

Housing Bond Progress Report for Gresham | 2021

The purpose of this report is to summarize local progress toward implementing local implementation strategies for the Affordable Housing Bond program. At the end of each calendar year, participating jurisdictions submit progress reports to Metro. Reports are reviewed by the Affordable Housing Bond Community Oversight Committee, which is charged with monitoring progress toward unit production and policy goals and ensuring alignment with guiding principles. Metro staff produce an annual report summarizing regional progress across all implementing jurisdictions.

SECTION 1: UNIT PRODUCTION AND FUNDING

This section is intended to provide a summary of projects and units in each jurisdiction's Affordable Housing Bond pipeline and Affordable Housing Bond funding commitments. With the passage of the Supportive Housing Services measure in 2020, many jurisdictions are seeking opportunities to expand unit production, deepen affordability, or increase the number of supportive housing units across the portfolio. With this in mind, we are also tracking plans to leverage SHS funding for rental assistance and/or services.

Describe progress toward implementing the development plan in your LIS. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following elements:

- a. *Results of competitive selections, including who was involved and how LIS criteria were applied and impacted the outcome.*

Gresham did not release a competitive selection in calendar year 2021.

- b. *Strategies/outcomes supporting efficient use of Metro bond funds and other sources of public funding in the project; including how projects are responding to increases in LIHTC equity or other additional funding to increase sustainability, durability, and livability for residents, or to reduce the amount of Metro bond subsidy*

Gresham has 194 units under construction in 2021, with an average bond subsidy of approximately \$84,000/unit. Efficient use of Metro bond funds was a criteria used in the 2020 solicitation, and investments were selected that made a good use of bond funds and leveraged other sources such as Section 811 PRA. Albertina Kerr has passed savings onto residents by covering utility costs for residents.

- c. *Summary of ongoing funding commitments for project-based rental assistance and ongoing supportive services not included within the project's resident services budget; including how Metro Supportive Housing Services (SHS) funding is being integrated or leveraged to support outcomes for serving very low income households and households experiencing or at risk of homelessness.*

With 77 units of 0-30% AMI under construction, Gresham has met the unit target for deeply affordable units.

- d. *Approach and anticipated timelines for achieving remaining unit production targets, including any priorities for remaining unit production targets. (e.g., location priorities, homeownership, supportive housing etc.)*

Gresham has exceeded the total unit target, and has 23 units of family-sized housing remaining with \$10.4M in funding. Gresham will be receiving further City Council input on priorities for a future solicitation. Priorities within Gresham’s LIS that have yet to be funded include rehabilitating existing, but not regulated, housing units as well as home ownership.

Figure 1. Production progress and resources committed

Project	Total Project Cost	Metro Bond Funds	Number of BOND ELIGIBLE units <i>(excludes manager units and non-eligible units)</i>				Plans to leverage Supportive Housing Services (SHS) funding <i>(yes/no/TBD)</i>		Status <i>Concept, final approval, construction, complete</i>	Construction start <i>(anticipated or actual)</i>	Completion
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units	For rental assistance	For wraparound services			
Albertina Kerr	\$45,238,678	\$11,200,000	147	30	31	30	No	TBD	In construction	Jan-2021	June-2022
Rockwood Village	\$65,942,261	\$5,152,030	47	47	39		no	TBD	In construction	Jan-2020	March-2022
Total committed or underway		\$16,325,030.00	194	77	70	30					
LIS commitment		\$26,756,995.00	187	77	93						
% of commitment complete		61%	104%	100%	75%						
Remaining for LIS		\$10,431,965	Exceeds goal	0	23						

SECTION 2: PROJECT HIGHLIGHTS

This section is intended to provide a brief overview of each project in the pipeline—and some of the noteworthy features.

Please provide a brief summary of each project in your portfolio, along with an image of the project. Be sure to describe:

- a. *Who the project intends to serve*
- b. *Project team and partnerships*
- c. *Funding sources leveraged*

- d. *Noteworthy features or highlights (e.g., community space, free wi-fi, accessibility features, childcare, climate resilience and sustainability)*
- e. *Anything else worth highlighting*

The responses to Section 2 are best summarized in the Metro fact sheets for the project (see attached).

