
d Additions during the year	1d
e Distributions during the year	1e
f Ending balance	1f

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII ☐

Part V Endowment Funds Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment _____ %

b Permanent endowment _____ %

c Term endowment _____ %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

(i) Unrelated organizations? ☐ Yes ☐ No

(ii) Related organizations? ☐ Yes ☐ No

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? ☐ Yes ☐ No

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		191,740.		191,740.
b Buildings		941,307.	153,386.	787,921.
c Leasehold improvements				
d Equipment		54,873.	27,474.	27,399.
e Other		23,113.	23,113.	0.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B))				1,007,060.

Part VII Investments - Other Securities

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, line 12, col. (B))		

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (b) must equal Form 990, Part X, line 13, col. (B))		

Part IX Other Assets

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) LAND LEASED TO HOMEOWNERS	118,000.
(2) CONSTRUCTION IN PROGRESS	1,445,575.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 15, col. (B))	1,563,575.

Part X Other Liabilities

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

(a) Description of liability	(b) Book value
1. (1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 25, col. (B))	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ... ☒

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements	1	959,464.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	270,560.
e	Add lines 2a through 2d	2e	270,560.
3	Subtract line 2e from line 1	3	688,904.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)	5	688,904.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements	1	621,965.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	270,560.
e	Add lines 2a through 2d	2e	270,560.
3	Subtract line 2e from line 1	3	351,405.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)	5	351,405.

Part XIII Supplemental Information

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

PART X, LINE 2:

MANAGEMENT BELIEVES THE ORGANIZATION DOES NOT HAVE ANY UNCERTAIN TAX

POSITIONS.

PART XI, LINE 2D - OTHER ADJUSTMENTS:

COST OF GOODS SOLD - RESALE STORE 270,560.

PART XII, LINE 2D - OTHER ADJUSTMENTS:

COST OF GOODS SOLD - RESALE STORE 270,560.

[illegible]

**SCHEDULE M
(Form 990)**

Department of the Treasury
Internal Revenue Service

Noncash Contributions

Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.
Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public
Inspection

Name of the organization

NEWBERG AREA HABITAT FOR HUMANITY

Employer identification number

93-1141508

Part I Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art - Works of art				
2 Art - Historical treasures				
3 Art - Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities - Publicly traded				
10 Securities - Closely held stock				
11 Securities - Partnership, LLC, or trust interests				
12 Securities - Miscellaneous				
13 Qualified conservation contribution - Historic structures				
14 Qualified conservation contribution - Other ...				
15 Real estate - Residential				
16 Real estate - Commercial				
17 Real estate - Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other (<u>RESALE STORES</u>)	X	0	276,085.	FMV
26 Other (<u>MATERIALS</u>)	X	1	3,501.	FMV
27 Other ()				
28 Other ()				

29 Number of Forms 8283 received by the organization during the tax year for contributions
for which the organization completed Form 8283, Part V, Donee Acknowledgement

29

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it
must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for
exempt purposes for the entire holding period?

b If "Yes," describe the arrangement in Part II.

31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash
contributions?

b If "Yes," describe in Part II.

33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked,
describe in Part II.

	Yes	No
30a		X
31		X
32a		X
33		

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule M (Form 990) 2023

Part II

Supplemental Information. Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.
Attach to Form 990 or Form 990-EZ.
Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

Name of the organization	NEWBERG AREA HABITAT FOR HUMANITY	Employer identification number	93-1141508
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FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

SEEKING TO PUT GOD'S LOVE INTO ACTION, HABITAT FOR HUMANITY BRINGS PEOPLE TOGETHER TO BUILD HOMES, COMMUNITIES, AND HOPE.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

SEEKING TO PUT GOD'S LOVE INTO ACTION, HABITAT FOR HUMANITY BRINGS PEOPLE TOGETHER TO BUILD HOMES, COMMUNITIES AND HOPE TO REALIZE OUR VISION OF A WORLD WHERE EVERYONE HAS A DECENT PLACE TO LIVE. NEWBERG AREA HABITAT FOR HUMANITY ADHERES TO A STRICT NON-PROSELYTIZING POLICY AND WILL NOT BASE AN OFFER OF ASSISTANCE ON THE EXPRESSED OR IMPLIED CONDITION THAT PEOPLE ADHERE TO OR CONVERT TO A PARTICULAR FAITH OR LISTEN AND RESPOND TO MESSAGING DESIGNED TO INDUCE CONVERSION TO A PARTICULAR FAITH.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:

STUDIES SHOW THAT STRONG AND STABLE HOUSEHOLDS ARE FOUNDATIONAL TO CHILD DEVELOPMENT AND GROWTH. WHEN A HOME FOSTERS INSTEAD OF HINDERS HEALTH AND SAFETY, FAMILIES CAN FLOURISH. OWNING AN AFFORDABLE HOME ALSO ALLOWS HOMEOWNERS TO LIFT UP THEIR ENTIRE FAMILY BY SAVING FOR THEIR FUTURES AND INVESTING IN EDUCATIONAL OPPORTUNITIES, BOLSTERING JOB OPPORTUNITIES AND LONG-TERM CAREER GROWTH. DURING FISCAL YEAR 2024, NEWBERG AREA HABITAT FOR HUMANITY HAD TWO HOMES IN THE CONSTRUCTION PHASE AND FIVE HOMES IN THE PREDEVELOPMENT PHASE.

FORM 990, PART VI, SECTION B, LINE 11B:

THE FORM 990 IS REVIEWED BY THE EXECUTIVE DIRECTOR, THEN A COPY IS PROVIDED

Name of the organization

NEWBERG AREA HABITAT FOR HUMANITY

Employer identification number

93-1141508

TO BOARD MEMBERS PRIOR TO FILING.

FORM 990, PART VI, SECTION B, LINE 12C:

OFFICERS AND BOARD MEMBERS ARE REQUIRED TO DISCLOSE ANY POSSIBLE CONFLICTS
OF INTEREST ANNUALLY.

FORM 990, PART VI, SECTION B, LINE 15:

COMPENSATION IS BASED ON COMPARABLE MARKET DATA FOR SIMILAR POSITIONS IN
THE SURROUNDING AREAS AND IS REVIEWED AND APPROVED BY THE BOARD OF
DIRECTORS.

FORM 990, PART VI, SECTION C, LINE 19:

GOVERNING DOCUMENTS AND FINANCIAL STATEMENTS ARE AVAILABLE UPON REQUEST.

After recording, return to:
Charlie Harris
19400 NE Jaquith Rd.
Newberg, OR 97132

Until a change is requested,
All Tax Statements will be sent to:
Newberg Habitat for Humanity
PO Box 118
Newberg, OR 97132

Yamhill County Official Records **202310901**
DMR-CONDMR
Stn=3 SUTTONS **12/04/2023 12:37:01 PM**
2Pgs \$10.00 \$11.00 \$5.00 \$60.00 **\$86.00**

I, Keri Hinton, County Clerk for Yamhill County, Oregon, certify that
the instrument identified herein was recorded in the Clerk records.

Keri Hinton - County Clerk

MEMORANDUM OF CONTRACT OF SALE

This Memorandum of Contract of Sale (this "Memorandum") is made as of 9/13, 2023, between **Charlie Harris and Elaine Harris**, as tenants by the entirety ("Seller") whose address is 19400 NE Jaquith Rd., Newberg, OR 97132, and **Newberg Area Habitat for Humanity**, an Oregon nonprofit corporation ("Purchaser") whose address is PO Box 118, Newberg, OR 97132.

Pursuant to a Land Sale Contract dated this same date ("Contract"), Seller sold to Purchaser Seller's interest in that certain property in Yamhill County, Oregon, more particularly described as:

All of the south half of lots 9 and 10, Block 21, Edwards Addition, in the City of Newberg, County of Yamhill, State of Oregon
subject to the following encumbrances:

- (1) Deed from Jesse Edwards to William Stratton and wife, recorded March 26, 1891, Recording Number Book 24, Page 600, restricting the sale or use of intoxicating liquor;
- (2) An easement on the east side of the south half of Lot 10, recorded October 18, 2019 as Document 201915149 in the Yamhill County Official Records.
- (3) Occupancy by a month-to-month tenancy, subject to a 90 day eviction notice set to expire on November 6, 2023. The 90-day notice is based on purchaser's expressed intent to demolish the existing house on the property.
- (4) The exceptions noted in the Preliminary Title Report (PTR) dated August 18, 2023, except for the Deed Of Trust noted in exception 11 of the PTR, which will be satisfied at Closing.

The terms upon which Seller has sold the Property to Purchaser are set forth in the Contract, to which reference is made for all purposes. The true and actual consideration for this conveyance is \$225,000. Purchaser will pay such amount, with interest, according to the terms of the Contract, under which the final payment of principal and interest is due on October 15, 2026.

BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON TRANSFERRING FEE TITLE SHOULD INQUIRE ABOUT THE PERSON'S RIGHTS, IF ANY, UNDER ORS 195.300, ORS 195.301 AND ORS 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010. THIS INSTRUMENT DOES NOT ALLOW USE OF THE PROPERTY DESCRIBED IN THIS INSTRUMENT IN VIOLATION OF APPLICABLE LAND USE LAWS AND REGULATIONS. BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON ACQUIRING FEE TITLE TO THE PROPERTY SHOULD CHECK WITH THE APPROPRIATE CITY OR COUNTY PLANNING DEPARTMENT TO VERIFY THAT THE UNIT OF LAND BEING TRANSFERRED IS A LAWFULLY ESTABLISHED LOT OR PARCEL, AS DEFINED IN ORS 92.010 OR ORS 215.010, TO VERIFY THE APPROVED USES OF THE LOT OR PARCEL, TO DETERMINE ANY LIMITS ON LAWSUITS AGAINST FARMING OR FOREST PRACTICES, AS DEFINED IN ORS 30.930, AND TO INQUIRE ABOUT THE RIGHTS OF NEIGHBORING PROPERTY OWNERS, IF ANY, UNDER ORS 195.300, ORS 195.301 AND ORS 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010.

Property Tax Account No.59135

This Memorandum will not be deemed or construed to define, limit, or modify the Contract, or any provision thereof, in any manner.

Page 1 Memorandum of Land Sale Contract between Charlie and Elaine Harris (Sellers) & Newberg Area Habitat for Humanity (Purchaser)

FIRST AMERICAN TITLE 40915800

IN WITNESS WHEREOF, the parties have caused this Memorandum to be executed as of the day and year first above written.

Seller:

Charlie Harris
Elaine Harris

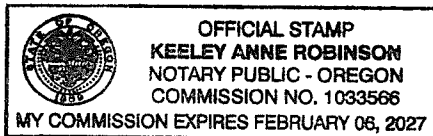
Purchaser:

SL Shh

ACKNOWLEDGMENTS

STATE OF OREGON)
County of Yamhill)ss.

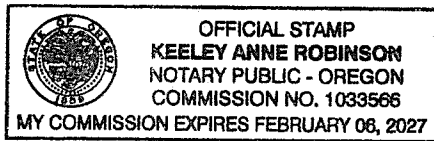
This record was acknowledged before me on 9/13, 2023, by Charlie Harris .and Elaine Harris



STATE OF OREGON)
County of Yamhill)ss.

/s/ Keeley Robinson
Notary Public for Oregon
My commission expires: 2-6-27

This record was acknowledged before me on 9/13, 2023, by Shannon as
executive of Newberg Area Habitat for Humanity. Seah
director



/s/ Keeley Robinson
Notary Public for Oregon
My commission expires: 2-6-27

WHEN RECORDED, PLEASE MAIL TO:

Newberg Area Habitat for Humanity
PO Box 118
Newberg, OR 97132

SEND PROPERTY TAX NOTICES TO:

Newberg Area Habitat for Humanity
PO Box 118
Newberg, OR 97132

SHORT FORM LAND LEASE
Incorporating Affordable Housing Covenants
(Pursuant to ORS §§93.780 - 93.802 and 456.270 - 456.295)

On this _____ day of _____, 2021, **Newberg Area Habitat for Humanity**, an Oregon nonprofit corporation, whose address is PO Box 118, Newberg, Oregon 97132 and **Charlotte Polly Tremaine** (“**Homeowner**”), whose street address is the real estate described below, enter into this Short Form Land Lease.

MASTER FORM LAND LEASE INCORPORATED BY REFERENCE

This Short Form Land Lease incorporates by this reference all provisions of the Master Form Land Lease which Newberg Area Habitat for Humanity recorded in Yamhill County on March 2, 2021 as Fee Number 202104232 pursuant to ORS §§ 93.780 – 93.802 and 456.270 – 456.295.

Homeowner acknowledges that a copy of the Master Form Land Lease was furnished to her at or before the time she executed this Short Form Land Lease.

Homeowner agrees with Newberg Area Habitat for Humanity that upon execution and recording of this Short Form Land Lease, provisions of the Master Form Land Lease shall apply to the real estate transaction documented by this Short Form Land Lease as though the provisions of the Master Form Land Lease were fully set forth in this Short Form Land Lease.

SECTION 1. REAL ESTATE AFFECTED BY THIS REAL ESTATE TRANSACTION

Newberg Area Habitat for Humanity leases to Homeowner the Land legally described in the attached Exhibit A: LAND LEGALLY DEFINED, incorporated by this reference.

On the same day as this Short Form Land Lease is recorded, Homeowner will acquire fee title to the “Home,” which is the dwelling unit and all other improvements on the Land. The Home has a street address of 1205 E 5th Street, Newberg, OR 97132.

The property tax account for the Land is **R3220BC 03601**.

The property tax account for the Home is to be determined by the Yamhill County Assessor.

3.1 This Lease shall begin on the first date written above and has a 99 year term with one option to renew for an additional 99 years.

10.7 Information for Formula Price Calculations:

b) Initial Appraised Market Value of Land and Home: \$320,000.

Market Sales Price:	__\$320,000__
Minus Newberg Area Habitat for Humanity grant funds and subsidy:	- \$86,150__
Minus Seller paid closing costs:	- ____
TOTAL: Homeowner's Base Price for the Home:	= _\$233,850__

14.2 Homeowner's address for notices, if not the street address for the Home, is _____. If no information is written in the blank, then Homeowner has agreed to use street address of the Home for notices.

SECTION 3. DEVIATIONS FROM MASTER FORM LAND LEASE

This Short Form Land Lease **deviates from the Master Form Land Lease in that it does not include the provisions of** (i) Exhibit C, and (ii) the Community Land Trust Lease Rider For OHCS Single-Family Residential Mortgage Revenue Bond Loan (“OHCS Rider”). The provisions of Exhibit C and the OHCS Rider do not apply in this real estate transaction.

SECTION 4. LIST OF EXHIBITS

1. Exhibit A: LEASED LAND LEGALLY DEFINED
2. Exhibit B: HOMEOWNER'S LETTER OF AGREEMENT

IN WITNESS WHEREOF, the parties have executed this Short Form Land Lease as amended and supplemented by the Community Land Trust Ground Lease Rider for Fannie Mae/USDA (Fannie Mae Form 2100 3/06 (rev. 12/10) and the Rider to Habitat Land Lease for Benefit of the State of Oregon, Oregon Housing and Community Services on the day and year first above written.

Newberg Area Habitat for Humanity

an Oregon nonprofit corporation,
Lessor

HOMEOWNER:

STATE OF OREGON

COUNTY OF _____

This instrument was acknowledged before me on _____, 20_____, by _____ as _____ of Newberg Area Habitat for Humanity, an Oregon nonprofit corporation, on behalf of the corporation.

Notary Public – State of Oregon

My commission expires: _____

Exhibit A: LAND AND HOME LEGALLY DEFINED

The Land is the land only, exclusive of any improvements situated on the land, described as follows:

A PORTION OF THAT TRACT OF LAND DESCRIBED IN INSTRUMENT NO. 202003197, YAMHILL COUNTY DEED RECORDS, ALSO BEING A PORTION OF LOT 12, BLOCK 21 OF THE PLAT OF "EDWARD'S ADDITION TO THE TOWN OF NEWBERG", YAMHILL COUNTY RECORDS, LOCATED IN THE NORTHWEST ONE-QUARTER OF SECTION 20, TOWNSHIP 3 SOUTH, RANGE 2 WEST, WILLAMETTE MERIDIAN, CITY OF NEWBERG, YAMHILL COUNTY, OREGON, BEING MORE PARTICULARLY DESCRIBED AS FOLLOWS:

BEGINNING AT A POINT ON THE SOUTH LINE OF BLOCK 21 OF THE PLAT OF "EDWARD'S ADDITION TO THE TOWN OF NEWBERG" AND BEARS SOUTH 89°49'49" WEST, 24.72 FEET FROM THE SOUTHEAST CORNER OF LOT 12 OF SAID BLOCK; THENCE LEAVING SAID SOUTH LINE OF BLOCK 21 NORTH 00°23'14" WEST, 72.00 FEET TO THE NORTH LINE OF THAT TRACT OF LAND DESCRIBED IN INSTRUMENT NO. 202003197; THENCE ALONG SAID NORTH LINE NORTH 89°49'41" EAST, 24.99 FEET TO THE NORTHEAST CORNER OF SAID TRACT; THENCE ALONG THE EASTERLY LINE OF SAID TRACT SOUTH 00°10'19" EAST, 72.00 FEET TO AFOREMENTIONED SOUTHEAST CORNER OF LOT 12; THENCE ALONG SAID SOUTH LINE OF AFOREMENTIONED BLOCK 21 SOUTH 89°49'49" WEST, 24.72 FEET TO THE **POINT OF BEGINNING**.

Exhibit B: HOMEOWNER'S LETTER OF AGREEMENT

To: **Newberg Area Habitat for Humanity**

From: **Charlotte Tremaine**

Date: _____

This letter is given to Newberg Area Habitat for Humanity to become an exhibit to a Lease between Newberg Area Habitat for Humanity and me. I will be leasing a parcel of land from Newberg Area Habitat for Humanity and will be buying the home that sits on that parcel of land. I will therefore become what is described in the Lease as "the Homeowner."

My legal counsel, _____, has explained to me the terms and conditions of the Lease and other legal documents that are part of this transaction. I understand the way these terms and conditions will affect my rights as a Newberg Area Habitat for Humanity homeowner, now and in the future.

I have discussed these terms and conditions with _____ (who are my heirs) for the purposes of increasing their understanding and acceptance of the terms and conditions of the Lease and other legal documents that are part of this transaction.

I understand that the following documents describe the special nature of the purchase of my home:

- a) this Letter of Agreement;
- b) the Master Form Land Lease recorded in the same county where the Home and Land are located;
- c) this Short Form Land Lease creating Client's leasehold interest in the Land, including its Exhibits;
- d) Warranty Deed.

