

Date: October 20, 2016
To: President Tom Hughes, Metro Council
From: Martha Bennett, Chief Operating Officer
Subject: 2016-17 Equitable Housing Planning and Development Grants

I am pleased to present my recommendations for the 2016-17 Equitable Housing Planning and Development Grants, a subset of the Community Planning and Development Grant (CPDG) program. Since the Metro Council established the CPDG program with funding from the construction excise tax, it has helped many communities turn potential into vision and vision into action for local and regional plans and policies.

This past spring, after learning that construction excise tax revenue was projected to exceed the grant amounts awarded during Cycle 4 of the CPDG program, the Council instructed staff to develop an Equitable Housing Grant program to help communities undertake planning efforts that will facilitate the creation of equitable housing—defined as *diverse, quality, physically accessible, affordable housing choices with access to opportunities, services and amenities*.

Staff held a pre-application meeting in May; in June, we received eight letters of interest from seven jurisdictions regarding potential projects. Staff provided feedback on letters of interest, and jurisdictions submitted full applications in August.

In July, I appointed a seven-member Grants Screening Committee with varied expertise and backgrounds in the private, nonprofit and public sectors. The Committee reviewed the eight applications submitted by seven jurisdictions, and I asked them to develop recommendations for two funding scenarios: \$500,000 (the amount initially discussed by the Council during the decision to create the program) and \$575,000 (the initial amount plus \$75,000 from the Cycle 4 CPDG grant that was awarded to Multnomah County but that did not move forward because the County returned the funds). The Committee submitted its recommendations to me on October 13, 2016, recommending that seven of the eight proposed projects be fully or partially funded under both the \$500,000 and the \$575,000 scenarios.

The Committee's recommendations are outlined in [Attachment A](#). In accordance with the Committee's recommendations, and to ensure that reduced funding levels do not compromise projects, I recommend total funding of \$575,000, consistent with the Committee's recommendations. Because the \$75,000 that was returned from Multnomah County was for a project dealing with equitable housing issues (barriers to shelter siting), it seems appropriate that this funding be re-allocated to another housing-related project. In addition to the Committee's recommendations, I have proposed some additional funding conditions (in addition to those put forth by the Screening Committee) for the approved projects; you will find these in [Attachment B](#). The full recommendations of the Committee are in [Attachment C](#).

All seven of the projects recommended by the committee for funding meet the requirements of the construction excise tax code and the administrative rules governing the CPDG program. The projects are diverse, ranging from those focused on eliminating barriers to development on specific sites to corridor-, district-, or jurisdiction-wide policy and strategy efforts. These projects will develop and produce policies and plans that will become the foundation for public, private and nonprofit investments in equitable housing. As the first round of CPDG grants specifically focused on housing equity, this portfolio of projects will also yield valuable insights and lessons to help inform future funding for similar work.

One project, the City of Portland's proposal for Terminal One, was not recommended for funding by the Committee. Given the legal and political challenges that exist with the site—including but not limited to its designation as a Metro Title 4 Regionally Significant Industrial Area (RSIA)—I agree with the Committee's recommendation not to invest these resources in a study for a proposal that appears to have feasibility barriers that are unlikely to be overcome. However, recognizing the tremendous challenge our region faces with regard to homelessness, I also recommend that Metro continue exploring ways to partner with the City of Portland, Multnomah County, and other jurisdictions to find policy solutions for addressing barriers to shelter siting and evaluating the viability of potential solutions, such as the Trail of Hope/Haven of Hope concept.

A binder containing the applications submitted by local governments will be delivered to you. After reading the applications, I believe you will share with me an appreciation for the high quality of local planning and development work in our region, and the creative approaches jurisdictions have developed to tackle equitable housing in a way that works for their communities. Please let me or Equitable Housing Initiative Project Manager Emily Lieb know if you have any questions.

Thank you.

