



Equitable Housing Development Strategy Work Plan

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GOAL: Promote equitable housing opportunities that support vibrant communities across the region.

METRO ROLE: Establish partnerships with local jurisdictions, affordable housing developers and funders to support policies and programs that promote equitable housing opportunities across the region.

PROGRAM OBJECTIVES:

- Investigate and document statewide and national best practices regarding local, regional, and state policies and financing approaches.
- Investigate and document capacity (policies, expertise, resources) of local jurisdictions and Metro to support and promote equitable housing development.
- Develop shared understanding among jurisdictions and other stakeholders regarding best practices, needs, and opportunities for collaboration.
- Establish mechanism for formal partnerships between Metro and jurisdictions to support implementation of best practices for equitable development.
- Establish mechanism for formal partnerships between Metro, foundations, and other public and private funding sources to support equitable development in the region.



BACKGROUND:

Metro has a long history of commitment to equity, housing choice, and affordable housing. In 2000, Metro adopted Title 7 of the Urban Growth Management Functional Plan which requires local jurisdictions to support the preservation and development of affordable housing through their comprehensive plans and provides voluntary targets for affordable housing production. In 2006, Metro accepted the Regional Housing Choice Implementation Strategy which made four primary recommendations including:

- 1) Integrating housing supply concerns, particularly affordable housing, into all policy making and funding allocations in order to achieve regional housing choice equity through promotion of affordable housing as a regional function on par with transportation and green spaces.
- 2) Direct efforts towards development of resources, and especially a new permanent regional resource for affordable housing, and join and lead advocacy for increased funding at the Federal, State, and regional levels.
- 3) Promote strategies to remove regulatory barriers and reduce the cost of developing housing and affordable workforce housing specifically, especially in 2040 Centers and Corridors.

- 4) Prioritize the budget for housing to provide technical assistance to local governments such as land/site inventory, model codes, etc.

Metro's Transit Oriented Development Strategic Plan calls for staff to "work with stakeholders to develop a strategy around equitable TOD and identify funding needs and leveraging opportunities." To date, the TOD program has helped support the production of approximately 2,800 workforce housing units near transit, including 662 units reserved exclusively for households with incomes at 60% of Area Median Income or less.

In addition to Metro and local jurisdictional partners, the region is home to an experienced and knowledgeable community of for profit and not for profit affordable housing developers, Low Income Housing Tax credit equity syndicators, lenders, property managers, and advocates. Since 2003, the Oregon Housing Alliance has convened members of the broader affordable housing community including jurisdictions and strategic partners to develop and promote statewide legislative support for affordable housing.

While some of the recommendations of the 2006 Regional Housing Choice Implementation Strategy have been successfully implemented, other components of the Strategy have not moved forward, and housing affordability continues to be a significant regional concern. Recognizing this continuing need to address the issue of housing affordability, Metro Councilor Sam Chase proposed and Metro Council has approved a FY 2014-2015 budget amendment of \$200,000 to: 1) develop and deploy technical support tools for jurisdictions seeking to eliminate barriers to affordable housing; 2) develop and promote local, regional, and statewide policies to support affordable housing; and 3) develop a long range strategy for funding workforce housing development.

WORK PROGRAM ELEMENTS:

Phase 1. Building the Foundation (Fall 2014- Spring 2015)

Partnership

Lead: *Community Based Organization*

- Convene Equitable Housing Working Group of public, private, and community partners to help identify short and long term opportunities for equitable housing development
- Engage local government, housing developers, funders, and other partners to identify opportunities and barriers to equitable housing development
- Highlight local best practices and case studies that demonstrate equitable housing development in Local Best Practices Assessment

Analysis

Lead: *Metro Staff*

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- Build an analytical and technical foundation that connects with community based efforts to identify short and long term opportunities for equitable housing development.
- Produce Progress and Lessons Learned Assessment: Engage internal and external stakeholders to review and reflect on status of action from 2006 Regional Housing Choice Implementation Strategy to help focus current efforts on areas of consensus and opportunity.
- Produce Affordability Assessment: Analyze Urban Growth Report, other datasets, and nationally available housing research to focus on financial and economic barriers to housing affordability.
- Produce National Best Practices Assessment: Review policy and financial tools that have been utilized successfully to promote the development of economically diverse housing alternatives across neighborhoods and jurisdictions.

Consensus (Spring 2015)

Lead: *Working Group*

- Convene an Equitable Housing Development Summit consisting of local jurisdictions' elected officials, market rate and affordable housing developers, land preservation interests, and elected Metro officials at which research findings are presented. Present research findings regarding best local practices, regional policy opportunities, and financial partnership models. Achieve consensus on next steps to move forward to accomplish recommendations.

Phase 2. Activating Opportunities (Summer 2015- Winter 2016)

Technical Assisatnce

Lead: *Community Based Organization*

- Utilize Equitable Housing Workgroup to assist with implementation of recommendations from Phase 1

Matching Grants

Lead: *Metro Staff*

- Establish Equitable Housing Challenge Grant program to provide small grants to local government and community based partners who need resources to assist their efforts to implement equitable housing.

Financial Strategy

Lead: *Working Group*

- Provide recommendation regarding establishment of regional equitable housing funding collaborative that reflects the technical and community efforts from Phase 1.

Phase 3: Moving Forward (Winter 2016-Spring 2016)

- Based on work from Phase 1 and Phase 2, Metro Council will consider how to move forward at the completion of two-year pilot effort.

RELATED PROJECTS/PROGRAMS:

- Transit Oriented Development Program
- RISE initiative
- Regional coordination for local economic opportunity analysis and comprehensive plan updates
- Housing and Equity Opportunity Mapping
- Community Development and Planning Grants
- Powell-Division Transit and Land Use Planning
- Metro Equity Initiative
- Urban Growth Report

COUNCIL ROLE: (TBD liaison)

- Chair Equitable Development Summit.
- Serve as liaison to Council on policy recommendations.

RESOURCES CURRENTLY ALLOCATED BY PLANNING AND DEVELOPMENT FY 2014-2015

\$200,000 with 50% allocated for Phase I research and 50% for work associated with Phase III and implementation.

In addition, Planning and Development Department will allocate 1.0 FTE through a limited duration position to lead Metro's portion of the work effort.

Note: does not include staff in other departments