

Housing Bond Progress Report for Portland | 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.*
In early 2021, PHB selected four projects for contingent funding awards from the 2020 RFQ for Supportive Housing. Final awards were contingent on commitments of project financing by 12/31/21 and Metro Concept Endorsement. One project, the Hattie Redmond Apartments, received Final Approval from Metro in April 2021 and started construction of 60 Permanent Supportive Housing (PSH) units in October 2021.

Of the three other projects to receive a contingent funding award from the 2020 RFQ for Supportive Housing, two applied for additional Metro Bond funds through PHB’s Spring 2021 Metro Bond Opportunity Solicitation (M-BOS). Released in April 2021, the M-BOS included \$75 million in Metro Bonds, Project-Based rental assistance vouchers from Home Forward and Supportive Housing services funds from the Supportive Housing Services Measure from the Joint Office of Homeless Services (JOHS). The M-BOS prioritized proposals for housing focused on PSH and families and included one PHB-owned property and one Metro-owned property.

Twenty-three proposals responded to the M-BOS for the potential of 16 new projects for Metro Bond funding. These 16 projects requested \$189.5 million and represented 1,464 units of new affordable housing. As described in the LIS, PHB convened two committees to evaluate proposals. A Technical Review and Community Review committee evaluated how each proposal met the requirements and qualifications of the M-BOS and made a ranked recommendation for projects to receive an award to the PHB Director and Commissioner-in-Charge. Seven selected projects were announced in September 2021. All seven projects, totaling \$90.7 million and 687 units of affordable housing, received Concept Endorsement from Metro in November 2021.

In addition, two more Phase II projects have been identified for Metro Bond funding that align with Metro’s Regional Bond goals and Portland’s LIS. These additional projects will be submitted to Metro for Concept Endorsement and Final Approval by mid-2022. Taken together, these nine new projects combined with the four projects already approved by Metro equal 1,223 new units of affordable housing resulting in Portland’s achievement of 83% of its total unit production goal.

- 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*

As detailed in the City of Portland’s Metro Bond Local Implementation Strategy (LIS), in order to optimize the use of Metro bonds, PHB leveraged:

- **Capital from PHB and others:** All PHB Metro funded projects, except one, use Low Income Housing Tax Credit (LIHTC) and most use commercial debt. PHB was also able to leverage some of its Housing and Urban Development HOME, Construction Excise Tax (CET) and Tax Increment Financing (TIF) funds in a few projects. PHB has combined \$26.7M in its capital resources to pair with the Metro bond funds to deliver on the commitments made in the Metro bond.

In addition, several selected projects accessed Oregon Housing and Community Services (OHCS) support from Mental Health and Addiction Services funds, Local Innovation and Fast Track (LIFT) program, Permanent Supportive Housing (PSH) capital, Oregon Affordable Housing Tax Credits (OAHTC) as well as Metro Transit Oriented Development (TOD) and other grant funds. And two other projects were able to leverage Veterans Administration Supportive Housing (VASH) vouchers and three projects were able to access OHCS rental support and Oregon Health Administration (OHA) services funding for their PSH residents.

- **Attractive low-cost/no-cost sites:** The 2021 M-BOS offered two attractive sites, 74th & Glisan owned by Metro, and 5020 N Interstate, owned by PHB for development. Through these sites, PHB and Metro were able to shape the type of development and the affordability mix targeting specific locales where affordable housing was needed. Publicly owned and/or controlled sites are expected to continue in future solicitations to meet City-wide goals. In addition, site leverage proved to be innovative as developers worked to use sites from Trimet, PCC, churches and mission-driven owners, and their own existing sites for redevelopment.
- **Existing predevelopment pipeline:** Four projects, that had been awarded funding through earlier solicitations but had funding gaps, received additional Metro bonds in order to move forward. Through this process, PHB was able to quickly deliver units that meet the Metro Bond targets and achieve PSH units with deep affordability. These four projects will use 4.3% of PHB’s total Metro funds (or \$9.2 million) significantly less than the maximum 10% indicated in the LIS. In total, these four projects will produce 329 units, of which 134 are family-sized, 55 are 30% AMI, and 95 are PSH.

Similar to the Portland Housing Bond implementation, PHB sets maximum subsidy per unit in solicitations. As indicated in LIS, the Technical and Financial Feasibility Committee reviews all proposals including the pro forma to determine the

reasonableness of each proposal and the requested amount of PHB Metro bond subsidy. This information is shared with the Community Review Committee and the PHB Director. Once a project is awarded, the Metro bond subsidy may not be revised without meeting specific criteria and having provided detailed supplemental materials. PHB staff works with the developer(s) on all financing structure and on construction contracts, including review of add-backs and contingencies. Change in LIHTC generation due to the December 2020 fixing of the applicable rate to 4% for LIHTC has helped some projects offset the rapid increases in commodity prices during the last year, as a result, there has been no “excess” funds in any of PHB Metro awarded.