Attachments

cc: Elissa Gertler, Planning and Development Department Director
Gerry Uba, CPDG project manager

**Attachment A: (COO Recommendations to Metro Council)
2016-2017 Equitable Housing Planning and Development Grants**

Projects Recommended for Funding

Project	Funding Request	Recommended Funding @ \$500,000	Recommended Funding @ \$575,000
Portland Equitable Housing Strategy for the Southwest Corridor	\$100,000	\$86,207	\$100,000
Tigard Southwest Corridor Affordable Housing Predevelopment Analysis	\$50,000	\$43,104	\$50,000
Beaverton Anti-Displacement Housing Strategy	\$100,000	\$86,207	\$100,000
Washington County Affordable Housing Site Evaluation, Barriers & Solutions	\$100,000	\$86,207	\$97,500
Oregon City Equitable Housing	\$100,936	\$86,207	\$100,000
Milwaukie Cottage Cluster Feasibility Analysis	\$65,000	\$56,035	\$65,000
Wilsonville Equitable Housing Strategic Plan	\$65,000	\$56,035	\$62,500
		\$500,001	\$575,000

Projects Recommended for No Funding

Portland Terminal One (Feasibility assessment of Terminal 1) \$100,000

Attachment B: COO recommended funding conditions in addition to Grants Screening Committee recommendations

Funding conditions recommended for all projects:

- *Engagement:* Within the negotiation of IGAs, it is important to distinguish outreach for site-specific elements of projects from outreach for policy projects. Outreach for site-specific projects or milestones should be focused on property owners (both of the site and its surroundings) and surrounding residents, as well as any development partners and potential target populations that would be served by a site. Outreach and engagement to inform broader policy outcomes should, on the other hand, be more expansive, and should also include specific efforts to reach underrepresented populations and communities of color.
- *Application of “equity lens”:* The screening committee recommended that each project should describe, as a condition for funding, how an equity lens will be applied throughout the project. I would like to propose some more specific guidance regarding equity in light of Metro’s recently adopted Equity Strategy—namely, that all grantees address the following question within their scope of work: *Do we have barriers in our current code that create impediments to housing for communities of color?* Jurisdictions may address this question in a way that makes sense for them. Metro staff will be available to provide technical assistance and, as available, research and data. In addition, grantee jurisdictions within Clackamas County may benefit from the County’s recent Fair Housing Assessment, which is the first assessment of its kind completed in our region under the new federal guidelines for Affirmatively Furthering Fair Housing.

Funding conditions recommended for specific projects:

- *Milwaukie / Cottage Cluster Feasibility Analysis:* The scope needs to be refined to ensure that the code audit happens before any site-specific feasibility analysis. The scope should include robust outreach to ensure that property owner support is secured prior to undertaking any site-specific work.
- *City of Portland / Equitable Housing Strategy for the Southwest Corridor:* The project should be closely coordinated with the recently awarded FTA TOD Grant for the Southwest Corridor Equitable Development Strategy.
- *Wilsonville / Equitable Housing Strategy:* The scope needs to be refined to be more specific and more targeted to reflect different market contexts in the Downtown and Frog Pond areas. The refined scope should lay out 3-5 specific policy strategies focused on multifamily infill development that will be explored for the Downtown area, and 3-5 specific policy strategies to be explored with the aim of increasing affordable homeownership options and “missing middle” housing in the Frog Pond area. Further, the City should commit to implementing a specific number of policies as an outcome of the grant.

Attachment C: Equitable Housing Grants Screening Committee Recommendations to COO

Date: October 13, 2016
To: Martha Bennett, Metro Chief Operating Officer
From: Alisa Pyszka and Leila Aman, Co-Chairs, Equitable Housing Planning and Development Grants Screening Committee
Subject: Equitable Housing Grants Screening Committee Recommendations

As co-chairs of the Equitable Housing Planning and Development Grants Screening Committee, we are pleased to present our recommendations for the 2016-17 Equitable Housing Planning and Development Grants awards.

Before we present the recommendations, we think it important to give you an overview of our committee's work. You appointed our committee in July 2016. Our discussions were guided by the overarching direction in the Administrative Rules for the Construction Excise Tax Funding for Community Planning and Development Grants (CPDG), which includes the Equitable Housing Grants program. Additional guidance for the committee was provided in the Equitable Housing Grants Application Handbook, including:

- the program's goal to fund projects that will remove barriers to equitable housing development
- planning activities supported by the grant
- criteria for evaluating the applications

Our committee met two times between September and October to review the eight applications submitted by seven local governments. Staff had previously reviewed and provided feedback on letters of interest.

