

Eastern Oregon Border Economic Development Board Program Handbook

Updated: February 2020

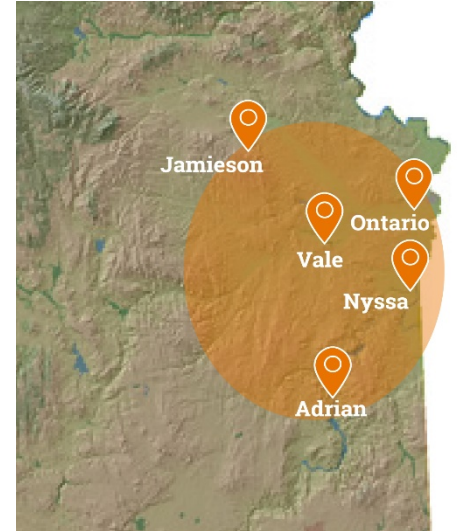
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Introduction

The Eastern Oregon Border Economic Development Region (region) and the Eastern Oregon Border Economic Development Board (board) and Eastern Oregon Border Board Fund (fund) were established by the Oregon Legislature in 2017 through HB 2012. The region is established to promote workforce development, create or retain jobs, expand business and promote economic development within the Oregon communities bordering Idaho. The board and Business Oregon have collaboratively worked to formulate and implement strategies for the \$5 million legislative appropriation to invest in workforce and economic development in the Region.

The region consists of the following areas: within 20 miles of the Oregon border with the state of Idaho, including but not limited to Ontario, Vale, and Nyssa; an area in Oregon that is across the Oregon border from Weiser, Idaho; an area southwest of Vale for a distance of 10 miles; and Willow Creek and Brogan. The shaded area in the map to the right is the basic boundary of the Region.



1 Eastern Oregon Border Region

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

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

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

Eastern Oregon Boarder Board Program and Policy Coordinator
Business Oregon
775 Summer St. NE, Suite 200
Salem, OR 97301-1280

Program Information

Purpose

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

Governing Rules and Statutes

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

Current Oregon Revised Statutes (ORS) applicable to the Eastern Oregon Border Board program can be found in ORS 284.771 to 284.801. Current Administrative Rules can be found in OAR 124, Division 1, Division 5 and Division 10 (specific to the Board) and OAR 123, Division 059 repayment criteria for loans from the Fund.

Eligible Applicants

An eligible applicant includes but is not limited to:

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

NOTE: Not all applicants will be eligible for specific programs. For example, the Infrastructure Revolving Loan Program is only available to local governments and/or developers.

Eligible Projects and Activities

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

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

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

Process

High-level Application Process

Application →	Approval →	Contract →	Perform →	Monitoring →	Close Out

Quick overview

Solicitation or notice of open application rounds will be posted on the board's website and through other local media. Solicitation will provide information on the available programs, when applications will be due and location where applications can be obtained.

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

Complete applications will be scored competitively within each specific program and in accordance with the scoring criteria reflected in the attached sample applications. (See Appendix) Award decisions will be made by the Board.

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

As the project moves forward, recipient may submit a disbursement request to be reimbursed for eligible expenses as outlined in the contractual agreement.

Upon completion of the project, Business Oregon will provide the recipient with the proper grant or loan closeout documents. Once the documents have been received by Business Oregon, the project will be closed out. For projects involving loans, Business Oregon will provide the lien release documents for recording once the loan has been paid in full.

Projects may be monitored for compliance with the program requirements in accordance to the contract agreement. Recipients will be notified in advance of any monitoring visit and will provide the recipient with the details of the monitoring.

Application Information

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

A general application for the loan programs or the grant programs will be available. Due to the multiple programs, supplemental applications may be required depending on the program for which funding is being requested. To ensure the application is as competitive as possible, please be sure to thoroughly and completely answer all questions and provide the requested documentation. For loan programs, documentation may include financial statements, authorization to request/review credit reports of the borrower(s), tax documents, etc. Programs where construction is part of the project, contractor's bids, design documents, building permits, certificates of occupancy, tax receipts, etc. may be required. All requested information should be provided with the application or the application may be denied.

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

E-mail address: eoborderboard@gmail.com

Mailing address:

Eastern Oregon Border Economic Development Board
Attn: Lisa Reeser
PO Box 218
Ontario, Oregon 97914

See sample applications and scoring criteria attached in Appendix A and Appendix B for further information. Applications are available on the Eastern Oregon Border Board webpage at <https://www.oregon4biz.com/EOBED-Board/>.

Remedies

Border Board financing is documented by a Contract, Loan, or Grant Agreement (contract) executed by the applicant and Business Oregon. This contract details the terms and conditions under which financial assistance is provided. In the event an applicant fails to comply with these terms and conditions, Business Oregon may seek appropriate legal remedies.