- 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.*

As part of the City of Portland’s Metro Bond Local Implementation Plan (LIP), the City has the goal of creating 300 new Supportive Housing (SH) units. This goal advances the City’s and Multnomah County’s shared goal of creating 2,000 new SH units from the adoption of resolutions in October 2017. As of September 30, 2021, there are 1,571 new units in Multnomah County that have opened or are in the development pipeline. Of this total, 472 units are open and 1,099 are in the pipeline. As a community, we are at 78% of our original goal.

Achieving and sustaining the Metro Bond SH units is dependent on securing non-Bond resources to pay for services and rent for households living in the units. PHB is closely coordinating with jurisdictional partners Multnomah County Joint Office of Homeless Services (JOHS) and Home Forward to effectively align and leverage SHS funds to create new SH units through the Housing Bond and sustain ongoing operation of those units. SHS funds are being invested to provide supportive services and rent assistance to fill identified operating and service funding gaps as modeled by Metro, PHB, JOHS and Home Forward.

At the close of 2021, we have made significant progress in creating new SH units. **PHB has awarded Metro Bond funds to seven projects that will deliver 262 new SH units for families and individuals experiencing chronic homelessness**, placing us at 87% of the 300 SH goal. These projects were selected through the following processes: Phase 2 pipeline projects (existing projects with City funds and small funding gaps), the Metro Bond Request for Qualification for Supportive Housing (Fall 2020) and the Metro Bond Opportunity Solicitation (Spring 2021). These projects have been approved by Metro’s concept endorsement process as outlined in the City and Metro’s IGA.

Of the 262 SH units that will be produced by the Metro Bond, **121 units will receive JOHS SHS Measure funding for services, at the budget of \$10,000 per unit per annum, for a total projected allocation of \$1,210,000 annually (with 3% escalation.)** For the remaining SH units not receiving JOHS SHS funds, Metro Bond funds are leveraging several other services and rent subsidy resources for SH, including OHCS/OHA PSH funds and Project Based Vouchers (PBVs) from Home Forward.

The new SH units are planned to come on-line within the next couple of years and will create needed supportive housing opportunities to respond to the urgent housing shortage for the following communities: homeless Veterans, BIPOC communities, families, seniors and persons living with severe mental illness and health conditions.

- 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.)*

PHB hopes to continue releasing solicitations for Metro Bond funds annually until all the production goals have been achieved. At the end of 2021, progress has been successful, as illustrated in the table below.

	Total Units	30% AMI Units	PSH Units	Family Sized Units
Metro Awards	1,105	435	237	499
Goals	1,475	605	300	737
Remaining to Achieve	370	170	63	238

After the two additional Phase II projects have received Metro Concept Endorsement and Final Approval (anticipated by mid-2022), PHB’s total progress will equal 1,223 new units of affordable housing representing 83% of its total unit production goal, 78% of its goal for 30% AMI units, 87% of its PSH goal and 79% of its goal for family-sized units. Meeting the remaining production goals will require PHB to prioritize 30% AMI and family-sized units in any future funding solicitations. Homeownership may not be prioritized but will remain an eligible option for project proposals. The timeline for the next

funding solicitation is likely to occur in the summer or fall of 2022 as alignment with OHCS funding also remains a priority for PHB.

Figure 1. Production progress and resources committed

Project	Total Project Cost	Metro Bond Funds (w/o PDF)	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	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	<i>Concept, final approval, construction, complete</i>	Month/Year	Month/year
Hattie Redmond	\$21,515,370	\$4,500,000	60	60	0	60	No	No	In construction	Oct-2021	Nov-2022
Dekum Court	\$78,919,528	\$21,034,083	147	61	75	0	TBD	TBD	Concept	Mar-2022	Jan-2025
Findley Commons	\$6,967,137	\$1,901,312	35	0	0	35	No	No	Complete	Oct-2020	Dec-2021
Waterleaf	\$77,957,828	\$1,700,000	176	17	48	20	No	No	In construction	Dec-2020	Jul-2022
74 th and Glisan	\$56,515,117	\$8,022,500	137	56	63	41	No	Yes	Concept	Dec-2022	June-2024
5020 N Interstate	\$30,176,395	\$9,152,000	64	18	48	0	No	No	Concept	Jun-2022	Jul-2023
Albina One	\$49,116,686	\$13,422,000	94	32	54	0	No	No	Concept	Mar-2023	Mar2025
Meridian Gardens	\$26,069,918	\$12,155,000	85	70	0	65	No	Yes	Concept	Jan-2023	Feb-2024
Hollywood Hub	\$98,790,115	\$28,428,483	199	69	129	0	No	No	Concept	June 2023	Jul 2025
PCC Killingsworth	\$38,039,446	\$2,481,000	84	28	60	0	No	No	Concept	Jun-2023	Aug-2024
Tistilal Village	\$28,406,356	\$3,432,000	24	24	22	16	No	No	Concept	Sep-2022	Dec-2023
Total committed or underway		\$106,248,378	1105	435	499	237					
LIS commitment		\$211,056,579	1475	605	737	300					
% of commitment complete		50.3%	74.9%	72%	68%	79%					
Remaining for LIS		\$104,808,201	370	170	238	63					