SECTION 3: ADVANCING EQUITABLE OPPORTUNITY IN PLANNING AND CONSTRUCTION

In keeping with the guiding principle of leading with racial equity, local implementation strategies include commitments to advance racial equity through the planning and construction process, including goals for the amount of contract dollars (hard and soft costs) that will be paid to COBID-certified Minority, Women, and Emerging Small Business (MWESB) firms and strategies for encouraging inclusion of women and people of color in the workforce. Goals and tracking commitments for workforce diversity vary across jurisdictions and projects. Within three months of construction completion, each project will report on contracting outcomes and those tracking workforce diversity will report on workforce outcomes. This data will be included in future annual progress reports.

Describe progress toward implementing the equitable contracting and workforce strategies described in your LIS. Be sure to address the following elements:

- a. *Progress toward achieving the equitable contracting goals and strategies in your LIS*

Gresham's LIS stated that Project sponsors will be requested to achieve a target of 20% of total development costs for contracts to certified minority, women, and emerging small businesses pursuant to ORS 200.055. Both Albertina Kerr and Rockwood Village are on track to meet this goal, with Albertina Kerr currently projecting a total above 30%.

- b. *Progress toward advancing the workforce diversity goals and strategies in your LIS*

Gresham's LIS stated that Gresham is interested in encouraging participation in project workforce hours by minorities, women and disabled veterans. Gresham will work with Metro, other implementing jurisdictions, and with project sponsors to explore ways to maximize participation in project workforce hours. Albertina Kerr has been tracking workforce hours for women, minority, and apprenticeship hours. For the firms that were able to participate (11 firms total), the workforce utilization rates vastly exceeded the goals for minority hours works, are ~2/3 of the goal for women, and are at 75% of the goal for apprenticeship hours. Firms that did not participate were either under the \$250k contract amount, or had a prohibitive reason that were unable to participate.

- c. *If applicable, work complete or underway to expand local capacity to monitor and report on contracting and workforce outcomes*

Gresham's Bond program is closely coordinating with the City's Diversity, Equity, and Inclusion program, and working to develop city wide outcomes regarding procurement practices as well as COBID goals.

Figure 3. Equitable contracting goals and outcomes

Project name	Developer, General contractor	Contracting goals % of total contract amounts paid to...		Notes and preliminary progress
		Project goal (% hard costs)	Project goal (% soft costs)	
Albertina Kerr	Gerding Edlen/Pence	20%	20%	Currently projecting total of 32.15% of subcontractor COBID participation, with 27.01% MBE firms and 5.14% WBE firms.
Rockwood Village	CDP/LMC	20%	20%	Currently tracking a total of 20% with 6.% MBE and 14% WBE firms.

For projects that provided a minimum and maximum (or “stretch”) goal, please use the “minimum goal.”

Figure 4. Workforce diversity goals/outcomes (as applicable based on LIS and project)

Project name	Developer, General contractor	Workforce goals % of total labor hours* worked by...			Workforce tracking? Y/N	Prevailing wage BOLI, Davis Bacon, N/A	Notes and preliminary progress
		POC	Women	Apprentices			
Albertina Kerr	Gerding Edlen/Pence						
Rockwood Village	CDP/LMC						

For projects that provided a minimum and maximum (or “stretch”) goal, please use the “minimum goal.” Workforce tracking is recommended for contracts above \$250,000.

SECTION 4: ADVANCING EQUITABLE HOUSING OPPORTUNITY, ACCESS, AND STABILITY

The guiding principles for the Affordable Housing Bond Program include commitments to lead with racial equity and to create opportunity for those who have been left behind by the region’s housing market, especially communities of color, families with children and multiple generations, people living with disabilities, seniors, veterans, households experiencing or at risk of homelessness, and households at risk of displacement. Each local implementation strategy defines commitments and strategies to ensure affirmative marketing, low-barrier lease up practices, and culturally responsive programming—in addition to location priorities that affirmatively further fair housing and support community stability for those who have experienced displacement or risk of displacement. Once projects begin to lease up, data will be collected to report on marketing and lease up metrics and demographics of the initial resident population.