Border Fund Programs

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

NOTE: Application deadlines have been set by the Board and may be subject to change. Please check the Eastern Oregon Border Board website at <https://www.oregon4biz.com/EOBED-Board/> or contact the Border Board at eoborderboard@gmail.com to confirm application deadlines for the various programs.

Loan Programs

1. Infrastructure Revolving Loan Program: (Application Deadline—May 15 & November 15)

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

Program Overview:

- Loans within the Region for infrastructure investments such as roads, water, wastewater, utilities, etc.
- Eligible applicants are local governments and/or developers within the Region.
- Maximum loan amount is \$250,000 or 25% of eligible project cost.
- Interest rate is 1% with a maturity not to exceed five (5) years.
- Repayment of the loan will be upon the sooner of lots sold/transferred for the first time on a pro-rata basis (if only a portion of the lots are sold/transferred) or at loan maturity.
- Loans must close through a title/escrow company to ensure proper recording of loan documents.
- Board will require to be in first lien position.
- Loan will be underwritten by Business Oregon in accordance to its loan policies.
- Funds will be paid on a reimbursement basis as work is completed and in accordance with the approved scope of work.
- Other funds needed to complete the project must be committed and available to the project to ensure the project can be completed in a timely manner.
- Applications will be accepted on a semi-annual basis.

2. Industrial Land Certification Loan Program: (Application Deadline—May 15 & November 15)

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

Program Overview:

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

Grant Programs**1. Ready Workforce Mobilization Grant (Application Deadline–September 30)**

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

Program Overview:

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

2. Education & Workforce Training Grant (Application Deadline–March 31)

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

Program Overview:

- Eligible applicants are local educational service providers within the Region. Local educational service providers are defined as establishments that provide instruction and training in a wide variety of subjects including, but not limited to, middle schools, high schools, colleges, universities, technical and trade schools, education service districts and training centers.
- Establishments may be privately owned and operated for profit or not for profit or publicly owned and operated.
- Maximum grant is \$200,000 per project.
- Funds may be used for programs, equipment, and/or facility upgrades for workforce training.
- One-to one match is required; exclusive of in-kind match. Matching funds must be identified with the application and available prior to the first draw of funds but no more than 45 days after an award is made. Documentation must be provided.
- Letters of support from the industry for which the training would target must be provided with the application. The purpose is to reflect need for the training, equipment or facility upgrade.
- Funds must be used for direct costs in accordance with the approved scope of work; indirect costs are not eligible.
- Funds will be provided on a reimbursement basis and in accordance to the scope of work.
- Applications will be accepted on an annual basis pending funding availability.

3. Community Improvement Planning Grant (Application Deadline–March 31)

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

Program Overview:

- Grants can be used as a match with local, state, federal planning funds, feasibility studies, preliminary engineering, and initial cost estimates.
- Maximum grant for one entity is \$200,000 for all projects of that entity.
- Preference will be given to projects that can leverage the most amount of funds. Matching funds must be identified with the application and available prior to the first draw of funds but no more than 45 days after an award is made. Documentation must be provided with the application.
- Funds will be provided on a reimbursement basis and in accordance to the scope of work.
- Applications will be accepted on an annual basis.

4. Scott Fairley Memorial Edge Grant (Application Deadline–March 31)

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

Program Overview:

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

Application Samples

Appendix A and B provide a sample of the applications for the grant and loan programs. For the most current version in a fillable format, please go to the Eastern Oregon Border Board's website at <https://www.oregon4biz.com/EOBED-Board/>.

SAMPLE ONLY

Appendix A—Loan Application and Scoring Criteria

Eastern Oregon Border Economic Development Board (EOBEDB) Border Fund Loan Application

Note: Completion of this form does not guarantee funding. The board or its designee may provide comments and suggestions for further project development. For further information about the programs, please contact the Eastern Oregon Border Economic Development Board at eoborderboard@gmail.com.