In particular I understand and agree with the following points:

One of the goals of Newberg Area Habitat for Humanity is to keep Newberg Area Habitat for Humanity homes affordable for lower income households from one Newberg Area Habitat for Humanity homeowner to the next. I support this goal as a Newberg Area Habitat for Humanity homeowner.

The terms and conditions of my Lease will keep my home affordable for future "income-qualified persons" (as defined in the Lease). If and when I want to sell my home, the lease requires that I sell it to another income-qualified person. I understand it is not the practice of Newberg Area Habitat for Humanity to purchase the Home directly from me, but the lease allows Newberg Area Habitat for Humanity to do so. The terms and conditions of the lease also limit the price for which I can sell the home, called the "Purchase Option Price," in order to keep it affordable for such income-qualified persons.

The Purchase Option Price is generally calculated by the lesser of the appraised value of my Home or my base price plus/minus 25% of any appreciation/depreciation since I purchased my home plus any Newberg Area Habitat for Humanity approved Qualified Capital Improvements I made. _____ [Initial Here].

When I sell my Home and interest in the Land, if the market value of my Home and interest in the Land (that is the value of my Home without the restrictions of the Lease) is lower than the Formula Price, then I must sell at the lower market value. When I sell my Home and interest in the Land, if the market value of my Home and interest in the Land (without restrictions) is greater than the Formula Price, I must sell for no more than the Formula Price.

It is also a goal of Newberg Area Habitat for Humanity to promote resident ownership of Newberg Area Habitat for Humanity homes. For this reason, my Lease requires that, if I and my family move out of our home permanently, we must sell it. We cannot continue to own it as absentee owners.

As a Newberg Area Habitat for Humanity homeowner, it is my desire to see the terms of the Lease and related documents honored. I consider these terms fair to me and others.

Sincerely,

HOMEOWNER

Printed Name:

STATE OF OREGON

COUNTY OF _____

This instrument was acknowledged before me on _____, 20_____, by

Charlotte Tremaine.

Notary Public – State of Oregon

My commission expires: _____

Notary Public – State of Oregon

**COMMUNITY LAND TRUST GROUND LEASE RIDER FOR FANNIE MAE AND US
DEPARTMENT OF AGRICULTURE LOANS (FANNIE MAE FORM 2100 3/06 (REV. 12/10))**

EXHIBIT Community Land Trust Ground Lease Rider

THIS COMMUNITY LAND TRUST GROUND LEASE RIDER (the "Rider") is made this _____ day of _____, 2021 and amends and supplements a certain ground lease (referred to herein as "the CLT Ground Lease") dated _____ that is by and between Newberg Area Habitat for Humanity as lessor (herein referred to as "the Lessor" but may otherwise be referred to in the Land Lease as "Newberg Area Habitat for Humanity") and Charlotte Tremaine, as lessee (herein referred to as "the Lessee" but may otherwise be referred to in the Land Lease as "Homeowner"). This Rider shall be deemed incorporated into the CLT Ground Lease, and the CLT Ground Lease as amended by this Rider, shall hereafter be referred to as the "Lease," unless otherwise indicated.

The CLT Ground Lease shall mean the HABITAT AFFILIATE Master Ground Lease, as recorded on _____ under the Yamhill County Auditor's recording number _____, and as supplemented and amended by that certain Short Form Land Lease executed by the Lessor and Lessee contemporaneously with this rider.

The CLT Ground Lease is a long-term lease of the Lessor's fee interest in the land located at 1209 E 5th Street, Newberg, Oregon, referred to herein as the "Leased Land," as improved by a residential structure or unit, referred to herein as the "Improvements." The Leased Land and the Improvements are collectively referred to herein as the "Leased Premises."

This Rider amends the CLT Ground Lease for the purpose of enabling the Lessee to obtain Fannie Mae or US Department of Agriculture financing in the form of a mortgage or deed of trust given this _____ day of _____, by Lessee to _____ (the "Specified Mortgage"), and the interest of the Specified Mortgagee in the Leased Premises as secured by such mortgage or deed of trust may be referred to herein as the "Leasehold Estate." The Specified Mortgage is recognized by Lessor as a "Permitted Mortgage" (or as such concept is otherwise defined) under the CLT Ground Lease, and the holder of the Specified Mortgage (the "Specified Mortgagee") is recognized as a "Permitted Mortgagee" (or as such concept is otherwise defined) under the CLT Ground Lease.

ADDITIONAL COVENANTS. Notwithstanding anything to the contrary contained in the CLT Ground Lease, and in addition to the covenants and agreements made in the CLT Ground Lease, the Lessor and the Lessee further covenant and agree, so long (but only so long) as the Specified Mortgagee, its successors and assigns shall have an interest in the Leased Premises, as a holder of the Specified Mortgage or as an owner of the Lessee's interest pursuant to any sale after or in lieu of foreclosure, the following provisions shall apply to the CLT Ground Lease as modifications thereof:

A. No Assignment or Transfer. The making of the Specified Mortgage shall not be deemed to constitute an assignment or transfer of the Lease or Leasehold Estate so as to require the Specified Mortgagee to assume the performance of any of the Lessee's obligations under the Lease.

B. Status of the Fee Estate. The Lessor represents and warrants that there is no existing mortgage on the fee estate, and so long as the Specified Mortgage shall remain on the Leased Premises, the Lessor and the Lessee shall not subordinate the Lease to any mortgage or lien that may hereafter be placed on the fee estate. Notwithstanding the foregoing, a state- or local-government entity ("Government Entity") may hold a prior recorded interest (represented by recorded covenants, a mortgage or deed of trust, other lien) on the fee

Page 7 of 17 – Short Form Land Lease of Newberg Area Habitat for Humanity with CLT Land Lease Rider and OHCS LIFT Rider

estate if the Government Entity has agreed that in the event it (including its successors and assigns) succeeds to the interest of the Lessor under the Lease by any remedy available to the Government Entity by law or pursuant to its lien, the Government Entity shall recognize all the terms of the Lease and this Rider as though the Government Entity were acting as the Lessor. Such recognition must include, but is not limited to, the provisions of this Rider whereby all provisions of the Lease regarding (a) occupancy of the Leased Premises as a primary residence by the Lessee, (b) limitation on assignment of, or sublease under, the Lease, (c) the price at which the Leasehold Estate may be transferred, and (d) the income of successive transferees, assignees or successors, shall, in the event of foreclosure or assignment in lieu of foreclosure of the Specified Mortgage, be of no further force or effect with respect to such Specified Mortgagee or its successive transferees, assignees or successors. Further, in such event of the Government Entity succeeding to the interests of the Lessor, the Lessee hereby agrees to recognize the Government Entity as exercising all rights and privileges of the Government Entity as lessor under the Lease and this Rider.

Such agreement by the Government Entity may be evidenced by the agreement between the Government Entity and the Lessor under which the Government Entity's prior recorded interest is derived, or by use of a recognition agreement derived from a sample the Specified Mortgagee may obtain from Fannie Mae or UD Department of Agriculture. Irrespective of any interest by a Government Entity, the Specified Mortgage shall constitute a first leasehold lien on the Leased Premises, and shall have priority over the Lessor's reversionary interest. If the Lessor conveys title to the Leased Land while the Specified Mortgage remains on the Leased Premises, the Lease shall remain in effect with the same priority thereto.

C. Termination, Forfeiture and Modification of Lease. There shall be no termination, forfeiture, or modification of the Lease, except as provided in this Rider, without the prior written consent of the Specified Mortgagee. The Lessor and Lessee shall amend the Lease from time to time as reasonably requested by the Specified Mortgagee, as long as the requested changes do not change the periodic fee, charge or payment due the Lessor for the rights accorded the Lessee under the Lease (the "Ground Lease Fee"), and do not materially or adversely affect the rights of Lessor or Lessee or their respective interests in the Leased Premises. An adjustment of the Ground Lease Fee may be made by the Lessor as provided in the Lease, without prior approval of the Specified Mortgagee, so long as written notice has been delivered to the Specified Mortgagee at least 60 days prior to the effective date of such adjustment with respect to adjustments other than those (i) that were scheduled at the time the Specified Mortgage was given, and (ii) reflecting routine, periodic updates to variable expenses such as property taxes and liability insurance premiums; provided, however, that the Specified Mortgagee shall have the right to arbitrate (as provided herein) any dispute as to an adjustment of the Ground Lease Fee.

D. New Lease. In the event the Lessee's interest in the Lease has been terminated, forfeited, or surrendered as provided in the Lease, and the Specified Mortgage remains outstanding, a new Lease shall automatically be created between the Lessor and the Specified Mortgagee, which Lease shall be for the remainder of the term of the Lease, with the same priority thereto, and shall be subject to the same terms of the Lease as would be applicable pursuant to Section E.1. below where the Specified Mortgagee had accelerated its note, foreclosed on the Specified Mortgage, taken an assignment in lieu of foreclosure, or exercised its other remedies for default.

E. Mortgage Default or Foreclosure. Subject to the following, upon the occurrence of an event of default under the Specified Mortgage (as determined by the Specified Mortgagee—an "Event of Default"), and without the consent of the Lessor, the Specified Mortgagee shall be permitted to accelerate its note, foreclose on the Specified Mortgage, take an assignment in lieu of foreclosure, or exercise its other remedies for default.

Further:

1. Upon the occurrence of an Event of Default under the Specified Mortgage, the Lessee shall immediately notify the Lessor of such Event of Default and shall submit to Lessor copies of all notices the Lessee received from the Specified Mortgagee relating thereto. The Specified Mortgagee and the Lessor shall endeavor to communicate and cooperate in efforts to deal with the circumstances of the Event of Default and the actions the parties may take relating thereto; provided, however, the Specified Mortgagee shall have no obligation to give formal legal notice of the Event of Default to the Lessor.

2. The Lessee and the Specified Mortgagee agree that the Lessor shall have the right, but not the obligation, to cure an Event of Default in the Lessee's name and on the Lessee's behalf. If such cure is not effective and continuing, nothing herein shall be construed to prevent or delay the Specified Mortgagee from its pursuit of foreclosure and any other available remedies. The Lessee shall be responsible to the Lessor for all payments made, and expenses incurred, by the Lessor in curing such default.

3. Should the Lessor not choose to cure an Event of Default as specified above, the Lessor shall nevertheless have the option to purchase from the Specified Mortgagee its interest in the Leasehold Estate on the Leased Premises for the full amount owing to the Specified Mortgagee under the Specified Mortgage as of the date of closing of the purchase, upon written notice given by the Specified Mortgagee (the "Mortgagee Option Notice") not later than 60 days following acquisition of title to the Leasehold Estate by the Specified Mortgagee by foreclosure or by an assignment in lieu of foreclosure; provided, however, the Specified Mortgagee may give such written notice following the occurrence of an Event of Default under the Specified Mortgage and prior to the completion of foreclosure proceedings. If the Lessor elects to exercise such option to purchase, the Lessor shall give written notice to the Specified Mortgagee of the Lessor's intent to purchase the Leasehold Estate (the "Lessor Option Notice") within 45 days following the Specified Mortgagee's giving of the Mortgagee Option Notice; provided, however, at the option of the Lessor, in the event the Mortgagee Option Notice is given prior to the completion of foreclosure proceedings by the Specified Mortgagee, the Lessor shall, within such 45-day period, be able to give a written notice to the Specified Mortgagee that it will delay giving the Lessor Option Notice until a date that is not later than 30 days following written notice from the Specified Mortgagee of its acquisition of title to its interest in the Leasehold Estate on the Leased Premises.

The Lessor shall complete the purchase of the Specified Mortgagee's interest in the Leasehold Estate within 60 days of giving the Lessor Option Notice. If the Lessor does not complete the purchase within the allotted 60 days, the Specified Mortgagee shall be free to sell its interest to another person or entity. Further, if the Lessor does not complete the purchase within the allotted 60 days, the Lessor agrees to pay to the Specified Mortgagee its costs of holding its interest in the Leasehold Estate from the date of the Lessor Option Notice until the expiration of such 60-day period. If the Lessor does not purchase the Specified Mortgagee's interest in the Leasehold Estate as described herein, the Leasehold Estate may be transferred, mortgaged and sublet an unlimited number of times, and the Lessor shall not require a credit review or impose other qualifying criteria on any such transferee, mortgagee or sublessee.

4. In the event of foreclosure or assignment in lieu of foreclosure, which results in the conveyance of the Leasehold Estate on the Leased Premises from the Lessee, any adjustment of the Ground Lease Fee to reflect then current fair market rental value as provided in the Lease, shall be subject to the approval of the Specified Mortgagee. The Specified Mortgagee and the Lessor shall attempt to resolve any dispute concerning such adjustment of the Ground Lease Fee, through the normal interaction of the parties, or through formal mediation as the case may warrant. If the dispute remains unresolved, the Specified Mortgagee and the Lessor shall submit the dispute as to the fair market rental value to binding arbitration.

5. In the event the Specified Mortgagee acquires title to the Leasehold Estate on the Leased Premises through foreclosure or assignment in lieu of foreclosure of the Specified Mortgage, all provisions of the Lease

regarding (a) occupancy of the Leased Premises as a primary residence by the Lessee, (b) any limitation on the assignment of, or sublease under, the Lease, (c) any obligation to target certain populations in marketing the Leasehold Estate to potential transferees, (d) the price at which the Leasehold Estate on the Leased Premises may be transferred, and (e) the income of successive transferees, and their successors and assigns, shall be of no further force or effect with respect to such Specified Mortgagee or its successive transferees, assignees or successors. The foregoing sentence shall not be construed to invalidate other Lease provisions regarding permitted use of the Leased Premises. Any transfer or assignment of the Leasehold Estate encumbered by the Specified Mortgage as provided for in this paragraph shall be deemed a permitted sale, transfer or assignment of the Lease and the Leasehold Estate. Further, in such event, the Leasehold Estate may be transferred, mortgaged and sublet an unlimited number of times, and the Lessor shall not require a credit review or impose other qualifying criteria on any such transferee, mortgagee or sublessee.

F. Lease Default. There shall be no forfeiture or termination of the Lease except for (i) the nonpayment of amounts due under the Lease, and (ii) violation of one or more provisions of the Lease addressing the following: (a) prohibition or restrictions on the sale or transfer of the Lessee's interest (however, non-sale transfers resulting from marriage, divorce, death of a spouse, or a transfer otherwise permitted by applicable federal law, may not constitute a basis for default under the Lease, though the Lessor may require such transferee to agree to assume the transferor's obligations under the Lease), and (b) requirement that the Lessee occupy the Leased Premises as primary residence. Provided, however, such forfeiture or termination shall be subject to the Specified Mortgagee's right to cure a monetary default, or otherwise foreclose or take an assignment of the Leasehold Estate in lieu of foreclosure with respect to the Lessee's monetary or non-monetary default. Notwithstanding the foregoing, nothing herein shall be construed to require the Specified Mortgagee to cure any non-monetary default. Further, the Specified Mortgagee shall become subrogated to any and all rights of the Lessee with respect to such curing of a default. If the Lessee's default shall be cured as provided in the Lease, and the Specified Mortgagee shall discontinue its foreclosure or assignment in lieu of foreclosure proceedings, the Lease shall continue in full force and effect as if the Lessee had not defaulted. A default by the Lessee under the Lease shall constitute a default under the Specified Mortgage.

G. Lease Default Notice. Notwithstanding the notice requirements provided in the Lease, no default notice by the Lessor shall be deemed to have been given unless and until a copy thereof shall have been so given to the Specified Mortgagee.

H. Insurance. All insurance policies covering the Improvements shall by endorsement name the Specified Mortgagee as an additional insured and loss payee, and provide the Specified Mortgagee with 30 days' cancellation notice.

I. Casualty and Condemnation. If the Leased Premises are destroyed or taken to such an extent that the Lease is to be terminated, the insurance proceeds or condemnation award, as the case may be, shall be applied first in an amount sufficient to satisfy the Specified Mortgage. Upon the termination of the Lease as a result of a partial destruction or a condemnation of less than the entire Leased Premises, the total insurance proceeds or condemnation award, as the case may be, shall be paid to an appointed trustee, who shall first apply such insurance proceeds or condemnation award in accordance with the Specified Mortgage for restoration of the Improvements (if such trustee determines that the Improvements may reasonably be restored to a residential use consistent with the Lease), with the balance of such insurance proceeds or condemnation award to be allocated between the Lessor and Lessee as otherwise provided in the Lease. The Specified Mortgagee shall be entitled to participate in (i) the adjustment of all casualty losses and (ii) all condemnation proceedings and settlement discussions. Any insurance proceeds or condemnation award shall be applied in accordance with the Specified Mortgage. The Specified Mortgagee shall also be entitled to participate in the adjustment of the Ground Lease Fee as a result of a partial destruction or taking.

J. Force Majeure. The Lessee shall not be in default where performance is delayed or prevented by "Acts of God," war, civil commotion, strikes, labor disputes or the like.

K. Easements and Alterations. Additions to and alternations in the Improvements may be made as provided in the Lease, as long as the value of the Leased Premises is not diminished. The Lessor, as owner of the fee interest in the Leased Land, shall join in all easements, permits and applications necessary for such development of the Leased Premises as is permitted under the Lease, provided that the Lessor shall have no liability or obligation under such easement, permit or application.

L. Arbitration. The Specified Mortgagee shall have the right to participate in any arbitration or legal proceedings between the Lessor and the Lessee. Any arbitration proceedings shall be conducted in accordance with arbitration statutes applicable in the state where the Leased Premises are located.

M. Merger. If the estates of the Lessor and Lessee are at any time owned by the same person, so long as the Specified Mortgagee has any interest in the security or in the Specified Mortgage, such person shall take all necessary steps to ensure that the Specified Mortgage constitutes a first lien on the combined estate.

N. Sublease. There shall be no modification, cancellation, or surrender of any subleases, or prepayment of rent thereunder without the consent of the Specified Mortgagee. If the Specified Mortgagee forecloses on the Leased Premises, or takes an assignment in lieu of foreclosure, all subtenants shall attorn to such Specified Mortgagee or its assignee.

O. Estoppel Certificate. The Lessor shall, from time to time, with 10 days written notice from the Specified Mortgagee, certify by written instrument, duly executed and acknowledged, to such Specified Mortgagee that the Lease has not been amended, the Lease is in full force and effect, that neither party is in default thereunder, and shall certify as to the existence of any offsets, counterclaims or defenses on the part of the Lessee.

P. Conflict. In the event of a conflict between the terms and provisions of this Rider and the terms and provisions of the Lease, the terms and provisions of this Rider shall control.

BY SIGNING BELOW, the Lessor and the Lessee accept and agree to the terms and conditions of this Rider.

IN WITNESS WHEREOF, the parties have executed this Rider at _____, on the day and year first written above.