Describe progress toward implementing your LIS strategies for supporting fair housing access and community stability through project locations, affirmative marketing strategies, and lease up. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:

- a. *How locations of selected projects supported the location strategy described in your LIS, and any location priorities for future solicitations (feel free to include a map if you can)*

Gresham's LIS location strategy identified that the overall portfolio of sites should increase choice for residents on where to live. This includes:

- Providing new affordable housing in high opportunity neighborhoods and sites. This would include sites that have good access to educational, economic, recreational opportunities in addition to access to transit. Development proposals should demonstrate an analysis of these opportunities and community assets in relation to the project area by utilizing resources including the Opportunity Atlas or other tools.
- Increasing affordable housing in areas with existing underserved diverse populations, including areas with increasing housing cost. For investments in these areas, the project must demonstrate community development opportunities that will increase overall services in the neighborhood. Gresham will support development proposals by providing demographic and socioeconomic data.

Both Albertina Kerr and Rockwood Village are located in areas well-served by transit with a variety of services, including services located on the campuses of both investments. Both projects have light-rail stations within a half-mile. Both projects are adjacent to grocery. Albertina Kerr provided street improvements, including sidewalks and bike lanes to improve active transportation.

- b. *How projects are incorporating affirmative marketing strategies, partnerships for referral, and low-barrier lease-up*

Albertina Kerr will be using affirmative marketing practices to market the housing units to communities of color and persons with disabilities per the Affirmative Fair Housing Marketing Plan (AFHMP). Albertina Kerr will solicit feedback from referring and culturally specific organization to make desired low barrier screening criteria and leasing processes more responsive to our target populations, notably communities of color and those with disabilities. This additional feedback plan is outlined in the Community Engagement Plan in more detail. The project will include more direct outreach and marketing with referral organizations for both of its target populations prior to occupancy in order to ensure effective outreach and then successful lease-up. The management practices will include emphasis on low barriers to tenant access. Baseline low-barrier goals will be established for the following criteria, and evaluated as needed: lower income-to-rent requirements, identification requirements, lower application fees and deposits, and credit history requirements.

Rockwood Village marketing and leasing efforts have been centered around prospective residents and their needs, including providing low-barrier screening criteria focused around connections to local service organizations and multilingual resources. The marketing flyers for the property are available in seven different languages, based on the predominant languages of the existing Rockwood / Gresham community. Additionally, Property Management has been utilizing IRCO during leasing appointments with prospective residents as needed, and the Resident Services team with Hacienda has been available to assist residents with translations and the LIHTC paperwork process. The property website can be translated into 100+ languages and leasing forms are available in the online resident portal in just as many languages. In alignment with the AFHMP, several service organizations with clients in need of housing have received leasing information for the property including Hacienda (co-owner), NAYA, Urban League, Beyond Black, The Rosewood Initiative, APANO and IRCO.

c. Specific strategies for leasing permanent supportive housing units (e.g. coordinated referrals)

For Albertina Kerr, OHCS will be managing the waitlist for Section 811 PRA units and the development team is working with them and the process to ensure that interested applicants can be clearly directed to a Referral Agent or other qualified state/county or other service provider to help and certify the applications to OHCS.

d. Plans and partnerships to align culturally specific/responsive programming and services to meet the needs of tenants.