Applicant

Name	Organization
Street Address	Mailing Address
Office Phone	Web URL

Project Contact

Name	Title
Phone	Email
Phone (cell)	

Project Information

Project Name	
Project Location (physical address/attach map)	
Cost Estimate	Date of Cost Estimate
Estimated Project Start Date	Estimated Completion Date
Estimated Date of First Draw	

SAMPLE ONLY

Applications will be scored based on the proposed project meeting some or all of the priorities of the Border Fund program. Applications should clearly reflect or document how some or all of the priorities will be met. Scoring of program priorities will be as follows:

- Enhance prosperity in the Border Region. 10 points maximum
- Improve the Border Region's property tax base. 10 points maximum
- Improve the Border Region's competitiveness with Idaho. 10 points maximum
- Increase workforce availability and skills in the Border Region. 10 points maximum
- Improve the image of the Border Region. 10 points maximum

Fund Applying For:

☐ Infrastructure Revolving Loan Program (maximum loan amount—\$250,000)

Application deadline: May 15 and November 15

☐ Industrial Land Certification Loan Program (maximum loan amount—\$50,000)

Application deadline: May 15 and November 15

NOTE: Application deadlines have been set by the Board and are subject to change. Please check the Eastern Oregon Border Board website at <https://www.oregon4biz.com/EOBED-Board/> or contact the Border Board at eoborderboard@gmail.com to confirm application deadlines for the various programs.

Funding Request

	Amount	
Funding Request from EOBEDB		
Funds from Applicant		<input type="radio"/> Not Budgeted <input type="radio"/> Budgeted
Other Funds – Pending		
Other Funds – Committed		Provide term(s)
Estimated Total Project Cost	\$ 0	

SAMPLE ONLY

Project Budget

List individual project budget line items with requested budgeted amounts by EOBEDB and non-EOBEDB funding sources. Change budget column labels to identify the specific requested EOBEDB funding sources. Non-EOBEDB sources are those funds other than those requested from the EOBEDB. "Other" budget line items may include, but is not limited to, voice/data/fiber, furniture, fixtures & equipment (FF&E), civil site work, etc.

Budget Line Item	EOBEDB Funds	Non-EOBEDB Funds	Total
Engineering/Architecture	\$0	\$0	
Construction		0	
Construction Contingency		0	
Land Acquisition		0	
Legal & Administrative		0	
Construction Management		0	
Plan Review/Permit Fees		0	
Other (Specify)		0	
Other (Specify)		0	
Other (Specify)		0	
Totals	0	0	

Details of Non-EOBEDB Funds

Source of Non-EOBEDB Funds	Amount	Status: C-Committed, As-Application Submitted, AI-Application Invited, PS-Potential Source	Dates Required Funds will be Committed and Available
	\$0		
Totals	0		

SAMPLE ONLY

Applicants will be scored for providing leverage/match funds in accordance to the table below. Documentation must be provided showing funds needed to complete the project are available and committed. Maximum points = 20

Match: \$

Percent Match Funds in the Project	Maximum Possible Points
51–100%	20 points
26–50%	15 points
1–25%	10 points
0%	0 points

Project Description

Opportunity/Challenge

Describe the opportunity available to or challenge facing the applicant:

SAMPLE ONLY

Proposal/Solution

Describe the proposed solution to the above challenge / opportunity including why EOBEDB funding is requested:

Detailed Project Description

Clearly describe the proposed project work to be accomplished:

SAMPLE ONLY

Project Work Plan

List project activity milestones with estimated start and completion dates:

Activity	Estimated Date	
	Start	Completion

Please attach any additional plans or photos to show scope of work.

Complete the following supplemental questions based on which Border Fund program you are applying for:

Infrastructure Revolving Loan Program (Eligible applicants for this program are local governments and/or developers within the Region)

Match or other funds needed to complete the project are identified in the “Details of Non-EOBEDB Funds” section above:

Yes ☐

No ☐

Are these funds available? (Please provide documentation with the application).

Yes ☐

No ☐

If not, please provide information and associated documentation showing when those funds will be available.

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SAMPLE ONLY

If the specific loan you are applying for is subject to prevailing wage rates/BOLI, how will you comply with those requirements?

Industrial Land Certification Loan Program

Match or other funds needed to complete the project are identified in the "Details of Non-EOBEDB Funds" section above:

Yes ☐

No ☐

Are these funds available? (Please provide documentation with the application).

Yes ☐

No ☐

If not, please provide information and associated documentation showing when those funds will be available.

Site Certification has been received?

Yes ☐

No ☐

If the specific loan you are applying for is subject to prevailing wage rates/BOLI, how will you comply with those requirements?

SAMPLE ONLY

Additional Checklist

Please present the following items, along with a completed program application form. The most recent financial statements should be within 90 days of submitting the application.