LESSOR:

corporation

LESSEE:

_____, _____
Newberg Area Habitat for Humanity, an Oregon nonprofit

STATE OF OREGON
COUNTY OF _____

On _____, before me, the undersigned Notary Public in and for said state, personally appeared _____, _____ of Newberg Area Habitat for Humanity, known to me to be the persons who executed the within instrument and acknowledged to me that they executed the same on behalf of Newberg Area Habitat for Humanity for the purposes therein stated.

Notary Public for Oregon

My commission expires _____

STATE OF OREGON
COUNTY OF _____

On _____, before me, the undersigned Notary Public in and for said state, personally appeared _____, as LESSEE, known to me to be the persons who executed the within instrument and acknowledged to me that he/she/they executed the same for the purposes therein stated.

Notary Public for Oregon

My commission expires _____

**RIDER TO HABITAT LAND LEASE FOR BENEFIT OF STATE OF OREGON, OREGON
HOUSING AND COMMUNITY SERVICES (“LIFT”)**

**Habitat
LIFT Affordability Subsidiary Lease Rider
For
OHCS LIFT Program**

This Rider is for Homes receiving LIFT funding from OHCS to make the Homes more affordable and shall govern over any inconsistent terms in the Habitat for Humanity Land Lease (“Land Lease”) to which this Rider is attached.

This LIFT AFFORDABILITY SUBSIDIARY RIDER (the “Rider”) is made this _____ day of _____, _____, and amends and supplements that certain Land Lease dated _____, 20_____, that is by and between as lessor (hereinafter referred to as “Lessor” but may otherwise be referred to in the Land Lease as “Habitat”) and Charlotte Tremaine as lessee (hereinafter referred to as “Lessee” but may otherwise be referred to in the Land Lease as “Homeowner”). This Rider shall be deemed incorporated into the Land Lease and the Land Lease, as amended by this Rider, shall be referred to as the “Land Lease,” unless otherwise indicated.

The Land Lease is a long-term lease of Lessor’s fee interest in the land located at 1209 E 5th Street, Newberg, Oregon referred to herein as the “Leased Land” or “Land” as improved by a residential structure or unit, referred to as “Improvements” or the “Home.”

This Rider amends the Land Lease for the purpose of Lessor’s ability to receive funds through OHCS’ LIFT program to help subsidize the cost of the Land and improvements to the Land, exclusive of a housing structure (“Subsidy”) and thereby reduce the cost of the Home to the Homeowner.

The parties to this Rider agree that the criteria and requirements are applicable to any funding through the LIFT program, and shall govern over any inconsistent terms in the Land Lease, unless otherwise stated in this Rider.

1. Affordability Period. The affordability period shall be a minimum of twenty (20) years or the length of Article XI-Q Bond issued by the State of Oregon (“Bond”) based on the original maturity date identified at the time of the Bond sale, whichever is greater. To the extent the affordability period contained in the Land Lease is greater, then the provisions of the Land Lease as to the affordability period shall govern.

2. Eligible Homeowners. LIFT funding must be made available to Homeowners earning at or below 80% of the median household income for the applicable Standard Metropolitan Statistical Area or County as calculated and adjusted for household size from time to time by the U.S. Department of Housing and Urban Development (“HUD”) or any successor.

3. OHCS’ Security Interest in the Land. The parties to this Rider each acknowledge that OHCS has a deed of trust lien on the Land and in Habitat’s leasehold interest as Lessor under the Land Lease.

4. Restrictive Covenants. The parties to the Rider each acknowledge that the Land Lease includes affordability covenants and other covenants and conditions relating to transfer restrictions and maintenance standards under the Land Lease. The parties to this Rider acknowledge and agree that OHCS shall have the right, as a third party beneficiary, to enforce the affordability covenants and the other covenants and conditions relating to transfer restrictions and maintenance standards under the Land Lease.

5. Compliance and Oversight. The parties to this Rider agree that OHCS will undertake certain ongoing oversight monitoring with respect to OHCS’s rights under this Rider which may include but not limited to:

- (a) Initial household income verification at the time of Home purchase.
- (b) For any Home’s subsequent sales during the Affordability Period, verification of the purchasing Homeowner’s income.

(c) Annual notification of Homeowner's being in arrears in the payment of property taxes, insurance and other obligations relating to the Land and Home.

(d) Verification of appropriate maintenance and repair of the Land and Home as required by the Land Lease.

The Homeowner agrees to cooperate with Habitat and OHCS in providing any information and documentation related to the above when requested in writing by Habitat and/or OHCS. The Homeowner shall provide such information and documentation not less than twenty (20) days after receipt of the request therefor.

IN WITNESS Whereof, the parties have executed this Rider on the date first written above.

LESSOR:

NEWBERG AREA HABITAT FOR HUMANITY, an
Oregon nonprofit corporation

By: _____

Name: _____

Its: _____

LESSEE:

STATE OF OREGON

COUNTY OF _____

On _____, before me, the undersigned Notary Public in and for said state, personally appeared _____, _____ of Newberg Area Habitat for Humanity, known to me to be the persons who executed the within instrument and acknowledged to me that they executed the same on behalf of Newberg Area Habitat for Humanity for the purposes therein stated.

Notary Public for Oregon

My commission expires _____

LESSEE:

Charlotte Tremaine

STATE OF OREGON

COUNTY OF _____

On _____, before me, the undersigned Notary Public in and for said state, personally appeared and **Charolotte Tremaine**, as LESSEE, known to me to be the persons who executed the within instrument and acknowledged to me that he/she/they executed the same for the purposes therein stated.

Notary Public for Oregon

My commission expires _____

EXHIBIT B
SPARK Newberg Application



Newberg Construction Excise Tax (CET) Funding Request Application

NOTE: The second round of applications are due April 1, 2025 at 4:30 p.m.

Applications are to be submitted to Leanne Wagener, Assistant Planner by email at leanne.wagener@newbergoregon.gov or by postal mail via City of Newberg, PO Box 970, Newberg, Oregon, 97132 or by hand delivery to City Hall, 414 E First Street.

CONTACT INFORMATION:

Project Name:	SPARK Newberg		
Organization Name:	SPARK Newberg	<input type="checkbox"/> For-profit	<input checked="" type="checkbox"/> Non-profit
Contact Name/Title:	Todd Hall		
Mailing Address:	PO Box 1060, Newberg	State/Zip:	OR 97132
Phone:	503-998-1341	Email:	tandkhill@comcast.net

PROJECT INFORMATION:

Total project cost:	\$7.2M		
Requested amount of CET funding:	\$1M		
Has this project requested or will request funds from the Affordable Housing Trust Fund?	<input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes	Amount requested: _____
Amount and description of other matching funds being contributed to the project, if applicable: _____			
Has this organization received Newberg CET funds in the past?	<input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes	Amount received: _____

Project Partners and their Contributions to the Project:	Austin Industries - \$31,807.50 (in-kind)
	Love INC, SEDCOR, Missing Middle Housing Fund - not monetary at this time.

Estimated project beginning date:	09/2025	Completion date:	12/2027
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COMMUNITY DEVELOPMENT
PLANNING DIVISION
(503) 537-1240
planning@newbergoregon.gov

Please briefly describe the affordable housing problem this project is trying to solve and how it helps in solving that challenge:

The problem: A shortage of affordable housing. A worker living in our community must be gainfully employed and doing many things correctly in order to afford basic rent/lease payments while living in a median-value dwelling, if such a dwelling can be found locally. For those aspiring to take the next step and own a home, the barriers are significant when faced with inflated mortgage rates and historically high home values. SPARK Newberg seeks to address perhaps the most difficult barrier; accumulating enough money for a down payment. **Proposed solution:** SPARK Newberg will acquire property, construct 20 dwelling units in two phases (initially, 10 units followed by 10 additional units in phase two), and provide educational curriculum for program participants. Applicants will be screened to ensure they meet the CET stated income parameters (80% or less of AMI) and other standards. Successful applicants will commit to a 48-month program developed and overseen by SPARK Newberg that will include financial education, life skills, employment training, and community involvement. Local educational partners will include Love INC and Willamette Workforce Partners. Scheduled validation points and accountability will be required. Each participant will also commit to a monthly financial contribution equal to a market-competitive rent/lease payment. In exchange, the participant will be granted the use of a SPARK Newberg-owned dwelling. Upon the successful completion of the 48-month program, the participant will apply for a grant equal to half of their cumulative financial contributions. This grant may be used toward a down payment on a home. SPARK Newberg will use half of participant financial contributions plus funds raised independently to perpetuate the program. As a participant completes the program, applications for a new participant will be accepted.

Please attach additional information that describes how this project will address the Competitive Awards Selection Criteria described in “Attachment A” of this form, including additional documentation/evidence as needed.

☒ Information that addresses Competative Selection Criteria, attached (please select)

Briefly describe what is attached:

- Program Overview
- Response to Competitive Selection Criteria
- Budget
- Letters of Support from:
Nathan Wilfire, Missing Middle Housing fund, Abisha Stone, SEDCOR, Dr. Robin Baker, George Fox University, and Scott Parrish, A-dec.

ATTACHMENT A

Construction Excise Tax (CET) Fund FY 2024-2025 Competitive Selection Criteria

Minimum Threshold Criteria	Potential Points
1. The project is considered an eligible use or activity under Section 3, and benefits households earning less than 80% of the median family income for a period of at least 60 years following the date of construction (threshold verification)*.	NA
2. The project is ready for implementation with documentation to demonstrate financial feasibility.	NA
3. If the project includes the acquisition of property, the identified property is currently available for acquisition and the applicant has secured either a purchase option or letter of interest from the seller. If the applicant is also applying for federal funding, review procurement requirements and limitations before obtaining a purchase option.	NA
4. That relocation of existing residents will be minimized, and when necessary, the applicant has included accurate relocation assistance costs as part of the project pro forma.	NA
5. The proposal demonstrates that the Construction Excise Tax (CET) Funds are the most appropriate funding source for the project. Provide a description of a financing gap that includes funding sources or demonstrates budget constraints that limit the ability to pay or finance projects.	NA
Scored Application Criteria	
7. The project provides new affordable housing, or new affordability, through retention or rehabilitation of existing housing, within the city.	Up to 10 points
8. The project provides deeply affordable housing for households earning less than 50% of the median family income.	Up to 10 points
9. The project provides extremely affordable housing for households earning less than 30% of the median family income. Projects could include permanent supportive housing and/or transitional housing for families or individuals who are houseless.	Up to 5 points
10. Project concepts and designs showing close proximity to schools, parks, commercial areas, public transportation, services and jobs, and demonstration of cost-effective sustainability and energy-efficiency measures.	Up to 10 points
11. The project maximizes partnerships in the community (volunteers, in-kind contributions, cash contributions, multiple organization involved, etc.) and demonstrates alliance building that directly benefits community members in need, such as helping build household wealth.	Up to 5 points
12. The project utilizes already existing resources in effective and innovative ways. The project shall not duplicate services provided by another organization.	Up to 10 points
13. The agency submitting the proposal has the capacity to carry out the project and has had demonstrated successes completing projects of similar scope. Higher points to projects that demonstrate engagement and contracting with D/M/W/ESB/SDVBE businesses in the last 10+ years.	Up to 10 points
14. The budget and timeline are thorough and realistic (evidence of construction and/ or service costs required with application).	Up to 10 points
Total Potential Points	70

***FOR 2023, the Median Family Income for the City of Newberg was \$114, 400.**

DEFINITIONS:

“D/M/W/ESB/SDVBE” means a business that is Disadvantaged, Minority-Owned, Women-Owned, Emerging Small Businesses, and/or Service Disabled Veterans Business Enterprises.

“Gross Income” (GI) is income before taxes for all members of one family in the previous twelve months. Income can be derived from salaries, investments, self-employment, farming, and other sources. Assets such as a house or a farm are not income. For people who have wages, gross income means the figure that they would have received in their paychecks if there were no taxes. Gross income before taxes when applied to farm income means the figure that results when farm expenses are subtracted from farm sales. Gross income also includes unemployment and disability compensation, worker's compensation and severance pay; and welfare assistance payments.

“Family” means all persons living in the same household who are related by birth, marriage or adoption.

“Median Family Income” (MFI) includes the income of the householder and all other individuals 15 years old and over in the household, whether they are related to the householder or not. Because many households consist of only one person, average household income is usually less than average family income. Although the household income statistics cover the past 12 months, the characteristics of individuals and the composition of households refer to the time of application. Thus, the income of the household does not include amounts received by individuals who were members of the household during all or part of the past 12 months if these individuals no longer resided in the household at the time of application. Similarly, income amounts reported by individuals who did not reside in the household during the past 12 months but who were members of the household at the time of application are included. However, the composition of most households was the same during the past 12 months as at the time of application, as defined by the U.S. Census.



Construction Excise Tax (CET) Fund Selection Criteria Response

1. **The project is considered an eligible use or activity under Section 3, and benefits households earning less than 80% of the median family income for a period of at least 60 years following the date of construction (threshold verification)*.**

SPARK Newberg has designed a solution targeting the shortage of affordable housing in our community. SPARK Newberg will offer housing, an educational program, and accountability that enables participants to prepare for a home purchase. Applicants will be screened to ensure compliance with the Affordable Housing Commission's directive to benefit households earning less than 80% of AMI. SPARK Newberg's funding model is designed for funding viability in perpetuity.

2. **The project is ready for implementation with documentation to demonstrate financial feasibility.**

SPARK Newberg is currently evaluating available land for acquisition. A successful CET award will be used to purchase land to begin phase one (construction of 10 dwelling units). Any surplus after land acquisition will be used for design and site development. Additional funding sources will include grants and donor contributions. We have applied for a federal grant through the 2026 Community Initiated Project (CIP) Appropriations.

3. **If the project includes the acquisition of property, the identified property is currently available for acquisition and the applicant has secured either a purchase option or letter of interest from the seller. If the applicant is also applying for federal funding, review procurement requirements and limitations before obtaining a purchase option.**

Available properties within the city of Newberg are currently being evaluated targeting a project commencement in September 2025. We have applied for a grant through the 2026 Community Initiated Project (CIP) Appropriations. Therefore, the chosen property will need to undergo the necessary environmental review before securing it. Upon commitment, we will proceed with the required environmental review and submit the findings to the City Council for payment approval.

4. **That relocation of existing residents will be minimized, and when necessary, the applicant has included accurate relocation assistance costs as part of the project pro forma.**

SPARK Newberg will construct new dwelling units. No resident relocation is necessary.

5. **The proposal demonstrates that the Construction Excise Tax (CET) Funds are the most appropriate funding source for the project. Provide a description of a financing gap that includes funding sources or demonstrates budget constraints that limit the ability to pay or finance projects.**

SPARK Newberg's proposal clearly demonstrates that the Construction Excise Tax (CET) Funds are the most appropriate funding source for the project. Due to the unavailability of commercial loans for this type of project, initial funding is essential. SPARK Newberg requires seed money to acquire land to advance this new concept. CET Funds will be instrumental in bridging the financial gap and ensuring the project's feasibility. The attached budget and detailed financial analysis underscore the necessity of CET Funds in achieving the project's objectives and supporting the long-term benefits to the community.

6. **Not included in the application.**

7. **The project provides new affordable housing, or new affordability, through retention or rehabilitation of existing housing, within the city.**

SPARK Newberg proposal meets the Construction Excise Tax (CET) funding criteria by providing new, affordable housing within the Newberg community to benefit households earning less than 80% of AMI.

8. **The project provides deeply affordable housing for households earning less than 50% of the median family income.**

SPARK Newberg is designed to support families earning less than 80% of AMI, ensuring affordability and long-term housing stability for this demographic.

9. **The project provides extremely affordable housing for households earning less than 30% of the median family income. Projects could include permanent supportive housing and/or transitional housing for families or individuals who are houseless. See Criteria #8.**

10. **Project concepts and designs showing close proximity to schools, parks, commercial areas, public transportation, services and jobs, and demonstration of cost-effective sustainability and energy-efficiency measures.**

New dwellings will be constructed within the city limits of Newberg, with careful consideration given to their proximity to local services.

11. **The project maximizes partnerships in the community (volunteers, in-kind contributions, cash contributions, multiple organization involved, etc.) and demonstrates alliance building that directly benefits community members in need, such as helping build household wealth.**

SPARK Newberg will partner with Love INC for multiple facets of the program including applicant screening, mentorships, and education. The grant available to participants who

successfully complete the 48-month program is designed to assist with a down payment on a dwelling. SPARK Newberg will seek community involvement from volunteers and cash/in-kind contributions.

12. The project utilizes already existing resources in effective and innovative ways. The project shall not duplicate services provided by another organization.

This project stands out as a unique initiative within our community, with no other programs or efforts replicating its approach or objectives. It offers a distinct set of benefits and opportunities that are not available through any other local projects.

13. The agency submitting the proposal has the capacity to carry out the project and has had demonstrated successes completing projects of similar scope. Higher points to projects that demonstrate engagement and contracting with D/M/W/ESB/SDVBE businesses in the last 10+ years.

SPARK Newberg is a newly formed organization created by local citizens who recognize the shortage of affordable housing. These individuals bring diverse skills and experiences and are highly motivated to address this challenge.

14. The budget and timeline are thorough and realistic (evidence of construction and/ or service costs required with application).

See attached budget.



SPARK PROGRAM OVERVIEW

1. Program Overview

Mission Statement:

SPARK Newberg is dedicated to empowering individuals and families to overcome housing instability and economic barriers on their journey toward homeownership. By fostering a supportive community and offering practical resources, SPARK aims to create a resilient foundation for participants, equipping them with the knowledge and skills needed to achieve financial stability and self-sufficiency.

Through structured programming and individualized guidance, SPARK focuses on:

- **Supporting People:** Providing stable housing opportunities and a supportive environment to enable participants to grow and thrive, especially those facing significant economic challenges.
- **Achieving Resilience:** Empowering individuals to develop resilience in the face of adversity, encouraging long-term personal growth and financial responsibility.
- **Knowledge:** Equipping participants with essential financial and personal development education, covering budgeting, debt management, and career advancement, ultimately enabling them to become successful homeowners.

SPARK is committed to creating a pathway to sustainable homeownership, where participants gain the tools necessary for a secure, independent future. The program not only addresses immediate housing needs but also builds a strong foundation for lifelong resilience and economic well-being.

Objective:

SPARK Newberg is committed to creating a clear, structured path toward homeownership for individuals and families facing economic challenges. Through a comprehensive program, SPARK empowers participants to build financial stability, develop career skills, and engage meaningfully with their community. By focusing on these core areas, SPARK aims to equip participants with the tools and knowledge needed to overcome barriers to homeownership.