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*

**Except where updated below, project images have been submitted to Metro previously – see Concept Endorsement documents and Metro-drafted project profiles.*

1. Hattie Redmond Apartments

Home Forward and the Urban League of Portland will co-develop the Hattie Redmond Apartments for people of color experiencing chronic homelessness. The 60-unit project will also implement the City of Portland’s N/NE Preference Policy giving priority to displaced or longtime residents of north/northeast Portland. Other development team members include SERA Architects and Bremik Construction.

Urban League, an organization that serves and advocates for the African American community in Portland, will rely on its success with their Project HAVEN permanent supportive housing program and will integrate trauma-informed, culturally specific, and client-centered input into the building design, financing and programming. The on-site services team will include a resident services coordinator, case managers and peer support specialists. Project amenities include common rooms, a community kitchen facility, outdoor areas and other amenities that bring residents together.

The project leverages Metro bonds 5 times with additional funding from Oregon Housing and Community Services (LIHTC), Oregon Health Authority and deferred developer fees.

2. **Dekum Court**

The Dekum Court complex currently features 40 affordable apartments in NE Portland. Home Forward will redevelop the site, adding 147 newly affordable units for communities of color and low-income families. Project amenities include a Head Start, playground, laundry facilities and community rooms. Partners and development team members include Faubion Elementary School, LEVER Architects, and Walsh Construction.

The project leverages Metro bonds 3 times with additional funding from Oregon Housing and Community Services (LIHTC), other tax-exempt bonds, Home Forward equity and private funding.

3. **Findley Commons**

Findley Commons is a partnership between Do Good Multnomah, Home First Development and St. Mark's Lutheran Church. The development transformed a large and under-utilized church-owned parking lot into 35 quality, affordable and Permanent Supportive Housing (PSH) units for veterans who are homeless and those at risk of homelessness. Additional development team members and service partners include Doug Circosta, Architect; Beaudin Construction; and National Association of Black Veterans. Building amenities include owner-paid utilities, elevator, community area and service delivery spaces, a bike room, storage, energy-efficient appliances and fixtures, quartz countertops, luxury vinyl plank flooring and an outdoor patio and 34 parking spaces.

Metro bonds were leveraged 3.5 times with additional funding from Oregon Housing and Community Services, Meyer Memorial Trust, land donation and private funding.



4. **Waterleaf (fka, Riverplace Parcel 3, Phase 2)**

Waterleaf, the second building in a new development by BRIDGE Housing, will provide 178 affordable apartments, ranging from studios to three-bedrooms, directly adjacent to the Vera Apartments in the South Waterfront area of downtown Portland. Other development team members include Ankrom Moisan Architects and Walsh Construction. Impact NW will provide services to families and veterans with very low incomes, including supportive housing services for veterans and individuals experiencing homelessness. Amenities include laundry, conference room and community classroom, community room with kitchen, outdoor courtyard and playground. Car and bike parking are also included.

The project leveraged an additional \$78.5 million in capital funds from Oregon Housing and Community Services (LIHTC), Metro Transit-Oriented Development funds, Prosper Portland and private funding.

5. **74th & Glisan**

74th and Glisan will be co-developed and co-owned by Related NW, Catholic Charities and Immigrant and Refugee Community Organization (IRCO). Other development team members include Holst Architecture, LMC Construction, ALMAR Contracting, Quantum Residential, and We All Rise. The first building will have 41 units of permanent supportive housing (PSH) prioritizing Black, Indigenous and other people of color (BIPOC), seniors and survivors of domestic violence/sexual assault coming out of homelessness. The second building will provide 96 units of family housing with a mix of unit sizes, prioritizing BIPOC, immigrant and refugee households and intergenerational families.

On-site culturally specific services will be provided by IRCO and Catholic Charities. The project team is partnering with Mercy Corps NW to promote small business classes, offer two retail incubator spaces and a social impact café with a culinary and barista training program in the ground-floor commercial space. Amenities include a community room and kitchen, laundry room, multicultural reading room and book exchange, playground, picnic area, community garden, bike and car parking. The project is also proud to feature the first IRCO led multicultural preschool in Multnomah County.