PERSONAL RESIDENCE PROJECT

- **Personal Financials**
A recent personal financial statement, 3 years of personal tax returns (all signed & dated)
- **Property Tax Statement**
A copy of the most recent property tax statement

BUSINESS PROJECT

- **Historical and Interim Financials**
Balance sheet, income statement, cash flow statement, financial statement notes, tax returns for last 3 years (all signed & dated)
- **Tax Statement**
A copy of the most recent tax property tax statement (if applicable)
- **Project Plans**
Plot plan and/or drawings of proposed project, map of project site
- **Company Management**
Organization chart of company showing key positions and functions
- **Lender Commitments**
Commitment from lenders financing the project
- **Collateral and Appraisals**
Border Fund may require appraisals
- **Other** _____

SAMPLE ONLY

Application Submission: Prospective borrower completes an application, including any supporting documentation identified in the application and checklist, and submits it to the Eastern Oregon Border Board. Application materials must be complete, including all necessary attachments and required signatures of the applicant. A complete application will help expedite the processing time. Applications may be submitted via e-mail or regular mail. Mailing address is: Eastern Oregon Border Economic Development Board, Attn: Lisa Reeser, PO Box 218, Ontario, Oregon 97914. E-mail address is eoborderboard@gmail.com.

I certify to the best of my knowledge all information, contained in this document and any attached supplements, is valid and accurate.

Signature

Date

Printed Name

Printed Title

SAMPLE ONLY



Eastern Oregon
Border Board
Strengthening Our Region's Economic Future

Border Fund Loan Programs Selection Criteria

Reviewer:

Applicant:

Beneficiary/Recipient (if not the same as applicant):

Project Name:

Project Location:

Fund Applying For:

- ☐ Infrastructure Revolving Loan Program (maximum of \$250,000)
☐ Industrial Land Certification Loan Program (maximum of \$50,000)

Loan Amount Requested: \$

Did the applicant provide a detailed budget? ☐ Yes ☐ No

Does the budget reflect only eligible project activities? ☐ Yes ☐ No

(Funds may be expended only for direct project-related cost associated with the funded project. Indirect costs are not allowed).

Is the budget reasonable for the proposed project? ☐ Yes ☐ No

Match/Leverage: \$

SAMPLE ONLY

Applicant provided documentation showing match is available or will be available the earlier of first draw or 45 days of award notification. (Match is not required but funds to complete the project should be identified and, preferably, available immediately upon an award determination).

Percent Match Funds in the Project	Maximum Possible Points
51–100%	20 points
26–50%	15 points
1–25%	10 points
0%	0 points

Points Awarded:

Reviewer's Comments:

Note to Reviewer: If funds are not available to complete the project, applicant needs to show how funds will be available within 45 days of award or prior to first draw of funds, whichever is sooner. This information and documentation should be included with the application.

Prevailing Wage:

Did the applicant identify if prevailing wage would apply to the project?

☐ Yes ☐ No

If yes, did the applicant provide information as to how they would comply with prevailing wage/BOLI requirements?

☐ Yes ☐ No

Industrial Land Certification Loan Program

Was site certification documentation provided by the applicant?

☐ Yes ☐ No

If no, applicant must provide site certification documentation. If certification has not been received by the applicant, the application must be denied as that is a program requirement.

Goals and Objectives:

Is the proposed opportunity, solution and project description in line with the program for which the applicant is requesting funding?

☐ Yes ☐ No

If no, can applicant provide additional information to meet the goals and objectives of the requested funding program?

Reviewer's Comments:

SAMPLE ONLY

Program Priorities:

Does the proposed project meet some or all of the priorities of the Border Fund program(s)?

Enhance prosperity in the Border Region? (10 points max.) Points Awarded:

Improve the Border Region's property tax base? (10 points max.) Points Awarded:

Improve the Border Region's competitiveness with Idaho? (10 points max.) Points Awarded:

Increase workforce availability and skills in the Border Region? (10 points max.) Points Awarded:

Improve the image of Border Region? (10 points max.) Points Awarded:

Leverage the funds with a complement of outside funding? (10 points max.) Points Awarded:

Does the application clearly align with the Border Board Fund's Return on Investment Criteria and Performance and Outcome Measures? (See attached for details).

☐ Yes ☐ No

Reviewer's Comments:

Additional Documentation:

Did the applicant provide plans and/or photos to support the project scope of work?

☐ Yes ☐ No

Did the applicant provide additional documentation for each loan program, as required for the specific loan program?

☐ Yes ☐ No

Reviewer's Comments:

Financial Review:

Is the financial/underwriting review complete?

☐ Yes ☐ No

SAMPLE ONLY

Was the outcome of the underwriting to recommend funding?

☐ Yes ☐ No

Reviewer's Comments:

Financial Risk: (10 points max)

Points Awarded:

Execution Risk: (10 points max)

Points Awarded:

Potential to Succeed: (10 points max)

Points Awarded:

Total points awarded:

Points Matrix:

Applications receiving 75% and above would be awarded providing there is funding available.

Applications with the highest score will be considered for funding first.

Applications scoring 50%-74% could be awarded on a conditional basis.

Applications scoring less than 50% will be returned and the applicant will be provided some technical assistance and can re-apply the following round.