Participants progress through carefully designed phases that include financial literacy training, career development resources, and opportunities for community involvement. These program elements not only provide immediate support but also foster long-term resilience and self-sufficiency. SPARK's objective is to help participants achieve sustainable homeownership, contributing to their personal growth and enhancing community well-being.

This structured journey is supported by a network of community partners and guided by SPARK's dedicated team, ensuring that each participant has access to resources and guidance every step of the way.

2. Program Structure and Phases

SPARK Program Structure and Love INC Newberg's Model

Love INC Newberg's proven model is uniquely equipped to play a pivotal role in the success of the SPARK Program. This includes implementing oversight and program compliance, a program for financial literacy, career development, and personal growth classes. This program is foundational to participants' success and provides the structured support and guidance necessary to achieve long-term program outcomes.

SPARK Program Structure and Phases – Participant

The SPARK Program is designed as a 4-year (48-month) pathway to support participants in achieving sustainable homeownership. The program focuses on financial stability, career development, and personal growth, with a multi-phase approach that allows for scaling and flexibility based on funding and participant needs. Initially, the program will serve 20 families, with the potential to start with fewer units and expand as resources allow.

Phase 1: Foundations (Months 1-12)

Phase 1 of the SPARK program focuses on establishing a strong foundation for participants through financial training, career planning, and community integration. This phase includes structured support, regular check-ins, and opportunities for participants to connect with each other and the broader community.

- **Financial Foundations:** Participants engage in introductory classes covering essential financial skills such as budgeting, expense tracking, and savings strategies. The goal is to help participants develop a stable financial foundation to manage their finances effectively and work towards long-term goals.
- **Career Exploration and Planning:** Participants are paired with mentors to assess their career aspirations, explore job opportunities, and create a clear career path. These sessions encourage participants to set achievable career goals and identify skills needed to advance.
- **Community Integration and Weekly Community Meetings:** Each week, participants attend community meetings led by the On-Site Program Manager. These gatherings are designed to foster a sense of belonging and mutual support. Topics include how to be a caring neighbor, ways to contribute positively to the community, and skills for building a supportive social network. Meetings may also include shared meals, where participants and their families can connect, and activities such as helping each other with personal or household needs to build bonds and reinforce community values weekly.
- **Check-Ins and On-Site Inspections:** The On-Site Program Manager conducts weekly check-ins with each participant to monitor progress, provide guidance, and address any challenges they may be facing. These sessions ensure that participants are actively working toward their financial and career goals. In addition, the Program Manager performs regular on-site inspections to ensure that participants' living environments are safe, supportive, and well-maintained.
- **Quarterly Progress Assessments:** In addition to weekly check-ins, formal progress assessments are conducted quarterly. These reviews help participants and program staff assess achievements, set new goals, and adjust support as needed to keep participants on track.

Phase 2: Growth and Development (Months 13-24)

- **Advanced Financial Management:** Building on foundational knowledge, participants learn about debt management, credit repair, and emergency planning. The goal is to improve financial resilience and creditworthiness.
- **Skill Development and Training:** Classes focus on skill-building, certifications, or further education tailored to each participant's career path. Resume workshops and interview practice sessions are included.
- **Personal Development Workshops:** Topics such as goal setting, time management, and stress management to help participants balance work, personal life, and financial responsibilities.
- **Job Shadowing and Internships:** Partner with local businesses to provide hands-on experience in career fields of interest. This can give participants insight into their career path, build professional networks, and improve their employability.
- **Digital Literacy Training:** Given the increasing reliance on technology, digital skills training (e.g., basic computer skills, online job application processes, and internet safety) would help participants navigate modern workplaces and improve their job prospects.
- **Health and Wellness Education:** Include workshops on physical and mental wellness, emphasizing nutrition, exercise, and stress management techniques. Good health is essential for maintaining productivity and achieving long-term goals.
- **Community Engagement Projects:** Encourage participants to take part in small community service projects. This can build a sense of purpose and connection to the community, reinforcing the value of giving back and helping to foster pride in their neighborhood.
- **Biannual Review:** Midway assessment with SPARK staff to set new goals and adjust plans as needed.

Phase 3: Stabilization and Advancement (Months 25-36)

Phase 3 emphasizes long-term stability and prepares participants for the responsibilities of homeownership and community engagement by focusing on financial resilience, career solidification, and active contribution to their community.

Investment and Retirement Planning:

- **Advanced Financial Planning:** Participants engage in workshops covering investment options, retirement savings plans (like IRAs and 401ks), and strategies for long-term wealth building.
- **Savings Habits:** Emphasis on automating savings for retirement and emergency funds, helping participants establish consistent, disciplined financial practices.

Career Pathway Implementation:

- **Professional Development and Growth:** Participants receive support to grow in their current roles or transition to higher-level positions within their fields. This includes leadership training and certifications that can increase their career prospects.
- **Networking Opportunities:** Regular meet-ups with local professionals, networking events, and access to job shadowing or mentorship with industry leaders help participants expand their professional connections and increase their job security.
- **Ongoing Mentorship:** Mentorship continues to be a focus, with mentors providing guidance on career advancement and handling workplace challenges, ensuring participants are on a stable trajectory.

Community Engagement and Volunteerism:

- **Structured Volunteer Projects:** Participants engage in organized community projects, such as neighborhood clean-ups, local events, or helping at community centers. These activities foster a sense of ownership and pride in their community.
- **Leadership in Community Initiatives:** Those who have demonstrated strong engagement are encouraged to take on leadership roles within community activities, helping to organize and motivate others. This builds leadership skills while reinforcing community ties.
- **Neighborhood Support Groups:** Establish groups focused on mutual aid and support, where participants can continue to build relationships with neighbors and contribute to community resilience.

Annual Review and Goal Re-Evaluation:

- **Comprehensive Evaluation:** A detailed review of participants' financial stability, career growth, and personal development progress. This review will help participants identify areas of improvement and set new objectives for the final program phase.
- **Homeownership Readiness Assessment:** Financial and practical preparations for transitioning to homeownership are assessed. Any remaining barriers to homeownership are identified, with additional support provided to address them.
- **Updated Individual Development Plans:** Based on the review, participants work with SPARK staff to create updated plans that reflect their progress and adjust goals for the final phase.

Phase 4: Transition to Homeownership (Months 37-48)

- **Homeownership Preparation:** Classes on mortgage readiness, understanding homeownership costs, and the purchasing process. Participants finalize their down payment savings and secure any necessary housing assistance.
- **Sustained Employment:** Participants should have established careers or stable jobs that ensure financial security for maintaining homeownership.
- **Education on Hidden Costs of Homeownership:** Offer workshops that cover the hidden expenses associated with owning a home, such as property taxes, homeowners association (HOA) fees, maintenance, and insurance costs. Understanding these additional financial responsibilities helps participants budget effectively and avoid surprises.
- **Legal Aspects of Homeownership:** Provide sessions on legal considerations, including property rights, homeowners' insurance, and understanding property deeds and titles. Familiarity with these legal aspects will empower participants to make informed decisions.
- **Home Maintenance Skills Training:** To prepare participants for the responsibilities of homeownership, the SPARK program includes practical home maintenance skills training. Participants will shadow the property management team or the on-site manager to learn hands-on skills in maintaining a property.
- **Financial Planning for Long-Term Homeownership:** Encourage long-term financial planning that goes beyond the mortgage, including emergency savings for major repairs and future property improvements. This could also include discussions on refinancing options for future financial flexibility.
- **Graduation and Transition Support:** Upon successful completion of the program, participants receive final guidance on transitioning from program housing to independent homeownership.
- **Post-Program Follow-Up:** Optional follow-up support for graduates to assist with any unforeseen challenges in the early stages of homeownership.

Multi-Phase Scalability

- **Flexible Entry Points:** Based on funding and capacity, the program may offer 2-year, 3-year, and 4-year paths, depending on the participant's initial level of financial and personal readiness.
- **Scalable Enrollment:** Begin with fewer units if necessary and increase capacity as funding and support structures grow.
- **Adaptable Curriculum:** Program components can be modified or expanded based on the participants' progress and the availability of additional resources.

This phased structure ensures that participants receive targeted, progressive support tailored to each stage of their journey, fostering long-term stability and community integration as they work toward the goal of homeownership.

3. Participant Eligibility and Intake Process

The SPARK program is committed to providing affordable housing and supporting participants on their path to homeownership. To achieve this goal, we have established specific eligibility criteria to ensure the program reaches those who can benefit most while maintaining program sustainability.

Eligibility Criteria

Income Cap: Participants must have an income at or below 80% of the Area Median Income (AMI) for Yamhill County, based on household size. This income limit ensures the program focuses on families and individuals who may not otherwise have access to affordable housing.

2024 Income Limits by Household Size:

- 1 person: \$66,100
- 2 persons: \$75,550
- 3 persons: \$85,000
- 4 persons: \$94,400
- 5 persons: \$102,000
- 6 persons: \$109,550
- 7 persons: \$117,100
- 8 persons: \$124,650

First-Time Homebuyer Preference: Preference is given to first-time homebuyers (including those who have not owned a home in the past three years). However, previous homeowners are eligible if they meet all other criteria.

Residency Requirements: Applicants must reside within the Newberg Dundee School District to foster local investment and strengthen community ties.

Credit Score and Financial Stability: Participants may be required to meet a minimum credit score and demonstrate financial stability. This requirement helps to ensure that participants are financially prepared for the responsibilities of homeownership.

Employment History: Applicants should show a stable employment record, reflecting their readiness to commit to a long-term investment in homeownership.

Potential Pitfalls and Mitigating Strategies

To prevent challenges common in affordable housing and homeownership programs, we have built safeguards into our eligibility criteria and intake process:

- **High Attrition Rates Due to Financial Instability:**
Mitigation: Applicants must demonstrate financial readiness by meeting credit score requirements and showcasing consistent income history. The program also includes financial education and counseling to strengthen participants' financial management skills.
- **Unrealistic Expectations of Homeownership Costs:**
Mitigation: All participants are required to complete a homeownership preparation course that covers the true costs of homeownership, including maintenance, property taxes, and insurance. This ensures they have a realistic understanding of the financial commitment.
- **Program Dependence and Lack of Transition Readiness:**
Mitigation: The program focuses on fostering independence by emphasizing sustained employment and encouraging savings for homeownership. Additionally, post-program follow-up support is optional to address unexpected challenges without fostering dependence.
- **Potential Credit and Background Check Disqualifications:**
Mitigation: To avoid excluding candidates with minor financial or credit issues, the program offers credit counseling resources. Participants with potential disqualifiers may be given opportunities to improve their financial profile as part of a pre-enrollment phase.
- **Lack of Long-Term Stability:**
Mitigation: The program's focus on stable employment and financial planning aims to build a solid foundation for long-term homeownership success. Eligibility criteria also include employment history to ensure that participants are likely to maintain stability post-program.

By addressing these potential pitfalls, the SPARK program works to ensure that participants are not only eligible but also prepared to transition to stable homeownership successfully, supporting both individual success and program sustainability.

Eligibility Criteria Addendum

To maintain a safe and supportive environment for all program participants, the following eligibility restrictions apply:

Background Check and Safety Requirement: Individuals with a history of sex offenses, as defined by state and federal laws, are disqualified from eligibility for the SPARK Program. This policy ensures the safety and well-being of participating families, particularly those with children, and aligns with community safety standards right to Refuse Admission^{**}: *The SPARK Program reserves the right to decline admission to any applicant if, upon review, it is determined that their participation may compromise the program's integrity, safety, or community standards.* This discretionary right allows the program to uphold a safe and positive environment for all participants, ensuring alignment with its mission and values.

These provisions are designed to prioritize the safety and security of all families in the program, while maintaining the legal right to make case-by-case admission decisions in the best interest of the community.

- **SPARK Program Intake Process:**

- 1. **Initial Online Inquiry**

Prospective participants begin by completing an online inquiry form, where they provide basic information about their interest in the program, household composition, and preliminary eligibility factors, such as income and housing needs.

The online form includes fields for applicants to briefly describe their current housing situation, any goals they have related to homeownership, and their readiness for a structured program like SPARK.

2. In-Person Intake Meeting

Qualified applicants are invited for an in-person meeting to discuss their goals and review the program structure. This meeting serves as an initial assessment of the applicant's commitment to the program and their suitability.

During this session, participants complete an intake questionnaire that includes personal goals, financial aspirations, and long-term housing ambitions. Applicants are also encouraged to articulate their vision for future self-sufficiency and community involvement.

3. Reference and Background Checks

As part of maintaining a safe and secure environment for families in the program, background checks are conducted on all adult applicants. This process screens for criminal history, focusing particularly on disqualifying offenses (e.g., any history of sex offenses).

Applicants are also required to submit references, which may include previous landlords or individuals who can vouch for their character and reliability in a community living setting.

4. Board Interview

Selected applicants undergo an interview with members of the program's board or selection committee. This interview evaluates the applicant's alignment with SPARK's values and commitment to personal growth.

The board interview further explores the applicant's goals, motivation, and plans for long-term financial and housing stability. The board may also assess whether applicants have a viable "exit strategy" for their journey towards homeownership.

To finalize acceptance into the program, applicants must complete a qualification course focused on financial literacy, goal setting, and basic home maintenance skills. This course ensures that all participants have a foundational understanding of the responsibilities involved in homeownership.

The course includes self-assessments and requires participants to identify specific dreams or goals they will work on during their time in the SPARK program.

This intake process aims to thoroughly assess each applicant's readiness and ensure alignment with SPARK's mission of guiding individuals toward sustainable homeownership. The process combines careful vetting with educational requirements to set up participants for success from the start.

4. Participant Commitments and Program Requirements

This section outlines the core commitments and requirements that participants must adhere to throughout their time in the SPARK program. These components are designed to ensure that participants gain financial stability, engage meaningfully with their community, and receive ongoing support and accountability as they progress toward their goals.

1. Financial Training

- **Objective:** Equip participants with the knowledge and skills necessary for long-term financial independence and responsible homeownership.
- **Curriculum Components:**
 - **Budgeting:** Monthly budgeting practices, creating spending plans, and managing cash flow.
 - **Debt Management:** Strategies for reducing debt, understanding interest rates, and prioritizing debt repayment.

- **Credit Repair:** Guidance on improving credit scores, resolving outstanding issues, and responsible credit usage.
- **Tax Planning:** Basics of filing taxes, deductions, and tax-saving strategies for homeowners.
- **Retirement Planning:** Introduction to retirement savings options, such as IRAs and 401(k)s, and long-term financial planning.
- **Required Forms and Materials:**
 - **Financial Goals Worksheet:** Participants outline their short-term and long-term financial goals.
 - **Monthly Budget Tracker:** A worksheet or digital form to track monthly expenses and income.
 - **Debt Reduction Plan:** A personalized form that helps participants document their debts and create a realistic repayment schedule.
 - **Credit Improvement Action Plan:** A checklist or action plan that includes steps to improve credit scores over time.

2. Community Involvement and Volunteerism

- **Objective:** Build a sense of community and foster responsibility by encouraging participants to give back to their neighborhood and community.
- **Expectations:**
 - **Volunteer Hours:** Participants commit to a minimum number of volunteer hours per month, ideally in community programs, local nonprofits, or events that support neighborhood development.
 - **Community Engagement:** Attend at least one community meeting or event per month to stay connected and engaged with local developments.
 - **Reflections:** Participants are encouraged to reflect on their volunteer experiences and how it contributes to their personal growth and community impact.
- **Required Forms and Materials:**
 - **Volunteer Log:** A record for participants to log their volunteer hours, location, and type of service.
 - **Community Engagement Report:** A brief form or digital survey where participants describe their community involvement activities and reflect on their experiences.
 - **Community Service Agreement:** A document detailing the expectations for volunteerism and how it integrates into the SPARK program's goals.

3. Ongoing Assessment

1. **Objective:** Monitor progress toward financial and personal development goals, providing support and adjustments as needed.
2. **Structure:**
 - **Regular Check-Ins:** Monthly or bi-monthly meetings with a SPARK Program Manager or Resident Manager to review financial progress, set new goals, and address challenges.
 - **Financial Reviews:** Semi-annual financial reviews to assess improvements in budgeting, credit, debt management, and overall financial stability.
 - **Goal Re-evaluation:** Participants revisit and, if necessary, adjust their financial and homeownership goals annually.
3. **Required Forms and Materials:**
 - **Progress Check-In Form:** A form used during each check-in to document discussions, challenges, and next steps.
 - **Financial Review Summary:** A document summarizing each participant's financial progress and highlighting areas that need additional focus.
 - **Goal Adjustment Worksheet:** A form for participants to re-evaluate their goals, track completed milestones, and set new objectives.

- 4. Additional Details and Forms Needed:** To effectively implement these programs and assessments, the following additional materials and documents are recommended:
- **Participant Commitment Agreement:** A formal agreement outlining the participant's commitments to financial training, community involvement, and assessments. This should be signed at the beginning of the program.
 - **Community Partnership List:** A directory of recommended community organizations and volunteer opportunities for participants to engage with, making it easier for them to fulfill the community involvement requirement.
 - **Advisor Guide for Check-Ins and Reviews:** A reference guide for SPARK advisors detailing best practices for conducting assessments, tracking progress, and providing constructive feedback to participants.

5. Graduation Requirements

- **Savings for Down Payment:** Upon the successful completion of the 48-month program, the participant may apply for a grant equal to half of their aggregate monthly contributions to the program. These funds will be used toward a down payment.
- **Stable Income and Employment:** Demonstrate financial readiness to sustain homeownership independently.
- **Program Completion:** Final assessments and possible transitional support after completion.

