



Department of  
Development

Office of Housing and Community Partnerships

# Ohio Housing Trust Fund 2009 Annual Report

---

Prepared By:

Ohio Department of Development

Community Development Division

Office of Housing and Community Partnerships

Ted Strickland, Governor of Ohio  
Lee Fisher, Lt. Governor of Ohio  
Lisa Patt-McDaniel, Interim Director  
Ohio Department of Development

# State Fiscal Year 2009 Ohio Housing Trust Fund Annual Report

For the period: July 1, 2008-June 30, 2009

Introduction and History .....	1
Ohio Housing Trust Fund Advisory Committee Members .....	2
Funding Set-Asides.....	3
Income Targeting .....	4
Eligible Housing and Housing Assistance Activities .....	4
State Fiscal Year 2009 Allocations and Awards .....	5
Accomplishments .....	6
Beneficiaries.....	6
Appendix A Community Development Finance Fund Program	
Appendix B Community Housing Improvement Program	
Appendix C Discretionary Grant Program	
Appendix D Homeless Assistance Grant Program	
Appendix E Housing Assistance Grant Program	
Appendix F Housing Development Assistance Program	
Appendix G Microenterprise Business Development Program	
Appendix H Resident Services Coordinator Program	
Appendix I Training and Technical Assistance Grant Program	

## Introduction

According to Ohio Revised Code Section 174.05, the Ohio Department of Development is required to submit an annual report to the President of the Ohio Senate and the Speaker of the Ohio House of Representatives describing the activities of the department under ORC Section 174.01 to 174.07 during the previous state fiscal year.

## History

To address Ohio's housing needs, Ohio's housing advocates, led by the Coalition on Homelessness and Housing in Ohio, began a grass roots campaign to improve Ohio's housing conditions. The campaign's first success came in November 1990 when Ohio's voters approved Issue 1, a constitutional amendment making housing a public purpose. During the following year, the Ohio Legislature passed implementing legislation (House Bill 339) to establish the Ohio Housing Trust Fund and an Advisory Committee to work with the Ohio Department of Development, the administering agency, to develop the fund's housing programs and policies. In the 1992-1993 Ohio Biennium Budget, \$5 million of state general revenue was allocated to the fund. Immediately, Ohio's housing advocates began lobbying for an Ohio Housing Trust Fund permanent, stable funding source.

For the next 12 years, the fund's allocation level was affected by the state's sluggish economy and the high demand for other state-funded services, including education. During that period, the allocation level fluctuated from \$5 million for a biennium to \$20 million for one year. In 2002, to expand the lines of communication with housing providers, housing developers, bankers, real estate agents, local governments, nonprofit organizations, housing advocates and citizens, then-State Development Director Bruce Johnson established the Affordable Housing Taskforce. After full consideration of the various funding options and housing needs, the taskforce recommended an increase in recordation fees to provide a permanent, dedicated funding source for the Ohio Housing Trust Fund. This was the third committee to recommend an increase in the recordation fees in order to permanently fund the Ohio Housing Trust Fund. Throughout the process, there was a virtual consensus regarding the extent of the affordable housing crisis and the critical role state resources could play in cementing and invigorating the public/private partnerships in Ohio's communities to save, maintain and increase affordable housing for low- and moderate-income families. During the process, the Coalition on Homelessness and Housing in Ohio and the Ohio Department of Development served as advocates and the primary initiators for the permanent funding source by building a statewide advocacy network and encouraging continued communication with the Governor's Office and the State Legislature. In addition, the Coalition on Homelessness and Housing in Ohio collected endorsements for the permanent funding source and launched an e-advocacy tool to increase participation, efficiency and effectiveness of advocacy efforts.

In June 2003, the Ohio Legislature responded to the taskforce's recommendation and the endorsements of more than 900 local governments, businesses, nonprofit service providers, financial institutions and religious organizations from all 88 Ohio counties and included an increase in the recordation fees in the 2004-2005 Ohio Biennium Budget, as a permanent, dedicated funding source for the Ohio Housing Trust Fund.

In the 2008-2009 Ohio Biennium Budget, the Ohio Legislature appropriated \$53 million each year to the Ohio Housing Trust Fund.