Funding Recommendation:

- ☐ Recommend Funding—Please provide funding recommendation memo to Business Oregon (75% and above; funding available)
- ☐ Conditional Award—Please provide funding recommendation memo to Business Oregon clearly outlining conditions of award. (50%–74%; funding available)
- ☐ Proposed project needs further development (less than 50%)

SAMPLE ONLY

Eastern Oregon Border Fund—Return on Investment Criteria

Competitive Housing Incentive Program

- Meets program qualifications as listed on application, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, improves the image of the Border Region

Property Improvement Rebate Program

- Enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, improves the image of the Border Region

Housing Rehabilitation Loan Program

- Meets program qualifications as listed on application, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region

Infrastructure Revolving Loan Program

- Acreage developed, number of projects, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region, funds leveraged with a complement of outside funding

Industrial Land Certification Loan Program

- Enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region, funds leveraged with a complement of outside funding

Ready Workforce Mobilization Grant

- Sustainability of project, unique and innovative project, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region, funds leveraged with a complement of outside funding

Education & Workforce Training Grant

- Sustainability of project, unique and innovative project, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region, funds leveraged with a complement of outside funding

Community Improvement Planning Grant

- Unique and innovative project, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region, funds leveraged with a complement of outside funding

Scott Fairley Memorial Edge Grant

- Sustainability of project, unique and innovative project, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region, funds leveraged with a complement of outside funding

SAMPLE ONLY

Eastern Oregon Border Fund—Performance and Outcome Measures

Competitive Housing Incentive Program

- Tax assessed value increase, number of new homes built

Property Improvement Rebate Program

- Tax assessed value increase, amount of funds leveraged

Housing Rehabilitation Loan Program

- Number of sites improved

Infrastructure Revolving Loan Program

- Amount of funds leveraged, expansion of infrastructure, job creation, tax assessed value increase

Industrial Land Certification Loan Program

- Job creation, impact on wages in the Border Region, certification of Regionally Specific Industrial Sites, tax assessed value increase

Ready Workforce Mobilization Grant

- Retention of businesses, number of employees served, number of businesses served, funds leveraged, sustainability of project

Education & Workforce Training Grant

- Amount of funds leveraged, number of workforce trained, retention of trained workforce in the Border Region, jobs placed in the Border Region after training, job creation or retention of businesses, expansion of workforce development that meets business needs or industry standards

Community Improvement Planning Grant

- Amount of funds leveraged, using funds to open up additional outside funding

Scott Fairley Memorial Edge Grant

- Number of innovative projects funded, outcome of project achieved as defined in each application

SAMPLE ONLY

Appendix B—Grant Application and Scoring Criteria

Eastern Oregon Border Economic Development Board (EOBEDB) Border Fund Grant Application

Note: Completion of this form does not guarantee funding. The Board Coordinator may provide comments and suggestions for further project development. For further information about the programs, please contact the Eastern Oregon Border Economic Development Board at eoborderboard@gmail.com.

Applicant

Name	Organization
Street Address	Mailing Address
Office Phone	Web URL

Project Contac

Name	Title
Phone	Email
Phone (cell)	

Project Information

Project Name
Project Location (physical address/attach map)

Applications will be scored based on the proposed project meeting some or all of the priorities of the Border Fund program. Applications should clearly reflect or document how some or all of the priorities will be met. Scoring of program priorities will be as follows:

- Enhance prosperity in the Border Region. 10 points maximum
- Improve the Border Region's property tax base. 10 points maximum
- Improve the Border Region's competitiveness with Idaho. 10 points maximum
- Increase workforce availability and skills in the Border Region. 10 points maximum
- Improve the image of the Border Region. 10 points maximum

SAMPLE ONLY

Fund Applying For:

☐ Ready Workforce Mobilization Grant (maximum of \$100,000)

Application deadline: September 30

☐ Education and Workforce Training Grant (maximum of \$200,000)

Application deadline: March 31

☐ Community Improvement Planning Grant (maximum of \$200,000 all projects per entity)

Application deadline: March 31

☐ Scott Fairley Memorial Edge Grant (maximum of \$25,000)

Application deadline: March 31

NOTE: Application deadlines have been set by the Board and are subject to change. Please check the Eastern Oregon Border Board website at <https://www.oregon4biz.com/EOBED-Board/> or contact the Border Board at eoborderboard@gmail.com to confirm application deadlines for the various programs.