6. Contact Information and Program Leadership

- **Executive Leadership:** List of key leaders and contacts for the program including the Executive Director and the Board of Directors.
 - **Bill Rosacker, Chair**
 - **Doug Cain, Secretary**
 - **Brian Naffin, Treasurer**
 - **Thomas Bellomo,**
 - **Todd Hall**
 - **Dennis Lewis**
 - **Mike Taylor**
 - **Peggy Taylor**

	2025	2026	2027	2028	2029	2030	2031	2032	2033
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SPARK Newberg

Program Fee	-	413,318	425,718	438,489	451,644	465,194	479,149	493,524	508,329
Incoming Grants	7,200,000	-	-	-	-	-	-	-	-
Fund Raising									

Revenue	7,200,000	413,318	425,718	438,489	451,644	465,194	479,149	493,524	508,329
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Labor	69,000	71,070	73,202	75,398	77,660	79,990	82,390	84,861	87,407
Payroll Taxes	10.0% 6,900	7,107	7,320	7,540	7,766	7,999	8,239	8,486	8,741
Benefits	0.0%	-	-	-	-	-	-	-	-
Property Management	8.0%	-	33,065	34,057	35,079	36,132	37,215	38,332	39,482
Office Supplies		-	-	-	-	-	-	-	-
Utilities		-	-	-	-	-	-	-	-
Electricity		-	-	-	-	-	-	-	-
Property Taxes									
Financial Peace University	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
Other Curriculum Costs	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
Insurance	22,500	23,175	23,870	24,586	25,324	26,084	26,866	27,672	28,502
Legal	1,500	1,545	1,591	1,639	1,688	1,739	1,791	1,845	1,900
Accounting	10,000	10,300	10,609	10,927	11,255	11,593	11,941	12,299	12,668
Building Maintenance		47,689	49,120	50,593	52,111	53,674	55,285	56,943	58,651
Marketing/Website Development		-	-	-	-	-	-	-	-
Contingency	10.0%	11,790	20,195	20,801	21,425	22,068	22,730	23,412	24,114
Graduation Grant		165,327	170,287	175,396	180,658	186,077	191,660	197,410	203,332

Expense	129,690	387,474	398,858	410,584	422,661	435,101	447,914	461,112	474,705
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Earnings Before Interest, Taxes, and D&A (EBITDA)	7,070,310	25,844	26,860	27,906	28,983	30,092	31,235	32,412	33,624
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Depreciation	236,364	236,364	236,364	236,364	236,364	236,364	236,364	236,364	236,364
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Interest Expense

Net Income	6,833,946	(210,519)	(209,504)	(208,458)	(207,381)	(206,271)	(205,129)	(203,952)	(202,739)
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Missing Middle Housing Fund
PIE Shop at Autodesk
221 SE Ankeny St, Portland, OR 97214
Nathan.wildfire@missingmiddlehousing.fund

February 21, 2025

Re: SPARK Application to Community Initiated Project (CIP) Appropriations

To whom it may concern:

The Missing Middle Housing Fund (MMHF) is a statewide 501c3 working in Oregon to catalyze middle income housing development. For the past two and a half years, we have worked in Newberg, OR with a diverse group of stakeholders to identify the housing needs of Newberg's citizens, the barriers to housing production at different price points, and solutions to accelerate more housing. Over the course of this work, we have met with and advised the stakeholders of the SPARK project. SPARK is complementary to the work we are leading. While we target housing for middle income earners (80% - 120% of AMI), SPARK targets those earning less than 80% of AMI. This housing is critical to drive economic stability for the people it serves, AND the greater Newberg economy, which is rural in character.

In addition, the project provides for participants to learn great financial literacy, developing skills that will help them one day own a home.

The MMHF fully supports this application for funding and looks forward to this project launching in Newberg, OR, a community we care deeply about.

Sincerely,

Nathan Wildfire
CEO
Missing Middle Housing Fund

February 21, 2025

Senate Appropriations Committee
Room S-128, The Capitol
Washington, DC 20510

RE: CIP Funding Support for SPARK Newberg

Dear Grant Committee Chair,

On behalf of the Strategic Economic Development Corporation of the Mid-Willamette Valley, Oregon (SEDCOR), I am writing in support of CIP funding for the SPARK Newberg project.

SEDCOR is the regional economic development organization (RDO) serving Marion, Polk, and Yamhill counties. Our focus is on business retention and expansion (BRE) and recruitment of traded sector industries. Through employer surveys of our most vital industries, we have repeatedly identified Oregon's housing shortage as the number one concern for employers in regard to their ability to recruit and retain talent.

Our region's Comprehensive Economic Development Strategy for 2023 – 2028 (developed by our Economic Development District - the Mid-Willamette Valley Council of Governments) prioritizes diversified housing solutions as necessary objectives to meeting each of our four goals: Regional Collaboration, Community Infrastructure, Workforce Development and Business Support.

The SPARK Newberg project is a unique housing project concept that bridges the gap between affording housing solutions and home ownership by providing immediate security for local families, coupled with programmatic support – ultimately enabling these families to develop long-term financial strategies through a multi-point support model. This project has drawn the support of local businesses, philanthropists and city leaders. If successfully funded and executed, we expect this project will be used as a model for other communities throughout the state.

We hope you will join us in supporting this unique and innovative project.

Sincerely,



Abisha Stone
SEDCOR - Yamhill County Economic Development Manager

President
Erik Andersson

**2024-2025
Executive Council**

Chair
Ryan Allbritton
Willamette Valley Bank

Vice-Chair
Tony Schacher
Salem Electric

Secretary/Treasurer
Tim Murphy
DCI

Past Chair
Kate Schwarzler
Indy Commons

Members at Large

Michael Fowler
Cabinet Door Service

Mike Keane
Garrett Hemann Robertson

Scott Snyder
The Grand Hotel in Salem

Keith Stahley
City of Salem

Colm Wills
Marion County
Commissioner

March 5, 2025

To Whom It May Concern,

I am writing to express my support for SPARK Newberg and its mission to provide “A Path to Home Ownership.” As president of George Fox University, I have become increasingly concerned about the lack of affordable housing in our community. I believe SPARK Newberg will make a significant impact by helping individuals and families in our community achieve the dream of homeownership.

As you know, homeownership is crucial for financial stability and personal well-being. Employees who are embedded in Newberg and a part of our community help sustain the mission of the University as well. We believe that SPARK Newberg’s efforts to educate and support prospective homeowners are invaluable. I fully endorse SPARK Newberg and encourage others to support their mission.

Together, we can help more people achieve homeownership and build a stronger community.

Sincerely,



Robin Baker
President, George Fox University

AUSTIN INDUSTRIES

February 19, 2025

To Whom It May Concern,

I am writing to express my support for SPARK Newberg and its mission to provide "A Path to Home Ownership." I believe SPARK Newberg will make a significant impact by helping individuals and families in our community achieve the dream of homeownership.

Homeownership is crucial for financial stability and personal well-being. SPARK Newberg's efforts to educate and support prospective homeowners are invaluable. I wholeheartedly endorse SPARK Newberg and encourage others to support their mission.

Together, we can help more people achieve homeownership and build a stronger community.

Sincerely,

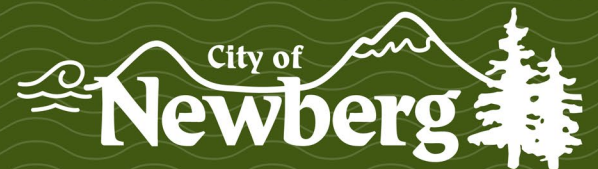
A handwritten signature in black ink, appearing to read "Scott Parrish", with a stylized, flowing script.

Scott Parrish

Chairman of the Board of A-dec, Inc.

Construction Excise Tax Fund Award Recommendations

City Council June 16, 2025



- The Newberg Construction Excise Tax (CET) Fund was adopted in November of 2020. It enabled the City to collect a 1% tax on the value of an eligible building permit. This revenue is intended to be used to address affordability issues for homeowners or renters within Newberg, for households earning less than 80% median family income (MFI).
- The CET expired on July 1, 2023.
- Refunds per Ordinance 2023-2917 have been processed.
- CET Funds collected subtracting refunds to date total \$1,434,287.92.

Background

Account Number (Description)	Budgeted 24/25 (\$)	Recalculated for Supplemental Budget (\$)	Disbursed Awards (\$)	Proposed Awards (\$)
14-9130-605001 (Developer Incentives)	408,345.00	411,831.90		380,615
14-9130-605002 (Oregon Housing & Community Services Department)	122,503.00	123,549.57		
14-9130-605003 (Developer Incentives & Affordable Housing Programs)	988,507.00	898,906.45	310,738.35	
Total	1,519,553.00	1,434,287.87	310,738.35	741,394.52

How Funds Can be Used

- ORS 320.192 and 320.195 provide for a 4% administrative fee to be allocated to the City from the gross CET revenue.
- After the 4% administration fee is deducted, the funds collected from residential projects shall be used for:
 - 50% to fund developer incentives
 - 15% to the Oregon Housing and Community Services Department
 - 35% to fund developer incentives and affordable housing programs
- After the 4% administration fee is deducted, the funds collected from commercial projects shall be used for:
 - 100% to fund developer incentives and affordable housing programs

Eligibility

Eligible recipients of the CET Fund monies are organizations with interest in developing and/or preserving affordable housing in Newberg, such as:

- governmental subdivisions
- community development corporations
- local housing authorities
- community action agencies
- non-profit housing organizations
- for-profit entities and private employers
- private landlords



Submitted Applications

Project: 1201 E Fifth Street Attached Duplex

Applicant: Newberg Area Habitat for Humanity

Funding Request: \$380,615

Form of Funding Requested: CET – Developer Incentive

Project Description: Creation of two new single-family homes to be sold at affordable prices to first-time homebuyers.



Submitted Applications

Project: The Heart of Newberg

Applicant: Catholic Charities of Oregon, Edlen & Co., Community Wellness Collective in partnership with Providence

Funding Request: \$1,000,000

Form of Funding Requested: CET – Developer Incentive

Project Description: A comprehensive affordable housing project including recuperative, permanent supportive, and workforce housing to be built in two phases on a site donated by Providence.



Submitted Applications

Project: SPARK NEWBERG

Applicant: SPARK NEWBERG

Funding Request: \$1,000,000

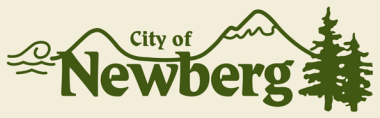
Form of Funding Requested: CET – Developer Incentive

Project Description: Creation of up to 20 dwelling units for qualifying participants of a SPARK curriculum of education and community involvement.

Application Process

CET NOFA APPLICATIONS LOG 2025

	Applicant	Date Received	Staff Review	AHC Review	CC Review	Award Status
Affordable Housing Program						
Developer Incentives	CCO, Edlen & Co., CWC	4/4/2024	4/4/2024 Complete App.	4/22/2025		
	SPARK	3/31/2025	4/10/2024 Complete App.	4/22/2025		
	NAHFH	4/1/2025	4/11/2024 Complete App.	4/22/2025		
Other not Specified						



AHC Recommendation

The Affordable Housing Commission recommended on April 22, 2025, that:

- Not to award fund monies to Catholic Charities of Oregon et al. due to noncommunication status with City staff but they may be considered for a future CET NOFA with a renewed application.
- To fully fund the Newberg Area Habitat Humanity's application request and not to exceed the amount of \$380,615 in order that funds remain for an additional NOFA.
- To not fund the SPARK Newberg project due to not meeting minimum threshold criteria.
- To make a third round CET NOFA posting at the next available opportunity.

Staff is requesting City Council direction on the following AHC recommendations:

- Adopt Resolution No. 2025-3977 awarding \$380,615 to the Newberg Area Habitat for Humanity from the Construction Excise Tax Fund monies.
- Provide direction to staff regarding the release of a third Notice of Funding Availability (NOFA) for remaining CET Fund monies.



Newberg Area Habitat for Humanity

June 16, 2025
1201 E. Fifth St.
CET Funds | City Council



A person wearing a white hard hat and a plaid shirt is kneeling on a green lawn. They are working on a patch of soil that has been dug up, revealing dark brown earth. A small green plant is growing out of the soil in the foreground. The person is looking down at the soil, and their hands are near the edge of the dug-up area.

Contents

- Introduction
- About Newberg Area Habitat
- Current Build
- Homeownership Program
- Volunteers + Homebuyers
- Community Partners
- 1201 E 5th St Overview
- What would CET funds do?

Shannon Selah

- Executive Director since June 2023
- Started volunteering 2009
- Build and Family Selection Committees
- Board of Directors – VP, President
- Former owner, Chehalem Property Management



About our organization

Mission, vision, and principals for the Habitat network.

- **The mission** guides our organization today.
- **The vision** reflects the impact of our organization in the years to come.
- **The principles** provide guidelines for how to enact our mission and vision.

mission



Seeking to put God's love into action...

...Habitat for Humanity brings people together...

...to build homes, communities and hope.

vision

A world where everyone has a decent place to live.

principles

- 1. Demonstrate the love of Jesus Christ.**
- 2. Focus on shelter.**
- 3. Advocate for affordable housing.**
- 4. Promote dignity and hope.**
- 5. Support sustainable and transformational development.**

About Newberg Area Habitat for Humanity

A brief history of our Habitat affiliate

1994: Founded by Diana White of Hillsboro, Julie Ann Hambuchan of Tualatin, and Robert Knowles of Newberg.

1995: Notably, Habitat Oregon is founded.

1996: First home dedicated in October at 1016 S. Pacific St., Newberg.

2009: First ReStore opened at 305 N. Main St. location.

2009: First mortgage payoff in November (921 N. Meridian St., Newberg).

2013: First Veterans Build and first Women Build.

2015: NAHFH ReStore opened at the 801 N. Meridian location, which is fully owned (property and building) by the affiliate.

2021: Completed 29th and 30th homes at 1205 & 1209 E. 5th St.

2023: Broke ground at 717 N College St. Completed 3 Home Repairs. Engaged 440 volunteers.

2024: Demolished old structures and began predevelopment for 2 homes at 1201 E. 5th. Began predevelopment for Dundee Commons multi-use project at 1142 Hwy 99W in Dundee.

2025: 2 full-time, 8 part-time staff, 1 AmeriCorps member (including ReStore). On track to complete 3 homes at 717 N. College St., and begin site and infrastructure work at 1201 E. 5th St. Purchasing additional land at 717 N. College St. (2nd half) for future development of 4 homes. Will repair 12+ homes.

Volunteer contribution
(on record thru 5/16/25):
4,940.01 hours = \$171,616!!!



DATE May 22, 2025

LOCATION 719, 721, & 723 N College St



Homeownership Program

In A Nutshell

- Family Selection Process:

- Credit and Criminal background checks
- Income and Rental verifications
 - 25-60% of Area Median Income (AMI)
- Home Visit
- Ranked upon:
 - Need
 - Ability to Pay
 - Willingness to Partner

Homeownership Program

In A Nutshell

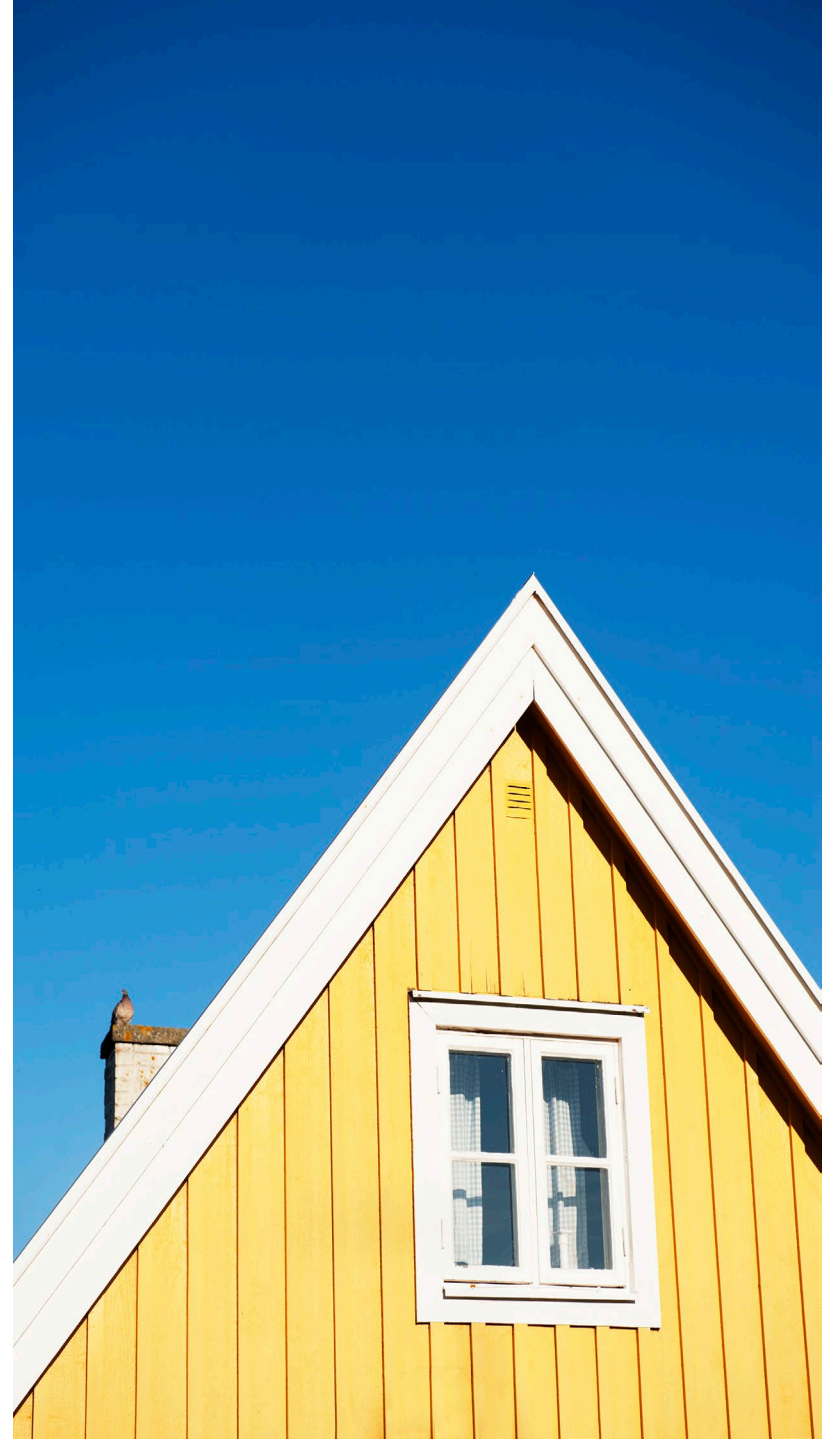
- Family performs 500 volunteer hours called "Sweat Equity"
 - 250 hours – Immediate Family
 - Up to 150 hours – Friends and Family
 - Up to 100 hours – Habitat Volunteers
- HUD-certified Financial Education
- Home Maintenance Classes
- Downpayment Assistance (if avail)
- Downpayment (currently <1% of home price)
- Home Manual provided with keys



Homeownership Program

In A Nutshell

- 30-year mortgage currently offered
- Currently 0% interest + closing costs
- Mortgage payment maximum = 30% of Homebuyer Gross Income
- Home sale price = Affordable Base Price (ABP)
 - ABP is equal to the amount that a family at 80% AMI could afford to pay for the home
 - “Family” = no. bedrooms + 1
- Monthly principal x 30 years = 1st mortgage amount
- Remainder of ABP = silent 2nd mortgage





Land Lease & Permanent Affordability

- ❖ Habitat leases land for 99 years to homeowners
- ❖ Reduces home sale price and property taxes
- ❖ Shared equity model
- ❖ Home may be sold in future to new owner under 80% AMI

The background of the slide is a low-angle photograph of a wooden building frame. The wooden beams are arranged in a complex, crisscrossing pattern, creating a sense of height and structure. The sky is a vibrant blue with scattered white clouds. The overall image conveys a sense of construction, growth, and aspiration.