## Ohio Housing Trust Fund Advisory Committee Members

The Ohio Revised Code Section 174.06 governs the Ohio Housing Trust Fund Advisory Committee. The committee consists of 14 members appointed by the Governor, with each representing an organization committed to housing and housing assistance for low- and moderate-income persons, as listed below:

### **Grady Appleton**

Representing: Nonprofit Organizations  
Term Expires: December 10, 2011

### **Mary Burke Rivers**

Representing: Individuals and families included in the income groups targeted by Ohio Revised Code Section 174.03  
Term Expires: December 10, 2010

### **Ronald Burson**

Representing: For-Profit Rental Housing Industry  
Term Expires: October 10, 2009

### **Lewis Ellis**

Representing: Nonprofit Organizations  
Term Expires: December 10, 2011

### **Bill Faith**

Representing: A Religious, Civic or Social Service Organization  
Term Expires: December 10, 2010

### **Heidi Fought**

Representing: Townships  
Term Expires: December 10, 2011

### **Donald Freels**

Representing: Licensed Real Estate Brokers  
Term Expires: October 10, 2009

### **Craig Garrelts**

Representing: Local Housing Authorities  
Term Expires: December 10, 2010

### **Jerry Katz**

Representing: Lenders  
Term Expires: October 10, 2009

### **Evelyn King**

Representing: City Governments  
Term Expires: December 10, 2011

### **Deborah Lieberman**

Representing: County Governments  
Term Expires: December 10, 2010

### **David Petroni**

Representing: For-Profit Builders and Developers  
Term Expires: October 10, 2009

### **Rachel Robinson**

Representing: Fair Housing Organizations  
Term Expires: December 10, 2010

### **Cheryl Thiessen**

Representing: Nonprofit Organizations  
Term Expires: December 10, 2010

## Funding Set-Asides

The Ohio Housing Trust Fund appropriation authority is restricted by Ohio Revised Code Section 174.02, as follows:

- Not more than seven percent of the current year appropriation authority<sup>1</sup> can be used for the emergency shelter housing grants program.

In State Fiscal Year 2009, the Ohio Department of Development allocated \$3,710,000 of Ohio Housing Trust Fund appropriation authority to emergency shelter grant programs (7 percent) and awarded the full allocation.

- Not more than 6 percent of the current year's appropriation authority can be used for the transitional and permanent housing programs.

In State Fiscal Year 2009, the Department allocated \$3,180,000 of Ohio Housing Trust Fund appropriation authority to transitional and permanent housing programs (6 percent) and awarded the full allocation.

- Not more than 5 percent of the current year appropriation authority for the fund shall be allocated between grants to community development corporations for the community development corporation grant program and grants and loans to the Ohio community development finance fund, a private nonprofit corporation.

In State Fiscal Year 2009, the Department allocated \$2,650,000 of Ohio Housing Trust Fund appropriation authority to community development corporations and the Ohio community development finance fund (5 percent) and awarded the full allocation.

- In any year that funds exceed \$100,000, not less than \$100,000 can be used to provide training and technical assistance and capacity building assistance to nonprofit development organizations.

In State Fiscal Year 2009, the Department awarded \$160,000 of Ohio Housing Trust Fund dollars to provide training and technical assistance and capacity building assistance to nonprofit development organizations.

- Not less than 50 percent of the funds awarded during any one fiscal year, excluding the 5 percent, 6 percent and 7 percent restrictions listed above, shall be for grants and loans that provide housing and housing assistance to families and individuals in rural areas and small cities that are not eligible to participate as a participating jurisdiction under the HOME Investment Partnerships Act.

In State Fiscal Year 2009, 71 percent of the funds awarded, excluding the 5 percent, 6 percent and 7 percent restrictions listed above, were for grants or loans that provide housing and housing assistance to families and individuals in rural areas that are not eligible to participate as a participating jurisdiction under the HOME Investment Partnerships Act.

- In any year that funds exceed \$250,000, at least \$250,000 of the fund shall be provided to the Ohio Department of Aging for the resident services coordinator program.

In State Fiscal Year 2009, the Department awarded \$315,000 of Ohio Housing Trust Fund dollars, including administration, to the Ohio Department of Aging for the resident services coordinator program.

- Not more than five percent of all the money in the fund shall be used for administration.

In State Fiscal Year 2009, \$2,645,326 of the Ohio Housing Trust Fund dollars (5 percent) were expended for administration.

- Not less than 45 percent of all funds awarded during any one fiscal year shall be awarded to nonprofit organizations.

In State Fiscal Year 2009, 96 percent of all the Ohio Housing Trust Funds were awarded to nonprofit organizations.

---

<sup>1</sup> In SFY 2009, the OHTF appropriation authority was \$53 million.

## Income Targeting

Ohio Revised Code Section 174.03 also includes the following income targeting requirements:

- No more than 20 percent of the current year's appropriation authority, excluding the 5 percent, 6 percent and 7 percent restrictions listed previously, may be awarded for supportive services.

In State Fiscal Year 2009, 11 percent of the appropriation authority, excluding the 5 percent, 6 percent and 7 percent restrictions listed previously, was awarded for supportive services.

- At least 75 percent of the money granted and loaned must be for activities that provide affordable housing/housing assistance to families and individuals whose incomes are equal to or less than 50 percent of the area median income.