Estimated Funding Request

	Amount	
Funding Request from EOBEDB		
Funds from Applicant		<input type="radio"/> Not Budgeted <input type="radio"/> Budgeted
Other Funds–Pending		
Other Funds–Committed		Provide term(s):
Estimated Total Project Cost	\$ 0	

SAMPLE ONLY

Project Budget

List individual project budget line items with requested budgeted amounts by EOBEDB and non-EOBEDB funding sources. Change budget column labels to identify the specific requested EOBEDB funding sources. Non-EOBEDB sources are those funds other than those requested from the EOBEDB. "Other" budget line items may include, but is not limited to, voice/data/fiber, furniture, fixtures & equipment (FF&E), civil site work, etc.

Budget Line Item	EOBEDB Funds	Non-EOBEDB Funds	Total
Engineering/Architecture	\$0	\$0	
Construction		0	
Construction Contingency		0	
Land Acquisition		0	
Legal & Administrative		0	
Construction Management		0	
Plan Review/Permit Fees		0	
Other (Specify)		0	
Other (Specify)		0	
Other (Specify)		0	
Totals	0	0	

Details of Non-EOBEDB Funds

Source of Non-EOBEDB Funds	Amount	Status: C-Committed, As-Application Submitted, AI-Application Invited, PS-Potential Source	Dates Required Funds will be Committed and Available
	\$0		
Totals	0		

SAMPLE ONLY

Applicants will be scored for providing leverage/match funds in accordance to the table below. For the Education and Workforce Training Grant, match is required. Documentation must be provided showing funds needed to complete the project are available and committed. Maximum points = 20

Match: \$

Percent Match Funds in the Project	Maximum Possible Points
51–100%	20 points
26–50%	15 points
1–25%	10 points
0%	0 points

Project Description

Opportunity/Challenge

Describe the opportunity available to or challenge facing the applicant:

SAMPLE ONLY

Proposal/Solution

Describe the proposed solution to the above opportunity / challenge including why EOBEDB funding is requested:

Detailed Project Description

Clearly describe the proposed project work to be accomplished:

Please attach any additional plans or photos to show scope of work.

SAMPLE ONLY

Complete the following supplemental questions based on which Border Fund program you are applying for:

Ready Workforce Mobilization Grant

Grant will be used for:

Equipment ☐

Facility Upgrades ☐

Start-up costs ☐

Expansion ☐

Other ☐

Please describe: _____

Grant match amount is outlined above: Yes ☐ No ☐

Please specify if not listed above: _____

Approximate number of ready workers that will be served by this grant:

Why are you approaching EOEDB for this funding? Are there other potential sources for this funding? If so, have those been exhausted?

If the grant you are applying for is subject to prevailing wage rates/BOLI, how will you comply with those requirements? _____

Education and Workforce Training Grant

Type of education service provider:

Grant will be used for: Programs ☐

Equipment ☐

Facility Upgrades ☐

Please describe: _____

Grant match amount is provided in the funding request portion of the application (match is required for the Education and Workforce Training Grant)? Yes ☐ No ☐

Please specify if not listed above: _____

SAMPLE ONLY

Approximate number of students that will be served by this grant:

Approximate number of businesses that will be served by this grant:

Industry Letters of Support are attached to this application: Yes ☐ No ☐ How many? _____

Why are you approaching EOBEDB for this funding? Are there other potential sources for this funding? If so, have those been exhausted? _____

If the grant you are applying for is subject to prevailing wage rates/BOLI, how will you comply with those requirements?

Community Improvement Planning Grant

Describe the type of community improvement planning project:

What will be done with the plan once it is completed?

Are there funds available from another source for this type of plan?

Describe the matching (leveraged) funds (if any) for the completion of the community improvement plans:

Describe additional funds (if any) to be awarded upon the completion of the community improvement planning project:

If the grant you are applying for is subject to prevailing wage rates/BOLI, how will you comply with those requirements?

Scott Fairley Memorial Edge Grant

Describe how your project uses innovative and creative solutions to enhance economic vitality and opportunity within the Border Region:

SAMPLE ONLY

Describe your experience and ability to account for and manage funds used to implement this project:

Describe the matching funds (if any) or other sources of funding for this project:

Additional Checklist

Please present the following items, along with a completed program application form. The most recent financial statements should be within 90 days of submitting the application.

BUSINESS PROJECT

- **Historical and Interim Financials**
Balance sheet, income statement, cash flow statement, financial statement notes, tax returns for last 3 years (all signed & dated)
- **Tax Statement**
- A copy of the most recent tax property tax statement (if applicable)
- **Project Plans**
Plot plan and/or drawings of proposed project, map of project site
- **Company Management**
Organization chart of company showing key positions and functions
- **Lender Commitments**
Commitment from lenders financing the project
- **Collateral and Appraisals**
Border Fund may require appraisals
- **Other** _____

SAMPLE ONLY

Application Submission: Prospective grant requestor completes an application and submits it to the Eastern Oregon Border Board. Application materials must be complete, including all necessary attachments and required signatures of the applicant. A complete application will help expedite the processing time. Applications may be submitted via e-mail or regular mail. Mailing address is: Eastern Oregon Border Economic Development Board, Attn: Lisa Reeser, PO Box 218, Ontario, Oregon 97914. E-mail address is eoborderboard@gmail.com.