Common Themes:

- Families pay off mortgage in 10-20 years
- Legacy and generational wealth building
- Children first in family to attend college
- Parents gain continuing education to better job skills
- "Pay It Forward"
- Positive mental health outcomes
- Children have better educational outcomes



**every
one**

deserves a decent
place to live.

Homebuyers + Volunteers
Newberg Area Habitat for Humanity

FEBRUARY 2024, 717 N. COLLEGE ST., NEWBERG

Why are staff and volunteers so committed to Habitat?

- Community bonding
- Providing safe and decent shelter
- Children have a stable place to grow
- Legacy and wealth building for the families partnering with us
- Neighborhood improvement (rehabilitating homes or building new)
- Working alongside parents and older children who are current and future homeowners is FUN!

About our organization

Relationships

- **Construction**
 - Pihl Excavating
 - TerraCalc
 - Hampton Plumbing
 - On Electric
 - Earth Engineers Inc
 - Bowers Concrete
 - Toney Excavating
 - DeMoss & GutterMan
 - Indigo Drywall
 - JB Insulation / UBI
 - Ken's Painting
 - 503 Roofing
- **Corporate Volunteer Groups**
 - Eaton Corp
 - 3D Plastics
 - Jackson Family Wines
- **Suppliers**
 - Parr
 - Hampton Lumber
 - Schneider Electric
- **Community Groups**
 - Rotary
 - City Club
 - Chehalem Valley Chamber of Commerce
 - Kiwanis
- **Congregations**
 - North Valley Friends
 - First Presbyterian
 - First United Methodist
 - Newberg Friends
 - Second Street Community
- **Government**
 - Counties: Yamhill
 - Active City partnerships: Newberg, Dundee

1201 E. 5th St., Newberg

February 2, 2024





1201 E. 5th St., Newberg
November 27, 2024

**Previous two builds:
1205 & 1209 E. 5th St.**



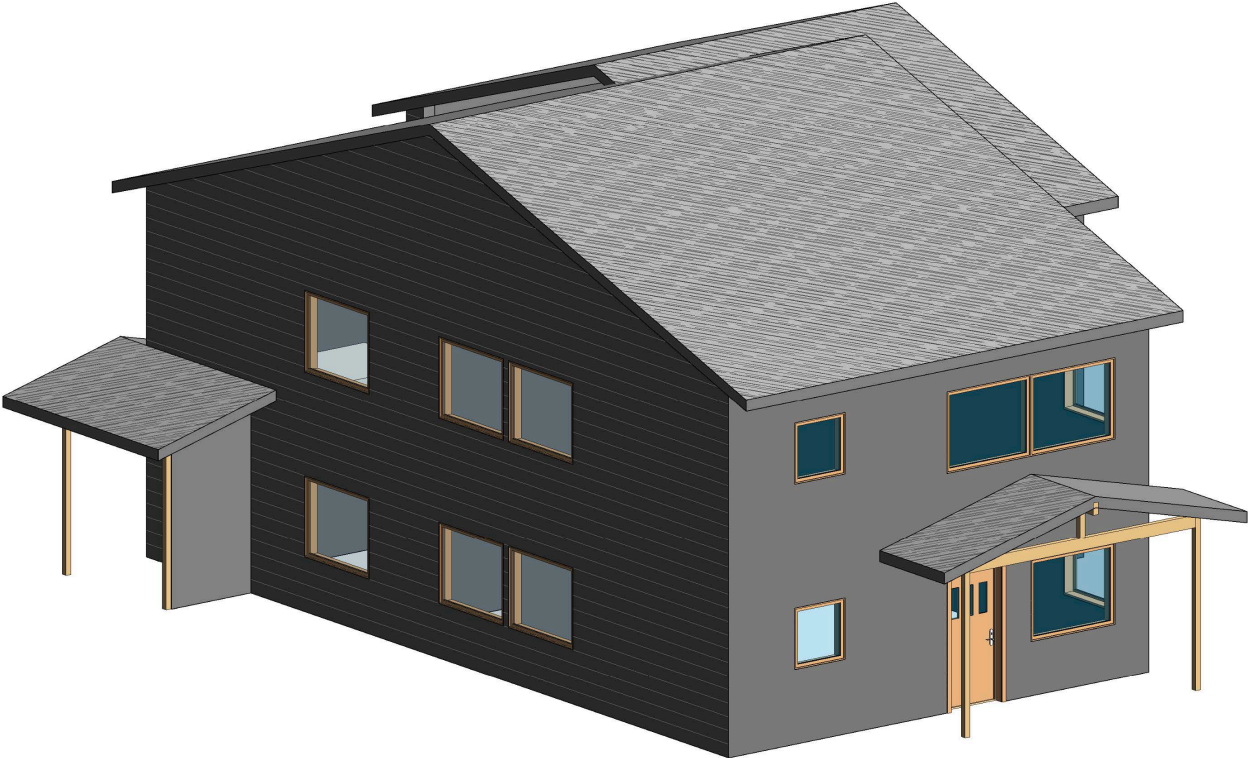
1201 E. Fifth Street, Newberg

Home Design

- Two stacked homes
- Four bedrooms each
- Two baths each
- Corner lot
- Sound barrier construction
- Walkable to downtown

Family Selection

- Downstairs ADA accessible
 - Physical disability
- Veterans Build
- 4+ persons
- Public info session
- 25-60% AMI
- Tie to community



Perspective from Southwest

Pre-Application - March 2024

SUNDIAL DESIGN
Architecture

9175 N.E. Neumann Lane, Newberg, Oregon 97132

Client:
Newberg Habitat for Humanity

Client Address:
801 N. Morton Street, Newberg, Oregon 97132

Project:
Two Dwelling Units on E. Fifth Street

Project Address:
1201 E. Fifth Street, Newberg, Oregon 97132

Perspective View from Southwest

Project number	24.01	Date	21 March 2024
Drawn by	Author	Checked by	Checker

A3.2.1b

SUNDIAL DESIGN ARCHITECTURE,
2024 ALL RIGHTS RESERVED

2024-03-21 9:27:34 AM

CET Funds Would:

- Cover remaining project budget beyond LIFT funds
- Fund:
 - a Veterans Build
 - an ADA Accessible Home
 - affordable homes for two local families
- Free up resources for developing the next 8 homes in pipeline



In Summary

- 1201 E. Fifth Street project will house two local families
- Veterans Build
- ADA Accessible Home
- Walkable to Downtown
- Mortgages Affordable for Families





Thank you for listening!

Questions? Stay in touch:

Shannon Selah
shannon@newberghabitat.org
503-537-9938



City of Newberg
City Council
414 E. First St.
Newberg, OR 97132



May 22, 2025

To the Newberg City Council:

On behalf of Rural Development Initiatives, I am writing to express support for Newberg Area Habitat for Humanity as they seek funding for a housing project to develop much-needed affordable homes at 1201 E. Fifth St., in Newberg.

I have worked with Oregon communities for 26 years and in that time, I have seen the negative impact the affordable housing crisis has had on Oregon families and communities. I support this project because I believe it will have a positive impact on the local Newberg community in the following ways:

- The two homes to be built will increase the supply of affordable housing stock;
- Based on the requirements of the program, the homebuyers selected for the homeownership program will be community members that have already invested in the community and this project will only increase their incentives to invest in the community;
- The project addresses the affordable housing crisis for two particularly vulnerable groups- military veterans and physically disabled persons;
- The project will provide business opportunities for local vendors;
- Lastly, the project provides an important opportunity for community-building for Newberg community members through the involvement of volunteers, homebuyers, staff, and local vendors.

I hope you will consider supporting this affordable housing project by awarding Construction Excise Tax (CET) funds to Newberg Area Habitat. The dollars will help immensely to keep this project moving forward.

Sincerely,

A handwritten signature in blue ink, reading "Heidi Khokhar".

Heidi Khokhar
Executive Director
Rural Development Initiatives
91017 S. Willamette St.
Coburg, Oregon 97408





City of Newberg
City Council
414 E. First St.
Newberg, OR 97132

May 19, 2025

To the Newberg City Council:

On behalf of Unidos Bridging Community and as a longtime resident of Newberg, I am writing to express support for Newberg Area Habitat for Humanity as they seek funding for a housing project to develop much-needed affordable homes at 1201 E. Fifth St., in Newberg.

I have been the Deputy Director for a year and a half and in that time, I have heard about the affordable housing crisis and believe that this project will have a positive impact on the local Newberg community in the following ways:

- The two homes to be built will be four-bedroom stacked homes sold at a price affordable to the homebuyers (30% of their gross monthly income);
- Habitat homebuyers selected for the homeownership program are required to have an income within 25-60% of Area Median Income and a tie to the local community for at least one year prior to application;
- One of the units will be dedicated to a military veteran family, called a Veterans Build;
- The bottom unit is being designed within ADA guidelines for accessibility by physically disabled persons;
- Habitat build projects are built by:
 - Volunteers,
 - Homebuyers, who are required to complete 500 hours of sweat equity,
 - Supervisory staff,
 - Select local vendors, and,
 - Therefore, providing opportunity for community-building in the process of providing needed affordable housing.

I hope you will consider supporting this affordable housing project by awarding Construction Excise Tax (CET) funds to Newberg Area Habitat. The dollars will help immensely to keep this project moving forward.

In solidarity,

A handwritten signature in black ink, appearing to read "Ines Peña", written over a horizontal line.

Ines Peña
Deputy Director
Unidos Bridging Community
ines@unidosyamhillcounty.org

City of Newberg
City Council
414 E. First St.
Newberg, OR 97132

May 21, 2025

To the Newberg City Council:

I am writing to express my strong support for Newberg Area Habitat for Humanity's vital affordable housing project at 1201 E. Fifth St. in Newberg.

As University Pastor for Service & Soul Care at George Fox University for 16 years, and Board Secretary for Newberg Habitat for Humanity, I have witnessed the challenges of the affordable housing crisis firsthand. I firmly believe this project will bring significant, positive impact to our local Newberg community:

- The two four-bedroom stacked homes will be sold at a truly affordable price, capping home buyers' costs at 30% of their gross monthly income.
- Habitat homebuyers are rigorously selected, requiring income within 25-60% of Area Median Income and a minimum one-year tie to the local community.
- One unit is specifically dedicated to a military veteran family, part of their commendable "Veterans Build" effort.
- The bottom unit is thoughtfully designed within ADA guidelines for accessibility by physically disabled persons.
- Habitat projects inherently foster community, built collaboratively by volunteers, homebuyers (who contribute 500 hours of invaluable "sweat equity"), supervisory staff, and select local vendors. This process provides a unique opportunity for profound community-building while addressing a critical need for affordable housing.

I earnestly hope you will consider supporting this essential project by awarding Construction Excise Tax (CET) funds to Newberg Area Habitat. These funds will be instrumental in ensuring its progress and bringing these much-anticipated homes to our community.

Sincerely,



Russ St.Cyr (he/him), [MA](#), [CSD](#), [MCMHC](#)
University Pastor for Service & Soul Care
Office for Spiritual Life - GFU
414 N Meridian, Newberg, OR 97132



Head Start of Yamhill County

1006 NE 3rd Street, Suite A

PO Box 1311

McMinnville, OR 97128

Phone: 503.472.2000

Fax: 503.472.6539

www.yamhillheadstart.org

City of Newberg
City Council
414 E. First St.
Newberg, OR 97132

May 20, 2025

To the Newberg City Council:

On behalf of Head Start of Yamhill County, I am writing to express support for Newberg Area Habitat for Humanity as they seek funding for a housing project to develop much-needed affordable homes at 1201 E. Fifth St., in Newberg.

I have been HSYC's Executive Director for 13 years and in that time, I have heard about the affordable housing crisis and believe that this project will have a positive impact on the local Newberg community in the following ways:

- The two homes to be built will be four-bedroom stacked homes sold at a price affordable to the homebuyers (30% of their gross monthly income);
- Habitat homebuyers selected for the homeownership program are required to have an income within 25-60% of Area Median Income and a tie to the local community for at least one year prior to application;
- One of the units will be dedicated to a military veteran family, called a Veterans Build;
- The bottom unit is being designed within ADA guidelines for accessibility by physically disabled persons;
- Habitat build projects are built by:
 - Volunteers,
 - Homebuyers, who are required to complete 500 hours of sweat equity,
 - Supervisory staff,
 - Select local vendors, and,
 - Therefore, providing opportunity for community-building in the process of providing needed affordable housing.

I hope you will consider supporting this affordable housing project by awarding Construction Excise Tax (CET) funds to Newberg Area Habitat. The dollars will help immensely to keep this project moving forward.

Sincerely,

A handwritten signature in blue ink, appearing to read "Suey Linzmeier".

Suey Linzmeier
Executive Director
Head Start of Yamhill County
Newberg Center Location: 2813 Crestview Drive

Persons with disabilities and limited English proficiency (LEP) have the right to free language assistance and accommodations. HSYC will provide these services upon request.

HSYC is an equal opportunity provider.

City of Newberg
City Council
414 E. First St.
Newberg, OR 97132

May 19, 2025

To the Newberg City Council:

On behalf of Newberg FISH, I am writing to express support for Newberg Area Habitat for Humanity as they seek funding for a housing project to develop much-needed affordable homes at 1201 E. Fifth St., in Newberg.

I have been [Executive Director] for [5] years and in that time, I have heard about the affordable housing crisis and believe that this project will have a positive impact on the local Newberg community in the following ways:

- The two homes to be built will be four-bedroom stacked homes sold at a price affordable to the homebuyers (30% of their gross monthly income);
- Habitat homebuyers selected for the homeownership program are required to have an income within 25-60% of Area Median Income and a tie to the local community for at least one year prior to application;
- One of the units will be dedicated to a military veteran family, called a Veterans Build;
- The bottom unit is being designed within ADA guidelines for accessibility by physically disabled persons;
- Habitat build projects are built by:
 - Volunteers,
 - Homebuyers, who are required to complete 500 hours of sweat equity,
 - Supervisory staff,
 - Select local vendors, and,
 - Therefore, providing opportunity for community-building in the process of providing needed affordable housing.

I hope you will consider supporting this affordable housing project by awarding Construction Excise Tax (CET) funds to Newberg Area Habitat. The dollars will help immensely to keep this project moving forward.

Sincerely,

Vivian Townsend
Executive Director
Newberg FISH
125A S. Elliott Rd.
Newberg, Ore. 97132

Housing Initiative STRATEGY

www.sparknewberg.org



INTRODUCTION : WHAT IS SPARK?



Supporting
People in
Achieving
Resilience and
Knowledge

PARTICIPANT ELIGIBILITY CRITERIA

Households
challenged with
attaining home
ownership

Earning less
than 80% Area
Median Income
(AMI) for
Yamhill County

Agree to
participation in
coaching and
accountability,
including
finance classes

Resident of
and Employed
within
Newberg
School District
Boundary



PARTICIPANT PROCESS

APPLY

Interested parties will participate in an application and interview process.

MOVE-IN

Successful applicants will move into one of the program housing units and participate in a 48 -month program. A monthly fee will be assessed to offset administration, maintenance, and program costs.

FINANCIAL TRAINING

Participants in the program will benefit from coaching in budgeting, expense tracking, emergency planning, debt management, credit management, investment strategy, retirement planning, insurance evaluation, tax planning, and ongoing education enhancing personal finance skills.

HOME OWNERSHIP

Upon successful completion of the program, participants may apply for a grant for up to half of their aggregate program fee to be used toward a down payment on a home of their own.

MEASUREMENT OF SUCCESS



- Sustainability of program in perpetuity
- > 80% rate of completion
- Strong community connections
- Home ownership within 5 years of completion of the program



SPARK Newberg

01

Structure

501(c)(3) Public Charity

02

Governance

Board of Directors

03

Funding

Private donations, local, state, government contributions, grants.

04

Application and Curriculum Administration

Managed by local partners, and utilizing trained volunteers.

BOARD OF DIRECTORS

Todd Hall
Doug Cain
Dennis Lewis
Brian Naffin

Rob Felton
Bill Rosacker
Peggy Taylor
Mike Taylor

OFFICERS

President : Bill Rosacker
Secretary : Doug Cain
Treasurer : Brian Naffin



info@sparknewberg.org



www.sparknewberg.org



PO Box 1060, Newberg, OR 97132

ENDORSERS

A-dec, Inc.

George Fox University

SEDCOR

Missing Middle Housing Fund

The Allison Inn & Spa

Columbia Hospitality

Providence Newberg Medical Center

Newberg Early Birds Rotary Club



info@sparknewberg.org



www.sparknewberg.org



PO Box 1060, Newberg, OR 97132

REQUEST FOR COUNCIL ACTION



Date Action Requested: June 16, 2025

Order ☐ Ordinance ☐ Resolution ☒ Motion ☐ Information ☐

No. 2025-3975

Subject: Public hearing and approval of Supplemental Budget #3 for fiscal year 2024-2025 as described in Exhibit “A”.

Staff: Kady Strode
Department: Finance
File No.

Business Session

Order On Agenda: Public Hearing

Hearing Type: Administrative

Recommendation: Adopt Resolution No. 2025-3975 for approval of Supplemental Budget #3 for fiscal year 2024-2025.

Executive Summary: The changes presented in the Supplemental Budget #3 covers 9 funds. A brief description of the reasons for these changes is provided below. Notice of the supplemental budget public hearing was published in the Newberg Graphic on June 5th, 2025.

Fiscal Impact: The Supplemental Budget #3 results in a net increase in total appropriations of \$345,364, bringing total appropriations to \$144,046,163 and unappropriated ending fund balances of \$15,995 for a total amount of \$144,062,158. The main reason for increase of appropriations was transfer in of funds, recognition of revenue from an outstanding retainage, and additional insurance reimbursement received related to the City Hall flood event. Other changes which had no increase in appropriations moved expenditures between appropriation categories.

Strategic Assessment: The Supplemental Budget #3 allows for better transparency to the public and Council for truing up the budget to actual beginning fund balances and to reflect current expected spending throughout the fiscal year.

RESOLUTION NO. 2025-3975

A Resolution to approve the Supplemental Budget #3 for fiscal year 2024-2025 as described in Exhibit A.

Recitals:

1. The 2024-2025 Budget was adopted by Resolution 2024-3929 on June 3, 2024.
2. The 2024-2025 Supplemental Budget #1 was adopted by resolution on August 5, 2024.
3. The 2024-2025 Supplemental Budget #2 was adopted by resolution on January 21, 2025.
4. Increase in appropriations were related to transfer in of funds, recognition of revenue from an outstanding retainage, and additional insurance reimbursement received related to the City Hall flood event. Other changes which had no increase in appropriations moved expenditures between appropriation categories.
5. In accordance with Oregon Budget Law, notice of this Council public hearing was published in the Newberg Graphic on June 5th, 2025.