In State Fiscal Year 2009, 93 percent of the allocation was dedicated to activities that provide affordable housing/housing assistance to families and individuals whose incomes are equal to or less than 50 percent of the area median income.

- The remainder of funds not granted or loaned above shall be for activities that provide affordable housing and housing assistance to families and individuals whose incomes are equal to or less than 80 percent of the area median income.

In State Fiscal Year 2009, 7 percent of all funds granted or loaned benefitted families and individuals whose incomes are greater than 50 percent of the area median income but less than or equal to 80 percent of the area median income.

- The department shall give preference to viable projects and activities that benefit those families and individuals whose incomes are equal to or less than 35 percent of the area median income.

In State Fiscal Year 2009, 50 percent of the projects and activities benefitted those families and individuals whose incomes were equal to or less than 35 percent of the area median income.

### Eligible Housing and Housing Assistance Award Recipients and Activities

The Ohio Housing Trust Fund provides funding to nonprofit organizations, public housing authorities, private developers and lenders, local governments and consortia of eligible applicants that are interested in increasing affordable housing opportunities, expanding housing services and improving housing conditions for Ohio's low- and moderate-income residents.

Grants, loans, loan guarantees and loan subsidies may be used for:

- acquiring, financing, constructing, leasing, rehabilitating, remodeling, improving and equipping publicly or privately owned housing;
- providing matching money for federal funds received by the state, counties, municipal corporations and townships;
- providing to counties, townships, municipal corporations and nonprofit organizations technical assistance, design and finance services and consultation and payment of predevelopment and administrative costs related to any of the activities listed above; and
- providing supportive services related to housing and the homeless, including counseling.

State Fiscal Year 2009 Ohio Housing Trust Fund Allocations

On June 3, 2008, the Ohio Housing Trust Fund Advisory Committee recommended the allocation of the State Fiscal Year 2009 Ohio Housing Trust Fund dollars and, on June 9, 2008, the Ohio Department of Development approved the recommended allocations. The following is the final State Fiscal Year 2009 Ohio Housing Trust Fund approved allocations:

**Restricted Funds**

Community Development Corporations .....	\$2,650,000
Emergency Shelter Housing .....	3,710,000
Resident Services Coordinator Program .....	300,000
Transitional and Permanent Housing .....	3,180,000
Administration .....	2,650,000
Restricted Subtotal.....	\$12,490,000

**Nonrestricted Funds**

Community Housing Improvement Program.....	\$1,800,000
Discretionary Grant Program .....	1,697,500
Homeless Assistance Grant Program.....	12,012,500
Housing Assistance Grant Program .....	6,000,000
Housing Development Assistance Program .....	19,000,000
Nonrestricted Subtotal .....	\$40,510,000

TOTAL.....	\$53,000,000
------------	--------------

State Fiscal Year 2009 Ohio Housing Trust Fund Awards and Administration

**Restricted**

Community Development Corporations .....	\$2,650,000
Community Development Finance Fund .....	1,900,000
Microenterprise Business Development Program.....	590,000
Training/Technical Assistance and Capacity Building.....	160,000
Emergency Shelter Housing .....	3,710,000
Homeless Assistance Grant Program .....	3,710,000
Resident Services Coordinator Program .....	300,000
Transitional and Permanent Housing .....	3,180,000
Homeless Assistance Grant Program .....	3,180,000
Administration .....	2,645,326
Office of Housing and Community Partnerships .....	1,630,326
Ohio Housing Finance Agency.....	1,000,000
Ohio Department of Aging.....	15,000
Restricted Subtotal.....	\$12,485,326

**Nonrestricted**

Community Housing Improvement Program.....	\$ 1,800,000
Discretionary Grant Program	
AmeriCorps/VISTA Project.....	110,000
Coalition on Homelessness and Housing in Ohio Training and Technical Assistance Program .....	180,000
Habitat for Humanity of Ohio -- Participating Jurisdictions Project .....	200,000
Individual Development Account Homeownership Project .....	47,400
Ohio Home Rescue Fund.....	1,000,000
Preserving Ohio's Affordable Housing Program/Youth Empowerment Program.....	137,500
Homeless Assistance Grant Program.....	12,012,500
Housing Assistance Grant Program .....	6,000,000
Housing Development Assistance Program .....	18,841,000
Nonrestricted Subtotal .....	\$40,328,400
TOTAL.....	\$52,813,726

## Accomplishments

The following are some of the major accomplishments achieved as a result of the allocation of the State Fiscal Year 2009 Ohio Housing Trust Fund monies:

- supportive services/essential services (case management; service referrals; budgeting, life skills, goal setting counseling; etc.) provided to 2,448 households;
- downpayment assistance/homebuyer counseling provided to 411 households;
- construction/rehabilitation/repair of 1,610 rental units and 2,737 homeownership units;
- homelessness prevention (short-term rental assistance, utility assistance, mortgage assistance, etc.) provided to 10,158 households;
- business assistance provided to 65 businesses;
- training and technical assistance provided to 8,037 households; and
- senior service coordination provided to 987 persons.