We were impressed with the diversity of proposals and with the range of communities that applied, and we believe this round of grants will yield important lessons for how the region responds to the current housing crisis. Some of the proposed projects will support planning activities focused on eliminating barriers to development on a specific site, leading to formal development commitments and development agreements that will result in near term on-the-ground development. Others focus on policy development and strategic planning that will eventually lead to development.

The diverse backgrounds of the committee members created very lively and thorough discussions of the strengths and weaknesses of each of the applications. Although we did not come to consensus in every case, committee members generally agreed about which projects should be recommended for funding, and how much.

Attachment C: Equitable Housing Grants Screening Committee Recommendations to COO

Funding Recommendations:

The total funding requested for the eight projects was \$680,936. Staff advised the committee that Metro Council had previously discussed making \$500,000 available for the project, but that the COO also planned to recommend allocating an additional \$75,000 in funding from an approved Cycle 4 Community Planning and Development Grant (CPDG) project that did not move forward to the funding allocation for the Equitable Housing Grants 2016-17 allocation. For that reason, the committee developed two sets of recommendations: one for a \$500,000 total funding package, and one for a \$575,000 total funding package, summarized below.

Our committee recommends funding for all but one of the projects: the City of Portland’s Terminal One proposal. In order to develop recommendations for a \$500,000 funding recommendation package, the committee recommended an across-the-board 13.8% cut to the seven projects recommended for funding. This approach reflects the importance and the merit of the all the projects that were recommended for funding. For the \$575,000 funding recommendations package, the committee recommended slight cuts to two of the projects: Washington County and Wilsonville.

Summary of Funding Requests and Recommendations for \$500,000 and \$575,000 Funding Scenarios

Project	Funding Request	Rec'd Funding @ \$500,000	Rec'd Funding @ \$575,000
Beaverton Anti-Displacement Housing Strategy	\$100,000	\$86,207	\$100,000
Milwaukie Cottage Cluster Feasibility Analysis	\$65,000	\$56,035	\$65,000
Oregon City Equitable Housing	\$100,936	\$86,207	\$100,000
Portland Terminal One	\$100,000	\$0	\$0
Portland Equitable Housing Strategy for the Southwest Corridor	\$100,000	\$86,207	\$100,000
Tigard Southwest Corridor Affordable Housing Predevelopment Analysis	\$50,000	\$43,104	\$50,000
Washington County Affordable Housing Site Evaluation, Barriers & Solutions	\$100,000	\$86,207	\$97,500
Wilsonville Equitable Housing Strategic Plan	\$65,000	\$56,035	\$62,500
	\$680,936	\$500,001	\$575,000

Committee members expressed mixed reactions to the Terminal One proposal. Some committee members felt the project had strong merits. Although individual committee members did not agree on all of the merits and weaknesses of the Terminal One proposal, the committee did reach consensus on the recommendation not to recommend funding for this project, given that it ranked the lowest in the committee’s evaluation, and given staff direction regarding maximum available resources for the grant program.

Appendix contains a summary of committee comments, including positive comments, concerns, and suggestions for how applicants should adjust their scope of work in order to realize the intended outcomes of their projects. Not all committee members agreed with each of the positive comments or

Attachment C: Equitable Housing Grants Screening Committee Recommendations to COO

concerns in the summary, and in a few cases, comments may reflect an individual committee member's perspective.

Additional Comments and Suggestions for Future Funding Cycles

Our Committee also recommends the following actions to improve the Equitable Housing Grants program for future funding allocations:

- **Site specific proposals should have potential for impact that is much broader than simply achieving development on a single site.** For example, site-specific projects could be used to identify broader policy or administrative changes that could help to eliminate barriers to development; they could be catalytic in supporting overall goals for achieving the region's 2040 vision; or they could be significant in that they are addressing a critical need, such as affordable housing development.
- **Although the program is focused on "equitable housing," the application requirements and evaluation criteria could provide more specificity about the definition of "equity" in this context, and could elevate the focus on equity within the evaluation criteria.** The current description of "equity" within the evaluation criteria, as described in the Equitable Housing Grant Application Handbook, states that "Equity exists relative to the benefits and burdens of growth and change to the region's communities, and the proposed project will facilitate investments that address the needs of underserved and underrepresented groups. Applicants are encouraged to think about how their project supports efforts to 'Affirmatively Furthering Fair Housing'." However, equity is listed only under the "regional significance" criteria as one of six desired outcomes. Metro should consider making equity a separate criterion and/or providing more guidance regarding how applicants should demonstrate the use of an equity lens both in evaluating the potential outcomes of the project and/or engagement components.
- **Metro's program should encourage local strategies focused on preserving existing affordable housing.** The preservation of existing affordable housing (both regulated and non-regulated) is widely recognized as an important strategy that needs to be expanded to address our region's housing needs. Preservation is generally more cost effective than new development, and if we aren't able to preserve existing affordable housing, many affordable housing experts believe we will never be able to "build" our way out of the affordable housing crisis. The City of Beaverton's Equitable Housing Grant proposal included (along with elements focused on eliminating barriers to new development of equitable housing) a component focused on exploring strategies for the preservation of "naturally occurring" or non-regulated affordable housing—something we saw as an innovative and regionally significant approach and therefore recommended for funding. Given that Metro code states that the construction excise tax should be used "to provide funding for regional and local planning that is required to make land ready for development after its inclusion in the Urban Growth Boundary," it may be helpful for Metro to consider whether this language is still relevant for achieving the original intent of the program. From our perspective, supporting the preservation of existing affordable housing is compatible with the overall goal of achieving the six desired outcomes for the 2040 Growth Vision adopted by Metro Council.

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- **The lessons learned from projects approved for funding through the 2016-17 Equitable Housing Grant program should be used to help provide more direction for future funding cycles.** The eight applications we reviewed represent a wide range of approaches, presenting an opportunity for learning about what kinds of approaches are most effective in yielding significant policy outcomes and on-the-ground development. One thing Metro could explore in future modifications of the program would be to develop a checklist of the different kinds of planning efforts (i.e., housing needs analysis, code audit, opportunity site inventory, funding/incentive analysis, etc.) local jurisdictions should undertake to identify problem statements and develop approaches to addressing them. Staff could also consider developing more prescriptive templates for effective scopes of work that would meet the funding criteria, as well as case study examples of successful projects based on the 2016-17 funding cycle. This could help eliminate some of the barriers smaller jurisdictions may face in completing the application process, which is fairly involved. Additionally, it would help ensure that the applications Metro receives encompass the kinds of activities necessary to achieve the desired outcomes of the program.
- **Require applicants to provide more specific information about deliverables and how they will be shared with Metro and other stakeholders across the region.**

We will be happy to join you in presenting all of these recommendations to the Metro Council on November 1 if you so desire.

On behalf of the members of our Equitable Housing Grants Screening Committee, we want to thank you for giving us the opportunity to participate in this process and assist Metro in funding projects that eliminate barriers to equitable housing development.

APPENDIX (Co-Chairs Aman and Pyszka Recommendations to COO)

**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR 2016-17 EQUITABLE HOUSING
GRANT APPLICATIONS**
Oct. 12, 2016

2016-17 EQUITABLE HOUSING PLANNING AND GRANT APPLICATIONS
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APPENDIX (Co-Chairs Aman and Pyszka memo to COO)

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October 12, 2016

Applicant/Project City of Beaverton / Anti Displacement Strategy	
Requested Grant \$100,000	Recommendation options: If \$575,000 in total funding: \$100,000 If \$500,000 in total funding: \$86,207
Total Project Cost \$116,832	Financial Match: n/a In-kind Match: \$16,832
Project Description	The City of Beaverton requests \$100,000 to create an Anti-Displacement Housing Strategy. The City will hire a consultant to work with the city to a) map all current unregulated affordable housing (below 80% AMI) and developable properties, and b) identify strategies the city and the housing partners can implement to preserve and/or develop new affordable housing going forward.
Project Location	City of Beaverton (citywide)
Partners	Community Housing Fund, Network for Oregon Affordable Housing (NOAH), Washington County Housing Authority