The City of Newberg Resolves as Follows:

1. The Council adopts the above recitals.
2. The Council adopts the Supplemental Budget #3 as reflected in the attached Exhibit A which is incorporated in full by this reference. The Council further authorizes the supplemental appropriations reflected in Exhibit A.

Effective Date of this resolution is the day after the adoption date, which is: June 17th, 2025.

Adopted by the City Council of Newberg, Oregon, this 16th day of June, 2025

Rachel Thomas, City Recorder

Attest by the Mayor this _____ day of _____, 2025.

Bill Rosacker, Mayor

**EXHIBIT A TO
RESOLUTION NO. 2025-3975**

City of Newberg
Supplemental Budget #3
Fiscal Year 2024-2025

SUMMARY OF PROPOSED BUDGET CHANGES				
AMOUNTS SHOWN ARE REVISED TOTALS IN THOSE FUNDS BEING MODIFIED				
FUND 01 - GENERAL FUND		BUDGET	CHANGE	REVISED
Resources	<i>Increase</i>	20,965,574	170,113	21,135,687
Contingency	<i>Increase</i>	3,686,970	170,113	3,857,083
Revised Total Resources		21,135,687		
Revised Total Requirements		21,135,687		
<i>Resources include transfers in from Fund 14 Economic Development Fund to move fund balance related to economic development into General Fund where planning personnel is located.</i>				
FUND 06 - WASTEWATER FUND		BUDGET	CHANGE	REVISED
Public Works	<i>Increase</i>	9,147,464	451,152	9,598,616
Contingency	<i>Decrease</i>	16,402,021	(451,152)	15,950,869
Revised Total Resources		29,294,108		
Revised Total Requirements		29,294,108		
<i>Public Works expenditures increase due to planned capital outlay vehicle purchases. Offset comes from Contingency Assigned for Vehicle Replacement.</i>				
FUND 07 - WATER		BUDGET	CHANGE	REVISED
Public Works	<i>Increase</i>	8,321,186	262,496	8,583,682
Transfers	<i>Increase</i>	3,207,222	550,000	3,757,222
Contingency	<i>Decrease</i>	11,893,031	(812,496)	11,080,535
Revised Total Resources		23,480,016		
Revised Total Requirements		23,480,016		
<i>Public Works expenditures increase due to planned capital outlay vehicle purchases. Transfers increased to cover debt payment in Water SDC fund due to less SDC revenue coming in than expecting this fiscal year. Offset comes from Contingency.</i>				
FUND 13 - 911 EMERGENCY		BUDGET	CHANGE	REVISED
Communications	<i>Increase</i>	571,977	40,000	611,977
Contingency	<i>Decrease</i>	75,545	(40,000)	35,545
Revised Total Resources		647,522		
Revised Total Requirements		647,522		
<i>Communications expenditures increased due to more experienced personnel moved into fund to help offset General Fund costs. Contingency serves as offset.</i>				

<u>FUND 14 - ECONOMIC DEVELOPMENT</u>		BUDGET	CHANGE	REVISED
Special Payments	<i>Decrease</i>	1,710,083	(170,113)	1,539,970
Transfers	<i>Increase</i>	-	170,113	170,113
Revised Total Resources		1,894,107		
Revised Total Requirements		1,894,107		
<i>Transfers Out increased due to fund balance related to economic development moving to the General Fund to help transition this fund to close out in the following biennium. Offset is from Special Payments were the funds were currently budgeted but will not be spent.</i>				
<u>FUND 16 - PUBLIC SAFETY FEE</u>		BUDGET	CHANGE	REVISED
Police	<i>Increase</i>	577,179	150,000	727,179
Communications	<i>Increase</i>	269,196	50,000	319,196
Contingency	<i>Decrease</i>	250,406	(200,000)	50,406
Revised Total Resources		1,096,781		
Revised Total Requirements		1,096,781		
<i>Police and Communications expenditures increased due to more experienced staff being placed in this fund. Offset comes from Contingency.</i>				
<u>FUND 17 - STORMWATER</u>		BUDGET	CHANGE	REVISED
Public Works	<i>Increase</i>	2,771,856	301,252	3,073,108
Contingency	<i>Decrease</i>	1,374,081	(301,252)	1,072,829
Revised Total Resources		5,577,937		
Revised Total Requirements		5,577,937		
<i>Public Works expenditures increase due to planned capital outlay vehicle purchases. Offset comes from Contingency Assigned for Vehicle Replacement.</i>				
<u>FUND 21 - GOVERNMENTAL CAPITAL PROJECTS</u>		BUDGET	CHANGE	REVISED
Resources	<i>Increase</i>	72,339	22,540	94,879
Capital Projects	<i>Decrease</i>	72,339	(72,339)	-
Transfers	<i>Increase</i>	-	94,879	94,879
Revised Total Resources		94,879		
Revised Total Requirements		94,879		
<i>Resources increased due to the recognition of revenue related to an outstanding retainage that is no longer owed related to the project. Capital projects decreased and Transfers out was created to close out the fund and move all related fund balance to the Debt Service Fund and apply the remaining funds towards the June debt service payment per guidance from the City's bond counsel.</i>				

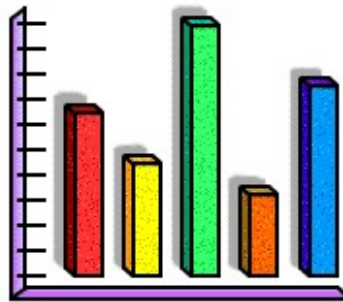
FUND 31 - ADMIN SUPPORT SERVICES		BUDGET	CHANGE	REVISED
Resources	<i>Increase</i>	9,807,393	152,711	9,960,104
City Attorney	<i>Increase</i>	656,264	30,000	686,264
Finance	<i>Increase</i>	2,111,276	75,000	2,186,276
Public Works	<i>Increase</i>	2,015,040	328,046	2,343,086
Contingency	<i>Decrease</i>	1,365,333	(280,335)	1,084,998
Revised Total Resources		9,960,104		
Revised Total Requirements		9,960,104		
<i>Resources increased due additional insurance reimbursement received related to City Hall Flood. City Attorney expenditures increased due to additional hours for part time city prosecutor. Finance expenditures increased due to additional professional services needed for a long-term temp covering and for additional bank fees for utility billing. Public Works expenditures increased due to expenditures related to the City Hall Flood event. Remaining offset came from Contingency.</i>				
Total Increase in appropriations for all funds:			<u>\$ 345,364</u>	
Total Appropriated Budget			130,184,468	
Plus: Increase in appropriations				
Supplemental Budget #1			1,500,000	
Supplemental Budget #2			12,016,331	
Supplemental Budget #3			345,364	
Revised Appropriated Budget			<u>\$ 144,046,163</u>	
Reconciliation of 2024-25 Budget Changes				
<u>Appropriations</u>				
Total Appropriations from original Adopted Budget (June 3, 2024)			\$ 130,184,468	
Changes in appropriations				
Supplemental Budget #1 (August 5, 2024)			1,500,000	
Supplemental Budget #2 (January 21, 2025)			12,016,331	
Supplemental Budget #3 (June 16, 2025)			345,364	
Total Appropriations including Supplemental Budgets			<u>\$ 144,046,163</u>	
<u>Unappropriated Ending Fund Balance (UEFB)</u>				
Unappropriated Ending Fund Balance - Debt Service Fund			15,995	
Total Unappropriated Ending Fund Balance			<u>\$15,995</u>	
Adjusted Adopted Budget (Sum of Appropriations, UEFB, and Reserves)			<u>\$144,062,158</u>	

Supplemental Budget



Summary of Changes

- Total adjustments \$345,364
- Total revenue/expenditures now totals \$144,062,158



General Fund (01)

Resources – *Increased \$170,113*

- Transfer In from Fund 14 Economic Development to move all fund balance related to Economic Development to assist with the eventual closure of the fund
- Moved to the General Fund to reside where staffing lives

Contingency – *Increased by \$170,113*

- To offset adjustments

Admin Services Fund (31)

Resources– Increased by \$152,711

- Additional insurance reimbursement received related to the City Hall Flood event

City Attorney– Increased by \$30,000

- Additional hours incurred by part-time hourly City Prosecutor

Finance– Increased by \$75,000

- Department had a long-term temp help with coverage for employee out on FMLA
- Additional bank fees for Utility Billing

Public Works – Increased by \$328,046

- Expenditures related to City Hall Flood event

Contingency– Decreased by \$280,335

- Offset to adjustments.

Wastewater Fund (06)

Public Works – *Increased by \$451,152*

- Increased due to planned capital outlay purchases

Contingency - *Decreased by \$451,152*

- Offset comes from Contingency Assigned for Vehicle Replacement

Water Fund (07)

Public Works – *Increased by \$262,496*

- Increased due to planned capital outlay vehicle purchases

Transfers – *Increased by \$550,000*

- Transferring revenue to the Water SDC fund to cover debt payment due to less SDC revenue received this fiscal year than anticipated

Contingency – *Decreased by 812,496*

- Offset the adjustments

911 Emergency Fund (13)

Communications— *Increased \$40,000*

- To fully utilize these funds to help offset costs of dispatch

Contingency— *Decreased by \$40,000*

- Offset the increase

Economic Development Fund (14)

Special Payments – *Decreased by \$170,113*

- Decreased due to Economic Development portion moving to the General Fund as part of the eventual closure of the fund

Transfers – *Increased by \$170,113*

- To General Fund where staffing for Economic Development (CDD) are

Public Safety Fee Fund (16)

Police – *Increased by \$150,000*

- To fully utilize these funds to pay for 3 FTE Police Officers

Communications – *Increased by \$50,000*

- We plan to draw the fund balance down because we anticipate the COF to go away in beginning FY26-27

Contingency – *Decreased by \$200,000*

- Offset the adjustments

Stormwater Fund (17)

Public Works – *Increased by \$301,252*

- Expenditures increased due to planned capital outlay vehicle purchases

Contingency– *Decreased by \$301,252*

- Offset to comes from Contingency Assigned for Vehicle Replacement

Gov't Capital Projects Fund (21)

Resources – *Increased by \$22,540*

- Outstanding retainage payable that is no longer owed was recognized as revenue on the books

Capital Projects – *Decreased by \$72,339*

- Closeout of the Communications Tower Upgrade Project

Transfers – *Increased by \$94,879*

- Remaining funds must be applied to Communication Tower Debt Payment – money is transferred to Debt Service Fund.

QUESTIONS?



REQUEST FOR COUNCIL ACTION



Order ☐ Ordinance ☐ Resolution ☐ Motion ☒ Information ☐

Subject: Appointment of Committee Members

Staff: Rachel Thomas
Department: City Recorder

Business Session

Order On Agenda: Council Appointments

June 16, 2025

Is this item state mandated? Yes ☐ No ☒

If yes, please cite the state house bill or order that necessitated this action:

Recommendation: Motion to ratify appointment of the following candidates to their perspective committees:

Rate Review Commission

- Roger Kuhlman, term ending December 31, 2027
- Raquel Peregrino de Brito, term ending December 31, 2027

Executive Summary: These selections will fill the vacancies made by ending terms or resignations over the past year. Recommendations were made by Mayor Bill Rosacker.

Attachment A: Kuhlman Application

Attachment B: Peregrino de Brito Application



Published on *Newberg Oregon* (<https://www.newbergoregon.gov>)

[Home](#) > [Application for Commissions, Committees, and Advisory Boards](#) > [Webform results](#) > Submission #154

Submission information

Form: [Application for Commissions, Committees, and Advisory Boards](#) [1]
Submitted by Visitor (not verified)
Sat, 09/07/2024 - 7:59am
71.238.51.152

Select the Committees/Commissions/Boards on which you would like to be considered.

Budget Committee

Select the Committee/Commission/Board that is your primary preference

Budget Committee

Select the Committees/Commissions/Boards that you are not interested in, if any.

If appointed, I acknowledge I must attend at least 75% of meetings to hold my position.

Yes

Are you applying to be a student commissioner?

No

Have you previously served on a City of Newberg committee? Year and committee name.

Budget committee, 2022, 2023 and 2024

Name

Raquel Peregrino de Brito

Residence Address

[REDACTED]

Mailing Address

Email Address

[REDACTED]

Phone number (optional)

[REDACTED]

Employer/ Occupation

Regulatory Affairs Consultant

Briefly describe your interest in serving on your selected committee/commission/board.

Support the community

Please describe what you know about your selected committee/commission/board.

I have served for 3 years

How would you work collaboratively with community members?

Ask questions on their behalf

Anything else you would like us to know?

If you are not appointed at this time, may we keep your name on file?

Yes

How did you hear about this opportunity?

Other

If you selected Other, please let us know where you heard about this opportunity.

Served a term

- [Home](#)
- [Dashboard](#)
- [Contact Us](#)
- [Logout](#)
- [Staff E-mail](#)

Newberg City Hall | 414 E. First Street | Newberg, OR 97132 | (503) 538-9421 | M-F 8:30-4:30PM

```
function googleTranslateElementInit() { new google.translate.TranslateElement({ pageLanguage:
'en', layout: google.translate.TranslateElement.InlineLayout.SIMPLE }, 'google_translate_element');
}
```



Source URL: <https://www.newbergoregon.gov/node/31324/submission/27523>

Links

[1] <https://www.newbergoregon.gov/bc/webform/application-commissions-committees-and-advisory-boards>

Roger O Kuhlman

City of Newberg, OR | Generated 6/3/2025 @ 6:04 pm by OnBoardGOV - Powered by ClerkBase

Status

Name Roger O Kuhlman
Application Date 5/15/2025
Expiration Date 5/15/2026
Board Member [Roger Kuhlman](#)
Status Validated

Board	Vacancies	Status
Rate Review Committee	5	Pending

Basic Information

Name
Roger O Kuhlman

Contact Information

Address
[Redacted]
[Redacted]
Yes, I am a resident
Yes
Email
[Redacted]
Alternate email
[Redacted]
Cell Phone
[Redacted]

Occupation

Employer/Occupation
Retired
Yes, I am a city employee
No
Professional Licenses
Professional Engineer License

What District are you in?

Briefly describe your interest in serving on your selected committee/commission/board.

Interested in ensuring Newberg has the needed resources to maintain and improve city services

Are you applying to be a student commissioner?

No

If you have served on a City of Newberg committee in the past, please list the year and name of the committee on which you served.

2024-2025 Newberg Traffic Safety Commission

How would you work collaboratively with community members?

In my career as department manager of an electric utility I worked collaboratively with other departments to meet the expectations of our governing Boards

Anything else you would like us to know?

In my career in the electric utility industry I was responsible for leading a team to establish rates that had to be approved by the Board of Directors

If you are not appointed at this time, may we keep your name on file?

Yes

How did you hear about this opportunity?

Word of Mouth

Additional Information

Notes

REQUEST FOR COUNCIL ACTION



Date Action Requested: June 16, 2025

Order <input type="checkbox"/>	Ordinance <input type="checkbox"/>	Resolution <input type="checkbox"/>	Motion <input checked="" type="checkbox"/>	Information <input type="checkbox"/>	Proclamation <input type="checkbox"/>
Subject: Request for Recognition as a Media Representative for Executive Sessions				Staff: Will Worthey Department: Administration	
Business Session				Order On Agenda: New Business	

Is this item state mandated? Yes ☐ No ☒

If yes, please cite the state house bill or order that necessitated this action:

Recommendation:

Council may decide to make one of the following motions:

To recognize Branden Andersen of Newsberg as a member of the press and as such permitted to attend executive sessions of the City of Newberg.

OR

To decline to Branden Andersen of Newsberg as a member of the press and as subsequently deny entry into executive sessions of the City of Newberg.

Executive Summary: Branden Andersen has applied to be recognized as a member of the press and has requested access to City Council Executive Sessions.

It falls to City Council to evaluate Andersen's application to be recognized.

Fiscal Impact: N/A

Council Goals: N/A

Attachment 1: Application for Recognition as a Member of the Press.

Institutional News Media Entity Representative Application

Pursuant to ORS 192.660(4) and Oregon Department of Justice Opinion 8291 (April 18, 2016), the City of Newberg allows representatives of the news media to attend executive sessions of the City Council. Individuals requesting recognition as representatives of news media entities must complete, sign, and submit this application. Please submit this application by personal delivery to [REDACTED] or by via email sent to [REDACTED].

NOTE: The City will not allow you to attend an executive session until it has reviewed and approved your application.

Branden Andersen Newberg Media LLC newberg.org
Your Name Name of News Media Organization Website (if applicable)

215 N Main St. Newberg, OR 97132
Business Address

The news media organization named above (check all that apply):

- ☐ Is a publication that qualifies as a newspaper under ORS 193.010
- ☐ Is an entity that qualifies as a station under ORS 193.310
- ☐ Has an employed staff who are paid regular wages or salary
- ☒ Has a formal business structure (including registration with the Oregon Secretary of State)
- ☒ Regularly and continuously publishes, broadcasts, or transmits news about activities of public concern via television, radio, the internet, or other means
- ☐ Has other characteristics of an institutional news media entity, including (describe below)

Member of UON Publishers Organization, AAN, Society
of Professional Journalists, and the Oregon Media
Collaborative

How many employees does the news media organization have? 1

The news media organization has been published regularly and without interruption since: Feb '25
* See attachment

The news media organization has the following publication schedule (check one)

- ☐ Daily ☒ Weekly ☐ Monthly ☐ Other (describe below)

The following questions have been prepared to gather information and make a determination regarding your qualifications as a "representative of news media" pursuant to ORS 192.660(4) and Oregon Department of Justice Opinion 8291 (April 18, 2016).

What's the formal name of your news media organization?

Newberg Media LLC

What is your business's street address?

215 N Main St. Newberg, OR 97132

In what medium is your news published? If published electronically, what is the website address?

Online. Newberg.org

Is your news media organization registered as a business with the Oregon Secretary of State?

Yes. 2117539-91

Does your news media organization have a formal business structure? If so, please describe it.

Domestic LLC, Sole Proprietorship

Is your news media organization:

- a publication that qualifies as a newspaper under ORS 193.010?

No.

- an entity that qualifies as a station under ORS 193.310?

No.

Does your news media organization have an employed staff who are paid regular wages or salary?

No.

If your organization has an employed staff who are paid regular wages or salary, how many employees does it have?

—

Is your news media organization's publication schedule daily, weekly, or monthly? If your organization follows a different publication schedule, please describe the schedule.