General Certification

I certify to the best of my knowledge all information, contained in this document and any attached supplements, is valid and accurate.

Signature

Date

Printed Name

Printed Title

SAMPLE ONLY



Eastern Oregon Border Board

Strengthening Our Region's Economic Future

Border Fund Grant Programs Selection Criteria

Reviewer:

Applicant:

Beneficiary/Recipient (if not the same as applicant):

Project Name:

Project Location:

Fund Applying For:

- ☐ Ready Workforce Mobilization Grant (maximum of \$100,000)
- ☐ Education and Workforce Training Grant (maximum of \$200,000)
- ☐ Community Improvement Planning Grant (maximum of \$200,000 all projects per entity)
- ☐ Scott Fairley Memorial Edge Grant (maximum of \$25,000)

Grant Amount Requested: \$

Did the applicant provide a detailed budget? Yes ☐ No ☐

Does the budget reflect only eligible project activities? Yes ☐ No ☐

(Funds may be expended only for direct project-related cost associated with the funded project. Indirect costs are not allowed).

Is the budget reasonable for the proposed project? Yes ☐ No ☐

Match: \$ (Match required for Education and Workforce Training Grant)

SAMPLE ONLY

Match funds and/or funds needed to complete the project are available and committed. (Applicant has provided documentation showing funds are committed and available for the project). (20 points)

Percent Match Funds in the Project	Maximum Possible Points
51–100%	20 points
26–50%	15 points
1–25%	10 points
0%	0 points

Points Awarded:

Reviewer's Comments:

Note to Reviewer: If funds are not available to complete the project, applicant needs to show how funds will be available within 45 days of award or prior to first draw of funds, whichever is sooner. This information and documentation should be included with the application.

Goals and Objectives:

Is the proposed opportunity, solution and project description in line with the program for which the applicant is requesting funding?

☐ Yes ☐ No

If no, can applicant provide additional information to meet the goals and objectives of the requested funding program?

Reviewer's Comments:

Program Priorities:

Does the proposed project meet some or all of the priorities of the Border Fund program(s)?

Enhance prosperity in the Border Region? (10 points max.) Points Awarded:

Improve the Border Region's property tax base? (10 points max.) Points Awarded:

Improve the Border Region's competitiveness with Idaho? (10 points max.) Points Awarded:

Increase workforce availability and skills in the Border Region? (10 points max.) Points Awarded:

Improve the image of Border Region? (10 points max.) Points Awarded:

Leverage the funds with a complement of outside funding? (10 points max.) Points Awarded:

SAMPLE ONLY

Reviewer's Comments:

Additional Documentation:

Did the applicant provide plans and/or photos to support the project scope of work?

☐ Yes ☐ No

Did the applicant provide additional documentation for each grant program, as required for the specific grant program?

☐ Yes ☐ No

Does the application clearly align with the Border Board Fund's Return on Investment Criteria and Performance and Outcome Measures? (See attached for details).

☐ Yes ☐ No

Reviewer's Comments:

Financial Risk: (10 points max)

Points Awarded:

Execution Risk: (10 points max)

Points Awarded:

Potential to Succeed: (10 points max)

Points Awarded:

Total points awarded:

Points Matrix:

Applications receiving 75% and above would be awarded providing there is funding available.

Applications with the highest score will be considered for funding first.

Applications scoring 50%-74% could be awarded on a conditional basis.

Applications scoring less than 50% will be returned and the applicant will be provided some technical assistance and can re-apply the following round.

Funding Recommendation:

- ☐ Recommend Funding—Please provide funding recommendation memo to Business Oregon (75% and above; funding available)
- ☐ Conditional Award—Please provide funding recommendation memo to Business Oregon clearly outlining conditions of award. (50%–74%; funding available)
- ☐ Proposed project needs further development (less than 50%)

SAMPLE ONLY

Eastern Oregon Border Fund—Return on Investment Criteria

Competitive Housing Incentive Program

- Meets program qualifications as listed on application, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, improves the image of the Border Region

Property Improvement Rebate Program

- Enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, improves the image of the Border Region

Housing Rehabilitation Loan Program

- Meets program qualifications as listed on application, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region

Infrastructure Revolving Loan Program

- Acreage developed, number of projects, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region, funds leveraged with a complement of outside funding