Positive Comments

- High regional significance due to potential to generate lessons learned; focus on preserving “naturally occurring” affordable housing is innovative
- Strong potential for partnerships with interested funders
- Strong commitment for action; city has already allocated funding for acquisition of “naturally occurring” affordable housing
- Explicit focus on anti-displacement reflects commitment to equity

Concerns

- Community engagement component is not as strong as other applications
- Some questions as to the project team’s capacity to manage the project; specific staff were not noted because the city was in the process of hiring for the project manager position

Conditions for Funding

- Verify planning staff capacity.
- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee (MTAC), peer jurisdiction staff, and other identified stakeholders.
- Scope of work should include how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).
- Clarify how equity lens will be applied to shape the project.

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Applicant/Project City of Milwaukie / Cottage Cluster Feasibility Analysis	
Requested Grant \$65,000	Recommendation options: If \$575,000 in total funding: \$65,000 If \$500,000 in total funding: \$56,035
Total Project Cost \$77,000	Financial Match: n/a In-kind Match: \$12,500
Project Description	The City of Milwaukie requests \$65,000 to conduct a feasibility analysis and preliminary site design work for four sites to examine their potential for a cottage cluster development that can provide equitable housing opportunities to a variety of groups identified by community partners, including affordable housing, workforce housing, senior housing, and special needs housing.
Project Location	Four sites located within the City of Milwaukie’s medium density residential zones (r-2, R-2.5, and R-3). Exact sites to be determined as part of the proposal.
Partners	Northwest Housing Alternatives, Providence Milwaukie Hospital, and Clackamas County Health, Housing and Human Services

Positive Comments

- Potential for regional significance given ability to generate lessons learned regarding cottage clusters
- Strong potential for partnerships

Concerns

- Code barriers to cottage clusters need to be addressed before development could move forward.
- The city notes in their application that their initial outreach was not successful in identifying any interested property owners.
- The scope is more narrow than some other projects.

Conditions for Funding

- City should confirm property owner interest before moving forward with a feasibility analysis on any site.
- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee, staff of other jurisdiction, and other identified stakeholders.
- Scope of work should include for how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).
- Clarify how equity lens will be applied to shape the project.

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Applicant/Project City of Oregon City / Equitable Housing	
Requested Grant \$100,936	Recommendation options: \$575,000 in total funding: \$100,000 \$500,000 in total funding: \$86,207
Total Project Cost \$124,650	Financial Match: n/a In-kind Match: \$23,714
Project Description	The City of Oregon City requests \$100,936 to work with a network of local partners to evaluate the process for constructing equitable housing and remove barriers to development as well as implement incentives to facilitate and encourage new equitable housing in Oregon City.
Project Location	The project area is city-wide, although emphasis will be placed on specific development areas and zones through the analysis of site background information and mapping.
Partners	Clackamas County Health, Housing and Human Services; Northwest Housing Alternatives, Citizens Involvement Committee, Main Street Oregon City, Oregon City Chamber of Commerce, Oregon City Business Alliance

Positive Comments

- Strong potential for leverage given other economic development initiatives underway in Oregon City.
- Good combination of breadth and specificity.
- Proposed project addresses a very real need to eliminate code barriers to development, so potential for tangible impact is high.

Concerns

- Description of equity components of the grant is vague.
- Proposed “partners” and public involvement plan consists mostly of technical advisors; not enough outreach to disadvantaged groups or collaboration with community-based organizations.
- Important to have clearly defined outcomes; unclear whether and how the proposed scope would lead to ongoing activity.

Conditions for Funding

- Clarify roles of partner organizations beyond serving in a technical advisory capacity.
- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee, staff of other jurisdiction, and other identified stakeholders.
- Scope of work should include how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).
- Clarify how equity lens will be applied to shape the project.

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- Specify income-based performance measures related to number of units envisioned to be created.