Weekly.

How long has your news media organization been publishing regularly and without interruption?

February 2025. The publication has published weekly since April 2023,

What other characteristics of an institutional news media entity does your organization have? but did not
Member of LION Publishers, Association of Alternative News (AAN), Publish in Jan.
and Society of Professional Journalists. 24 or 25 to

Please provide copies of any of the following forms of evidence or credential(s) that indicate that you allow a
are a representative of your news media organization: break.

- ✓ A press badge or press identification issued by your news media organization

- ✓ A news article or broadcast published or distributed by your news media organization within the last 30 days identifying you as the reporter
- ✓ A masthead or broadcast element including your name as a member of the news-gathering staff of your news media organization
- A letter on letterhead from an editor or officer of your news media organization stating that you are a news-gathering representative of the organization

All evidence attached to this packet.

I am providing copies of the following evidence or credential(s) indicating that I am a representative of the news media organization named above (check all that apply):

- ☒ A press badge or press identification issued by the news media entity
- ☒ A news article or broadcast published or distributed by the news media entity within the last 30 days identifying me as the reporter
- ☒ A masthead or broadcast element including my name as a member of the news-gathering staff of the news media entity
- ☐ A letter on letterhead from an editor or officer of the news media entity stating that I am a news-gathering representative of the entity
- ☐ The following evidence that shows I am a representative of the news media organization named above:

-
- ☒ **(Check only if necessary)** I am also providing provide a copy of the following photo identification to authenticate my identity as the representative indicated in the evidence or credential described above:

Press Badge

CERTIFICATION OF REPRESENTATION

I am an employee, contractor, or authorized agent of the news media organization named above, and I am assigned to gather news on behalf of the organization.

I and the news media organization I represent agree to comply with the City's requirement to maintain the confidentiality of information shared, deliberations that occur, and statements made during an executive session.

I, Brandon Andersen, certify the above to be true and accurate.

BC AR
SIGNATURE

May 14, 2025
DATE

Founding Editor
JOB TITLE

NEWSBERG

Community supported news in Newberg.

Subject: Newsberg — Additional Information Regarding Publishing Schedule

Date: May 14, 2025

Dear Mayor Bill Rosacker and Newberg City Councilors,

Thank you for considering my application for access to Newberg City Council Executive Sessions. I'd like to provide additional context regarding Newsberg's publishing schedule.

Since launching in April 2023, Newsberg has published a weekly newsletter featuring local news, events, comics, and more. However, as a solo operator of a startup publication without additional editorial staff, I paused publishing the newsletter during January 2024 and January 2025. These brief breaks allowed me time to rest and reset before resuming regular weekly coverage for the remainder of the year.

As a journalist, transparency is one of my highest values. While I want to acknowledge the gap in publishing, I also believe it's important to explain the reasoning behind it.

Thank you again for your time and consideration. Please don't hesitate to reach out with any questions.

Branden Andersen

Founding Editor

editor@newsberg.org

541-206-4931

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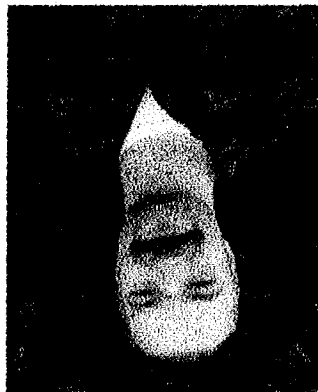
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Bearer of this identification
represents Newsberg Media
LLC as a reporter,
photographer, or both.

Issued 01/01/25
Expires 12/31/25

Branden Andersen
Editor



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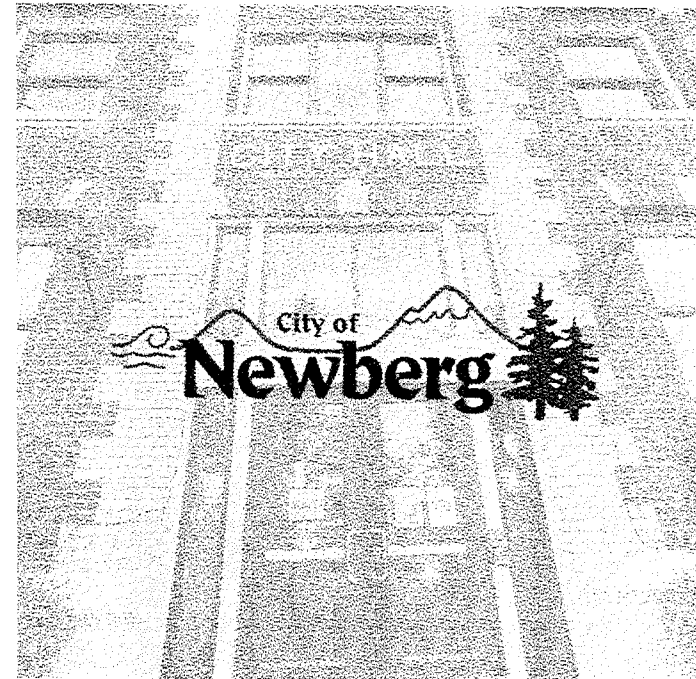
[NEWSLETTER](#)

Newberg City Council Recap | April 21, 2025

Written by:

[Branden Andersen](#)

[May 12, 2025](#)



NEWBERG, Ore. — The Newberg City Council met April 21 to proclaim a National Day of Prayer, provide an overview of city operations, review Taste Newberg's midyear report, learn about the Oregon Main Street program, hear Tualatin Valley Fire & Rescue's annual report, and amend the city's purchasing manual, and discuss strategies for improving downtown Newberg's curb appeal.

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The meeting agenda and minutes are available at the [City of Newberg website](#). Video recording of the meeting is available on [YouTube](#).

Attendance

Present: Councilors Mike McBride, Robyn Wheatley, Peggy Kilburg, Jeri Turgesen, and Derek Carmon; Mayor Bill Rosacker

Absent: Elise Yarnell Hollamon

Proclamations

National Day of Prayer

Mayor Rosacker read a proclamation declaring May 1, 2025, as National Day of Prayer in Newberg. The proclamation noted that the National Day of Prayer was established by Congress in 1952 and amended during the Reagan administration to designate the first Thursday of May annually as the observance.

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City Manager Report

City Manager Will Worthey delivered his monthly operations report covering activity through February 2025. The report includes departmental statistics used as performance benchmarks.

Worthey noted a slowdown in local construction, with only one housing permit issued in February—down from 10 in February 2024. He projected permit activity to increase as the Collina at Springbrook housing project progresses.

Other highlights included a decrease in DUI citations, high winter wastewater production, increased IT activity related to the city's migration to Windows 11, and a rise in public records requests, which increased administrative staff time.

Public Comments

Michael Rossman, Traffic Safety Commission

Rossman addressed the council to share concerns about low morale at the Traffic Safety Commission, citing a lack of resources and authority to serve residents effectively. He requested a dedicated budget to help prioritize traffic safety projects.

Continued Business

Taste Newberg Midyear Report

Executive Director Leigh Jensen and Deputy Director Katie McFall presented Taste Newberg's 2024-25 midyear report. Jensen shared visitor origin data and outlined the organization's long-term strategic plan. McFall discussed destination development efforts focused on branding Newberg as a unique tourism destination, including its "dark skies," "recreation-ready," and "Wheel the World" initiatives.

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Jensen also announced the launch of Taste Newberg's redesigned website and highlighted national public relations efforts.

New Business

Oregon Main Street Presentation

Sheri Stuart of the Oregon Main Street program gave a virtual presentation about the program's goals and the impact it has had on communities with active downtown organizations.

Tualatin Valley Fire & Rescue Report

Deputy Chief Patrick Fale delivered the 2025 State of the District address, which included updates on wildfire deployments,

emergency responses, medical services, levy updates, future capital projects, and recruitment challenges.

Purchasing Manual Amendment

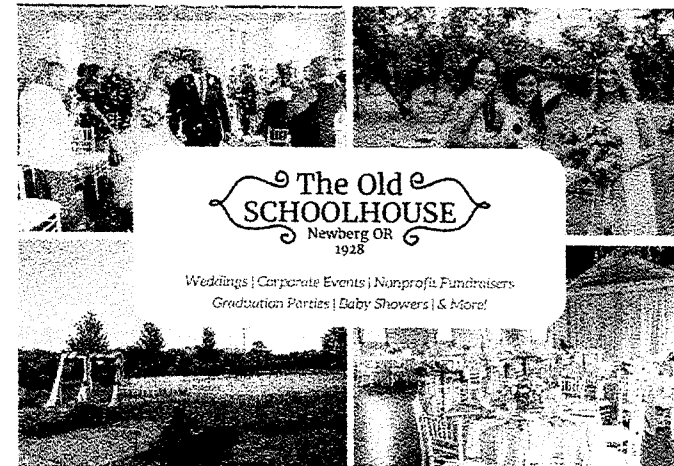
Finance Director Kady Strode presented an amendment to the city's purchasing manual to reflect a new invoicing procedure. The council approved the amendment unanimously.

Council Business

Downtown Beautification

City Manager Worthey shared updates on Operation Curb Appeal, the city's effort to improve the appearance of downtown. He outlined completed and upcoming cleanup tasks being coordinated with Public Works and partner organizations.

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Public Works Director Russ Thomas said trees encroaching on sidewalks will be addressed by the Oregon Department of Transportation in summer 2026. He also said his department has received all necessary lighting equipment and has begun installing three solar lights in the Second Street parking lot, and that project is queued for completion within the month.

Other Business

Mayor Rosacker encouraged councilors to visit the Fairfield Inn & Suites in Newberg, which was celebrating its ribbon-cutting ceremony during the meeting.

Support Local Journalism

Stories like this are only possible with support from readers like you! Your contributions go to enabling free, engaging, informative community journalism and the most comprehensive events calendar in the Newberg-Dundee area.

SUPPORT TODAY

Branden Andersen May 12, 2025 City Council

[Bill Rosacker](#), [Kady Strode](#), [Katie McFall](#), [Leigh Jensen](#), [Patrick Fale](#), [Sheri Stuart](#), [Taste Newberg](#), [Will Worthey](#)

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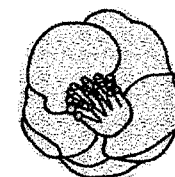
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Newsberg is an independent, locally-owned media outlet providing important stories to the Newberg community.

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About

Newsberg Media LLC is an independent, locally owned media outlet written by a neighbor for neighbors, dedicated to serving the Newberg-Dundee area with important news, events, and stories. Launched in 2023, Newsberg operates daily reporting and a weekly newsletter providing readers with their weekly briefing on what happened, is happening, or will happen in the coming days.

Newsberg Mission

"Service is the rent you pay for the privilege of living on this earth."

– Congresswoman Shirley Chisholm (1994-2005)

Newsberg was founded on the idea that the Newberg-Dundee area deserves a local, independent, non-partisan media outlet to connect

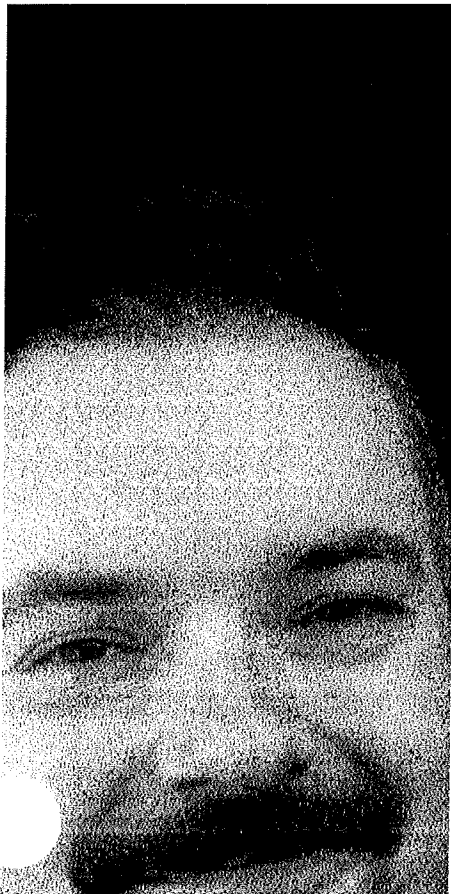
with their community and strengthen the bonds that solidify a happy, healthy town. It operates on three core tenets:

- **Events** before they happen
- **News** that actually matters
- **Community** when it's needed most

Newsberg aims to produce high-quality, objective local journalism that informs the public on local business, government, and quality of life of Chehalem Valley citizens. Newsberg holds public policy-makers, business leaders, and citizens accountable as much as it tells the stories of the people, places, and organizations that make this area so great.

The trust and respect of our audience will never be compromised. Our reporting will be free to all, no matter what.

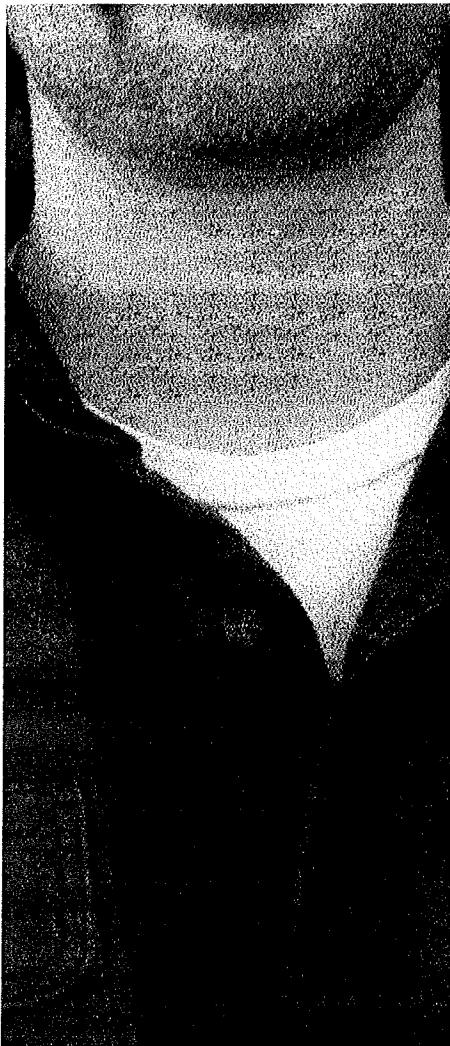
Who Writes Newsberg



Branden Andersen

Founding Editor
editor@newsberg.org

An Oregon native, Branden started his journalism career at the Hickory Daily Record in Hickory, North Carolina when he was in high school. He went on to study journalism and communication at the University of Oregon, where he served as a reporter at the Oregon Daily Emerald and Managing Editor of Flux Magazine. After briefly interning at Portland Monthly Magazine and



the Bend Bulletin (Bend, OR) as a Snowden Intern, he freelanced for publications regionally and nationally before pursuing a career in sales and marketing.

Branden's passion for local news journalism started when he was 15 years old and continues today as he manages *Newsberg* for the deserving Newberg-Dundee community.

Disclosures

Branden Andersen previously served as the Executive Director of the Newberg Downtown Coalition from June 1, 2024 to March 31, 2025. He is now the board president.

Land Acknowledgement

Newsberg acknowledges it is operating on Kalapuyan land. The Kalapuyan people are a part of The Confederated Tribes of the Grand Ronde Community of Oregon, a federally recognized group that includes more than 30 other tribes and bands. We pay our respect to the Kalapuyan People past, present and emerging who have been here since time immemorial.

Newsberg's Ethics Policy

At *Newsberg*, we adhere to the Society of Professional Journalists' Code of Ethics, emphasizing accuracy, fairness, and integrity in our reporting. We promptly correct errors, providing transparent updates both within

the original articles and in our subsequent newsletters. While acknowledging that complete impartiality is challenging, we strive to present facts objectively, allowing readers to form their own conclusions. We are committed to pro-democracy principles, governmental transparency, active community participation, and holding those in power accountable. Our team discloses any community affiliations to maintain trust and avoid conflicts of interest. Additionally, we refrain from political endorsements, except on matters affecting public records access and open government meetings.

[Read Newsberg's full ethics policy.](#)

Artificial Intelligence (AI) Policy

Newsberg tries to find the balance between utilizing the benefits of innovative technologies, including machine learning and artificial intelligence, while minimizing the ethical and privacy risks involved. Artificial Intelligence, also known as AI, is now becoming so ubiquitous, that we find it important to define and disclose our use and policies around the technology. As a small newsroom with 1 full-time employee, AI tools can be a lifeline for otherwise crippling expensive and time intensive work.

[Read Newsberg's full Artificial Intelligence \(AI\) policy.](#)

Diversity, Equity, Inclusion, and Belonging Statement

At Newsberg, we are committed to fostering a culture that embraces diversity, champions equity, promotes inclusion, and strengthens a sense of belonging. We believe that journalism thrives when it reflects

the full breadth of experiences, perspectives, and voices in the communities we serve.

Diversity: We recognize and celebrate the diversity of our team and audience, understanding that a wide range of backgrounds—whether racial, ethnic, cultural, socioeconomic, or otherwise—enriches the stories we tell. We actively seek to hire, represent, and uplift voices from all walks of life.

Equity: We are dedicated to equitable practices, ensuring that all team members have access to the opportunities, resources, and support they need to succeed. We strive to dismantle barriers within our newsroom and the media industry that disproportionately affect underrepresented groups.

Inclusion: We aim to create an inclusive environment where all voices are heard, respected, and valued. This includes cultivating a newsroom culture that encourages collaboration, embraces diverse viewpoints, and fosters a space where people feel empowered to contribute.

Belonging: We are committed to ensuring that everyone—whether a member of our team, a source, or a reader—feels a true sense of belonging within our newsroom. We know that when people feel they belong, their contributions are richer, their perspectives more vibrant, and their participation more impactful.

As journalists, we hold ourselves accountable to these values in our reporting, sourcing, and editorial processes. We strive to represent the communities we serve with integrity, authenticity, and a commitment to truth. We are continuously learning, adapting, and evolving to meet the needs of our team and audience in an ever-changing world.

Corrections

Newsberg and its editorial staff adhere to the code of ethics of the Society of Professional Journalists (SPJ). How we deal with errors and omissions in our reporting is important to maintaining our integrity and the trust of readers and sources.

When *Newsberg* publishes an error, we will acknowledge it and take appropriate steps to correct it as quickly as possible, both online and on our social media platforms. Readers who wish to alert us to errors and omissions can email us at editor@newsberg.org or submit a correction through our [contact form](#).

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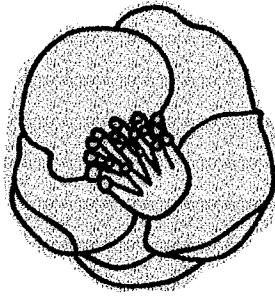
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