## Beneficiaries

<u>Allocations By Income Levels</u>	<u>Amount</u>	<u>Beneficiaries</u>
Extremely Low-Income Persons Assisted ( $\leq 35\%$ )	\$24,944,600	68,587
Very Low-Income Persons ( $>35\%$ and $\leq 50\%$ )	21,788,500	15,550
Moderately Low-Income Persons Assisted ( $>50\%$ and $\leq 65\%$ )	785,300	2,261
Low-Income Persons ( $>65\%$ and $\leq 80\%$ )	2,650,000	931
All Persons Assisted	\$50,168,400	87,329

<u>Percent of Funds by Income Category of Funds Awarded</u>	<u>Percent</u>
Income $\leq 35\%$	50%
Income $>35\%$ and $\leq 50\%$	43%
Income $>50$ and $\leq 80\%$	7%

<u>Allocations By Geographic Area</u>	<u>Amount</u>	<u>Beneficiaries</u>
Funds Awarded in Participating Jurisdictions	\$12,689,987	28,226
Funds Awarded in Non-Participating Jurisdictions	33,743,513	44,827
Statewide Organizations	3,734,900	14,276
Total for All Grants Awarded	\$50,168,400	87,329

<u>Percent of Funds by Geographic Area</u>	<u>Percent</u>
Participating Jurisdictions	25.3%
Non-Participating Jurisdictions	67.3%
Statewide Organizations	7.4%

<u>Award Recipient Type</u>	<u>Amount</u>	<u>Beneficiaries</u>
Nonprofit Organizations	\$48,068,400	86,430
Units of Local Government	1,800,000	607
For Profit Organizations	300,000	292
Total	\$50,168,400	87,329

<u>Percent of Funds by Award Recipient Type</u>	<u>Percent</u>
Nonprofit Organizations	96%
Units of Local Government	3.5%
For Profit Organizations	.5%

# Appendix A

Community Development Finance Fund

# Appendix B

Community Housing Improvement Program

# Appendix C

## Discretionary Grant Program

# Appendix D

## Homeless Assistance Grant Program

# Appendix E

## Housing Assistance Grant Program

# Appendix F

Housing Development Assistance Program

# Appendix G

Microenterprise Business Development Program

# Appendix H

Resident Services Coordinator Program

OHIO HOUSING TRUST FUND  
RESIDENT SERVICES COORDINATOR PROGRAM

<u>Grantee</u>	<u>County</u>	<u>State FY</u>	<u>Award</u>
OHIO DEPARTMENT OF AGING	Statewide	SFY-2008	\$315,000

The Ohio Department of Aging will administer the Resident Services Coordinator Program. The OHTF dollars will be awarded to nine nonprofit organizations to provide part-time service coordinators for 18 properties that are recipients of Ohio Housing Tax Credit financing or part of the Ohio Housing Finance Agency's project-based Section 8 portfolio. The goal of the program is to help elderly and disabled low-income residents of rental housing identify and obtain services and benefits offered in the local community. Resident service coordinators interact with residents, residents' families, property management and community service providers. As a result of the program, the residents will have increased access to services and benefits and maintain their independence. In addition, the resident service coordinators will reduce the rental housing owners'/property managers' resident issues burden, help tenant maintain their apartments and comply with the lease terms and decrease turnover and vacancy rates.

Nonprofit Organization	Site	Site Award
Cincinnati Area Senior Services	Walnut Towers	\$ 12,630
	Cambridge Arms I & II	\$ 17,900
	Alexandra Apartments	\$ 12,920
Area Office on Aging of NW Ohio	The Renaissance	\$ 14,000
Ohio District 5 Area Agency on Aging	Harding Hotel	\$ 11,662
	West Park	\$ 21,401
Central Ohio Area Agency on Aging	Harding Hotel	\$ 22,550
	Sharon Glyn	\$ 22,550
Area Agency on Aging District 7	Glendale Apartments	\$ 17,120
	McArthur Park	\$ 10,700
	Hurth (Rivertown)	\$ 14,980
Area Agency on Aging Region 9	Colony Terrace II Apts.	\$ 12,525
	Kontogiannis Terrace Apts.	\$ 12,525
Western Reserve Area Agency on Aging	Canton Towers	\$ 23,500
	The Educators	\$ 18,000
	The South Westerly	\$ 18,000
Community Support Services	Rosaline Apartments	\$ 16,500
District XI Area Agency on Aging	Ashtabula Towers	\$ 20,537

# Appendix I

Training and Technical Assistance Grant Program