Albertina Kerr Workforce and Inclusive Housing provides a number of services to meet the needs of tenants. There will be two target populations for the building: 117 of these units be for those in the Direct Support Professionals workforce (DSP), including jobs such as nurse's aides, home health aides, and home-care aides, and 30 units will be for those with intellectual and developmental disabilities (I/DD). Additionally, the DSP target population is disproportionately people of color and women and are more likely to live in poverty and rely on public benefits, highlighting the need to help provide housing stability. Kerr will work with the Property Management company to carefully hire management staff with this cultural capacity and provide communications training where needed, notably to enable optimal communication with the residents with I/DD. If Kerr determines that there are areas of improvement, additional communications training and/or greater efforts in diversity outreach for staff hiring will be evaluated. Kerr's Programming efforts will aim to meet the social and supportive needs of the resident population via referral partnerships with local organizations, including culturally specific organizations. The plan to further identify additional needs of these populations beyond the outreach already conducted is outlined in the Community Engagement Plan provided to the City. The 30 units for those with I/DD will have integration with the State's K Plan which provides services to those living independently. With close partnerships, Kerr will increase the diversity of expertise and experience available to residents and allow for adaptation as resident needs and demographics change.

For Rockwood Village, Community Development Partners and Hacienda CDC are partnering with Hacienda Youth and Family Services to provide services at Rockwood 10. Hacienda has a proven track record of working closely with underserved populations and removing barriers to access housing, asset building opportunities, and educational opportunities.

Hacienda CDC employs a bilingual (English/Spanish) Resident Advocate who will work closely with property management staff and train them on assertive engagement with residents, trauma informed communication and culturally sensitive lease enforcement. The Resident Services Advocate will also conduct site visits with tenants and help identify their needs, which may include access to a food pantry, rental assistance, assistance with housekeeping or public/behavioral healthcare. Working with tenants to ensure successful tenancy, mitigate risk and prevent eviction is a large part of the Advocates' role.

Hacienda's emphasis on education for residents from birth through adulthood, coupled with asset building and entrepreneurial initiatives, is a proven model for success, providing critical support to low-income children and strengthening their family units for the long-term. Hacienda's core programs are Real Estate Development, Portland Mercado and Entrepreneurship, Youth and Family Services, Resident Services and Economic Opportunity.

Rockwood Village has collected a survey from the first residents that have moved in to obtain interest for future workshops. The project has also scheduled a series of workshops to introduce the Resident Services Coordinator and explain the range of services on site. The project has also hosted an internet assistance event with Arrobas Learning Center, applied to Energy Trust of Oregon to bring energy efficiency workshops, conducted a toy drive at the holidays with Hacienda's Expresiones program, and developed a move-in packet with a variety of services available through Hacienda and Multnomah County. Hacienda's Expresiones program is initiating STEM and art based programs for youth.

e. If you have projects that are beginning to lease up, please feel free to share any preliminary data on demographics.

For Rockwood Village, of the applicants that voluntarily provided race/ethnicity so far, 29% identified as white, 27% identified as Hispanic, 12% as African American, 10% Native American, 6% Asian, and 16% other.

Summary of project plans and partnerships for affirmative marketing and culturally responsive services

Project name	Who the project seeks to serve	Plans/partnerships for affirmative marketing	Plans/partnerships for responsive services
Rockwood Village	Residents earning below 30% AMI, families.	Several service organizations with clients in need of housing have received leasing information for the property including Hacienda (co-owner), NAYA, Urban League, Beyond Black, The Rosewood Initiative, APANO and IRCO.	Hacienda CDC will provide resident services programming, including through an on-site community building.
Albertina Kerr	The project will house direct support professionals (117 units) and adults with developmental and intellectual disabilities (30 units spread throughout the project to help prevent isolation).	Albertina Kerr will be using affirmative marketing practices to market the housing units to communities of color and persons with disabilities per the Affirmative Fair Housing Marketing Plan (AFHMP). Albertina Kerr will solicit feedback from referring and culturally specific organization to make desired low barrier screening criteria and leasing processes more responsive to target populations, notably communities of color and those with disabilities.	As the housing development is located on the site of Albertina Kerr’s campus, residents will be able to access services. Project is also partnering with Boys and Girls Club which has a site close by to offer a variety of family services.