Industrial Land Certification Loan Program

- Enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region, funds leveraged with a complement of outside funding

Ready Workforce Mobilization Grant

- Sustainability of project, unique and innovative project, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region, funds leveraged with a complement of outside funding

Education & Workforce Training Grant

- Sustainability of project, unique and innovative project, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region, funds leveraged with a complement of outside funding

Community Improvement Planning Grant

- Unique and innovative project, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region, funds leveraged with a complement of outside funding

Scott Fairley Memorial Edge Grant

- Sustainability of project, unique and innovative project, enhances prosperity in the Border Region, improves property tax base, improves Border Region's competitiveness with Idaho, increases workforce availability and skills in the Border Region, improves the image of the Border Region, funds leveraged with a complement of outside funding

SAMPLE ONLY

Eastern Oregon Border Fund—Performance and Outcome Measures

Competitive Housing Incentive Program

- Tax assessed value increase, number of new homes built

Property Improvement Rebate Program

- Tax assessed value increase, amount of funds leveraged

Housing Rehabilitation Loan Program

- Number of sites improved

Infrastructure Revolving Loan Program

- Amount of funds leveraged, expansion of infrastructure, job creation, tax assessed value increase

Industrial Land Certification Loan Program

- Job creation, impact on wages in the Border Region, certification of Regionally Specific Industrial Sites, tax assessed value increase

Ready Workforce Mobilization Grant

- Retention of businesses, number of employees served, number of businesses served, funds leveraged, sustainability of project

Education & Workforce Training Grant

- Amount of funds leveraged, number of workforce trained, retention of trained workforce in the Border Region, jobs placed in the Border Region after training, job creation or retention of businesses, expansion of workforce development that meets business needs or industry standards

Community Improvement Planning Grant

- Amount of funds leveraged, using funds to open up additional outside funding

Scott Fairley Memorial Edge Grant

- Number of innovative projects funded, outcome of project achieved as defined in each application

Appendix C-Shovel Ready Certification Grants

MEMORANDUM

Date: October 3, 2018

To: Chris Cummings, Assistant Director

From: Daniel Holbrook, AICP, Industrial Lands Specialist

Subject: SPWF Handbook Addendum—Planning Grants for Shovel Ready Certification

SPWF Planning grants may be used to pay for third party consultant costs associated with Shovel Ready Certification reviews. To engage the program, the following expedited process for this less than \$7K per project grant will need to be followed. First, the statutory authority and policies that guide this work will be reviewed.

Statutory review, the Special Public Works Fund per statute may directly or indirectly grant, expend or loan moneys in the fund or extend credit to purchase goods or services related to a project on behalf of a municipality per ORS 285B.455 (6)(b).

Furthermore, OAR 123-42-0020 broadly defines “planning projects” which includes technical or other feasibility reports, study or plan related to a potential development. And, OAR 123-042-0045 permits planning grants for industrial site certification. The land must be zoned “industrial;” and the land meets marketability standards as determined by the department using its adopted policy. Grants of up to \$60,000 per site, per biennium or 85% of the allowable planning project cost, whichever is less.

Funding Process:

1. The applying municipality submits the Certified Shovel Ready [Commitment for Certification](#) form; staff can add a box that specifies that a grant to cover the costs for a third party review is being requested. Note, this is only for publicly owned sites and this form will act as the intake and application for SPWF funding.
2. Industrial Lands Specialist reviews for sufficiency (all fields are complete and required attachments are attached). The applicant will also need to detail the costs (Phase 1 environmental, archeological predetermination letter, title report, and wetland determination report are examples) expended to date to prepare the required documentation.
3. Industrial Lands Specialist reviews for sufficient funds to cover planning grant.
4. Industrial Lands Specialist completes and submit for approval a modified staff recommendation to management, copy the program and policy coordinator and regional staff.
5. If the grant is approved, contact a third party consultant and verify that they are interested in completing this work. If the grant is not approved, inform the applicant that the grant is not approved. Note, there are three consultants (Cardno, Dowl, and Maul Foster Alongi) that responded to the agency’s RFP for the associated work. The consultants are selected by rotating thru the list alphabetically and on the firm’s availability.
6. Industrial Lands Specialist drafts and executes a contract with the third party reviewer.
7. Industrial Lands Specialist sends the municipality a communication with the name of the 3rd party consultant, what to expect, and OBDD contact.
8. Industrial Lands Specialist sends the consultant the Commitment for Certification form and packet.
9. The consultant reviews packet, prepares and provides final report to Business Oregon along with an invoice.
10. Industrial Lands Specialist processes the invoice for disbursement for the consultant’s completed work.
11. Industrial Lands Specialist sends the final report to the municipality and updates Salesforce.