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Applicant/Project City of Portland / Terminal One	
Requested Grant \$100,000	Recommendation options: \$575,000 in total funding: \$0 \$500,000 in total funding: \$0
Total Project Cost \$265,000	Financial Match: n/a In-kind Match: \$165,000
Project Description	PHB requests \$100,000 for a feasibility assessment of Terminal 1 related to the proposed Oregon Trail of Hope concept, a multi-service center providing shelter, services, and housing for people experiencing homelessness. The 12-month project will fund a consultant to conduct analysis of the site and produce outcomes in phases of: Visioning, Feasibility Analysis, and Master Plan development.
Project Location	Terminal 1 (2400 NW Front Avenue, Portland, OR 97209) is 14.48 acres with a 96,000 sq. foot warehouse in downtown Portland on the Willamette River.
Partners	Joint Office of Homeless Services (Multnomah County), Oregon Trail of Hope (nonprofit)

Note: Individual committee members had very different opinions about this proposal. Many of the comments summarized below do not reflect a majority perspective, and some may reflect individual committee members' perspectives.

Positive Comments

- Homelessness is a region-wide issue, and Portland has taken on a disproportionate burden. There is potential for this concept to relieve pressure on other parts of the region by siting a shelter in a location with higher real estate values rather than in an area with lower income areas (e.g., East Portland).
- There is a huge shortage of shelter beds and the overall concept is worthy of studying.
- Project includes strong matching funds and partner support.
- The proposal is innovative in that it seeks to use an integrated, comprehensive approach, modeled on a national best practice.

Concerns

- Concerns about the legal and political viability of the site, due to recent state land use decisions clearly prohibiting use of industrial land for mass shelters and anticipated political challenges of a zoning change on the Terminal One site.
- Studying a homeless shelter does not fit with the grant program criteria or program goals.
- Concept could equate to “warehousing” approach; placing people on an industrial site that isn’t integrated into communities and neighborhoods.

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- Unclear how this proposal fits with Metro's role of shaping a long-term vision of integrated land use and transportation.

Conditions for Funding

- Funding not recommended

Additional Comments:

- The committee recommends that the applicant consider the following potential changes to the scope for future grant cycles:
 - Conduct a broader analysis of zoning barriers to shelter siting
 - Conduct a broader analysis of the proposed homeless campus concept, including criteria for identifying appropriate sites

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Applicant/Project City of Portland / Equitable Housing Strategy for the Southwest Corridor	
Requested Grant \$100,000	Recommendation options: \$575,000 in total funding: \$100,000 \$500,000 in total funding: \$86,207
Total Project Cost \$120,000	Financial Match: n/a In-kind Match: \$20,000
Project Description	The City of Portland requests \$100,000 to set a target for affordable housing preservation and production as part of the Southwest Corridor transit project, estimate potential funding sources and funding gap to meet targets and build a community coalition to support inclusion of affordable housing as part of Southwest Corridor transit investment.
Project Location	One-half mile buffer around Barbur Blvd from the Barbur/Naito South Portland District to downtown Tigard via the Tigard Triangle
Partners	City of Tigard will serve as primary project partner. Additional collaborators include: Community Housing Fund, Community Partners for Affordable Housing (CPAH), Organizing People/Activating Leaders (OPAL), and the Washington County Housing Authority

Positive Comments

- Creating an affordable housing strategy in advance of a major regional infrastructure investment is an innovative approach with the potential to generate valuable lessons for the rest of the region
- Strong regional significance, including inter-jurisdictional collaboration (partnership with Tigard)
- Strong public involvement and partnerships with nonprofits

Concerns

- Unclear from the proposal what income levels would be served by the project
- Unclear from the proposal what kinds of implementation tools and tangible outcomes are most likely

Conditions for Funding

- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee, staff of other jurisdiction, and other identified stakeholders.
- Scope of work should include how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).

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- Clarify how equity lens will be applied to shape the project.
- Specify income-based performance measures related to number of units envisioned to be created or preserved.