SECTION 5: COMMUNITY ENGAGEMENT TO INFORM PROJECT OUTCOMES

In keeping with the Affordable Housing Bond Program include commitments to lead with racial equity, each local implementation strategy defines commitments and strategies for ensuring that people of color and members of other historically marginalized communities are engaged in shaping project outcomes. To ensure that we can measure these outcomes, Metro is encouraging and supporting jurisdictional and development partners in collecting and reporting on demographic outcomes for community engagement. While this data is not expected to be complete/thorough for each project, the goal is to expand best practices for tracking and reporting on demographic outcomes.

Describe your progress toward implementing your LIS strategies for ongoing community engagement. . Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to include the following:

- a. Briefly summarize community engagement activities used (WHAT YOU DID, e.g. “3 listening sessions, 1 survey,” etc.) and partnerships for community engagement—including completing below table.

Due to the ongoing challenges of COVID as well as staff capacity, community engagement for 2021 was limited. It included a virtual Diversity in Housing Forum, as well as a virtual Community Needs meeting. The Diversity in Housing Forum is available at: <https://www.youtube.com/watch?v=kaHb5BG5650>

- b. Summarize who participated in community engagement (WHO PARTICIPATED, e.g. 79 people participated in community engagement activities for Project X, of whom 92% had low incomes and 64% were people of color)—including completing below table.

Approximately 50 people participated in the two meetings, summarized below.

- c. Summarize major themes of feedback (WHAT YOU HEARD, e.g. “participants want more large units or garden space,” etc.)
- *Need to link housing to job opportunities*
 - *Housing that is affordable continues to be a significant challenge for residents*
 - *Concern from the community about displacement; project investments need to focus on people and stability*
- d. Describe themes in how feedback directly informed project implementation and outcomes (WHAT CHANGED, emphasis on feedback from communities of color and other marginalized groups)
- Themes will continue to inform a future solicitation, including the solicitation criteria.*

- e. Use table to show number of community-engagement partnerships with community-based organizations. Use narrative to briefly describe partnerships, and outreach strategies used to encourage participation and mitigate barriers.

Summary of community engagement partnerships

	Total community-based organizations	Culturally specific organizations	Faith-based organizations	Other community-based organizations (not culturally specific or faith based)
Number of partnerships	5	2		3

List of organizational partners		Hacienda CDC, National Association of Minority Contractors.		Habitat for Humanity, Community Alliance of Tenants, Human Solutions
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Summary of community engagement outcomes

Project or engagement event	Total participants	Were demographics tracked? (Y/N)	If yes, how many voluntarily reported demographics?	Of those reporting demographics...						
				<i>% people of color</i>	<i>% people with low incomes</i>	<i>% older adults (over 60)</i>	<i>% limited English proficiency</i>	<i>% immigrants and refugees</i>	<i>% existing tenants in building</i>	<i>% people who have experience homelessness</i>
Diversity in Housing Forum	~30	N								
Community Needs Meeting	~20	N								

SECTION 6: CLIMATE RESILIENCE AND SUSTAINABILITY

The historic heat wave experienced by the Pacific Northwest in June 2021 made it clear that climate change is not only a challenge for the future; it's here. How are your projects incorporating cooling strategies to keep people safe as temperatures increase and wildfires that impact air quality become more frequent? More broadly, how is your jurisdiction working with affordable housing developers to support climate resilience and climate smart building strategies? What challenges do you face and what opportunities do you see for regional coordination?

Both the Albertina Kerr and Rockwood Village investments have submitted cooling plans to Metro. These include cooling common areas and community rooms, and the ability for in-unit air conditioning which both projects are exploring additional funds from Metro to provide by the end of construction. Gresham has been working to understand best practices from developers within the city, including looking at cost-benefit financing models for different cooling approaches. Gresham is also tracking and supporting state legislative approaches to make cooling more widely available. It is clear that incorporating cooling plans with clear expectations and goals as early as possible in the development process is important. Regional coordination could include exploring best-practices in cost-benefit of various cooling solutions.