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Applicant/Project City of Tigard / SW Corridor Affordable Housing Predevelopment Project	
Requested Grant \$50,000	Recommendation options: \$575,000 in total funding: \$50,000 \$500,000 in total funding: \$43,104
Total Project Cost \$73,080	Financial Match: n/a In-kind Match: \$23,080
Project Description	The City of Tigard requests \$50,000 for the SW Corridor Affordable Housing Predevelopment project, which will mitigate the effects of potential market displacement of affordable housing residents in Tigard’s Town Center by: identifying opportunity sites for housing relocation and preservation; developing a funding analysis to support an anti-displacement strategy; and engaging with affordable housing residents on equitable solutions.
Project Location	Tigard Town Center (Downtown Tigard and Tigard Triangle)
Partners	Community Partners for Affordable Housing (CPAH), 1,000 Friends of Oregon, Community Housing Fund, Unite Oregon, City of Portland

Positive Comments

- Creating an affordable housing strategy in advance of a major regional infrastructure investment is an innovative approach with the potential to generate valuable lessons for the rest of the region
- Strong regional significance, including inter-jurisdictional collaboration (partnership with Portland)
- Strong nonprofit partners

Concerns

- Unclear from the proposal what income levels would be served by the project

Conditions for Funding

- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee, staff of other jurisdiction, and other identified stakeholders.
- Scope of work should include how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).
- Performance measures should specify income-based performance measures related to number of units created or preserved.
- Clarify how equity lens will be applied to shape the project.

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Applicant/Project City of Wilsonville / Equitable Housing Strategic Plan	
Requested Grant \$65,000	Recommendation options: \$575,000 in total funding: \$63,500 \$500,000 in total funding: \$56,035
Total Project Cost \$76,235	Financial Match: n/a In-kind Match: \$11,235
Project Description	Wilsonville is proposing to research, develop, adopt, and begin implementation of an Equitable Housing Strategic Plan that identifies and prioritizes policies and programs for the City to implement that address current needs and gaps in Wilsonville's housing market.
Project Location	This project encompasses all of the City of Wilsonville with a special focus on the Frog Pond and Town Center areas.
Partners	n/a

Positive Comments

- High opportunity area with strong potential for regionally significant impact.

Concerns

- Some of the research components seem duplicative of Metro's Equitable Housing report, Metro's housing needs analysis, and the City's 2013 housing needs analysis.
- Value of the proposed housing summit and resource fair is unclear; engaging employers might be a more impactful approach.
- Description of equity components of the grant is vague; proposal indicates openness to different housing options, but they are not necessarily affordable.

Conditions for Funding

- Engagement strategy should specifically identify collaborators, including nonprofits and employers.
- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee, staff of other jurisdiction, and other identified stakeholders.
- Scope of work should include how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).
- Clarify how equity lens will be applied to shape the project.
- Clarify how market research will build on previous analyses, and how it will be targeted toward evaluating feasibility and impact of specific investment and policy tools.

APPENDIX (Co-Chairs Aman and Pyszka memo to COO)

COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR EQUITABLE HOUSING GRANTS

October 12, 2016

Applicant/Project Washington County / Equitable Housing Barriers and Solutions	
Requested Grant \$100,000	Recommendation options: \$575,000 in total funding: \$97,500 \$500,000 in total funding: \$86,207
Total Project Cost \$150,000	Financial Match: n/a In-kind Match: \$50,000
Project Description	Washington County requests \$100,000 to identify 3-5 potential affordable housing development (AHD) sites, evaluate AHD site suitability and key barriers through code and financial feasibility analysis, and then draft and evaluate potential solutions. It is expected to lead to community plan and/or code amendments, and pre-development work on at least one site.
Project Location	Potential affordable housing development sites within Washington County's Metro-designated Corridors, Centers, State Areas or Main Streets, including County-owned property at Cornell Road and Murray Boulevard.
Partners	Community Partners for Affordable Housing (selected developer for the County-owned Cornell-Murray property)

Positive Comments

- Strong partnerships with nonprofits
- Strong potential to link site-specific projects to more flexible regulations that eliminate barriers to equitable housing development

Concerns

- Proposed budget allocation for staff is higher than other applications
- Description of equity components of the grant is vague, and the proposal does not include a plan for how to reach out to disadvantaged populations.
- Only one of five sites is identified.
- Application does not describe the project team.
- Application does not provide examples of potential implementation strategies.

Conditions for Funding

- Clarify who serve on the project team.
- Clarify potential implementation strategies to be explored and how the scope will address them.
- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee, staff of other jurisdiction, and other identified stakeholders.
- Scope of work should include how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).
- Clarify how equity lens will be applied to shape the project.

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October 12, 2016

- Specify income-based performance measures related to number of units envisioned to be created or preserved.