The project leverages Metro bonds nearly 3 times with additional funding from Oregon Housing and Community Services (LIHTC), permanent debt, SDC waivers and deferred developer fees.

6. 5020 N. Interstate

5020 N. Interstate will be co-developed and co-owned by Community Development Partners (CDP) and Self Enhancement Inc (SEI). Other development team members include Carleton Hart Architecture, LMC Construction, ALMAR Contracting and Guardian Management and DRCOMM real estate brokerage. The project will serve families and give priority to displaced or longtime residents of north/northeast Portland, especially African American families by implementing the City of Portland's N/NE Preference Policy. Amenities include a community garden, outdoor play area and courtyard, bike storage, onsite parking and services. A neighborhood-serving commercial space will be located on the ground floor.

The project leverages Metro bonds 3.3 times with additional funding from Oregon Housing and Community Services (LIHTC), permanent debt, SDC waivers and deferred developer fees.

7. Albina One

Albina One is 94 new affordable homes in the Eliot neighborhood developed by Albina Vision Trust and Edlen & Co. The project will prioritize families, as well as displaced or longtime residents of north/northeast Portland under the City's N/NE Preference Policy. Portland Opportunities Industrialization Center + Rosemary Anderson High School will support residents with culturally specific education, mentoring, family support, employment training and career placement. Other development team members include LEVER Architects, Colas Construction and Quantum Residential. Amenities include community rooms on ground floor and top floor, onsite property management, secure bike parking, an outdoor plaza with garden and play areas, and 16 parking spaces.

Metro bonds will be leveraged 3.6 times with additional funding from Oregon Housing and Community Services (LIHTC), Weatherization funds, permanent debt, SDC waivers, deferred developer fees, and other grants and loans.

8. **Meridian Gardens**

Meridian Gardens expands Central City Concern’s supportive housing in East Portland, providing recovery-specific housing and services with a peer-delivered service approach for 85 new units. The project will provide single room occupancy and studio apartments to BIPOC individuals and couples experiencing or at risk of homelessness who are in substance use treatment or recovery. On-site culturally specific services will be provided by Puentes, the Imani Center and Flip the Script. Amenities will include common kitchens and community rooms, recovery group rooms, a supportive services office, resident gym and large outdoor courtyard. Other development team members include Ankrom Moisan Architects and Walsh Construction.

The project will leverage Metro bonds 2 times with additional funding from Oregon Housing and Community Services (LIHTC), permanent debt, and deferred developer fees.

9. **hollywood HUB**

hollywoodHUB will repurpose the Hollywood Transit Center into family-focused affordable housing for people of color and people with lower incomes. Developed and owned by BRIDGE Housing, the 13-story building will be the first project under TriMet’s transit-oriented development guidelines. In addition to TriMet, other development partners include Holst Architecture, O’Neill Walsh Community Builders, and Try Excellence LLC.

Amenities include a rooftop terrace, community room, meeting space, courtyard, bike and car parking, and on-site services by Hacienda CDC, Immigrant and Refugee Community Organization, Urban Gleaners and others.

The project will leverage Metro bonds 3.5 times with additional funding from Oregon Housing and Community Services (LIHTC), permanent debt, and deferred developer fees.

10. **PCC Killingsworth**

Home Forward will bring 84 new affordable homes apartments to the Cully neighborhood, co-located with a new Workforce Development Center operated by Portland Community College. The project will serve larger families and communities of color, including families and youth in the foster care system. On-site services will be provided by the Native American Youth and Family Center. Other development team members include Hacker Architects and O’Neill Walsh Community Builders.

Amenities include a family room, a community kitchen, community computers, large laundry room with healthy food vending machines, secure play spaces for kids of all ages, a bike storage room and easy transit access. Outdoor space includes a dining area, courtyard and an experiential playscape. Through the collaboration with PCC, the site will offer a large public plaza designed to support a farmer’s market and other community activities, a casual amphitheater, Wi-Fi access and parking.

The project will leverage Metro bonds 15 times with additional funding from Oregon Housing and Community Services (LIHTC), permanent debt, and deferred developer fees.

11. Tistilal Village

Tistilal Village is a redevelopment of an existing housing community by and for Native Americans and BIPOC families. The project will be development and owned by the Native American Youth and Family Center (NAYA) with supportive housing services provided by Native American Rehabilitation Association (NARA) for Native American families coming out of homelessness. Other development team members include Carleton Hart Architecture, Colas Construction, Housing Development Center, DDV Consulting Services and Viridian Management.

Interiors will emphasize trauma informed design approaches including ample sound buffering, clear and simple circulation patterns, plenty of meeting and community spaces, focus on safety at entryways, soothing color palette and direct lines of sight. Native American art will be prominently featured. Outdoor spaces include a play area, seating, community gardens and a plaza. Other amenities include easy bus access, grocery stores, health clinics, parks and a community center within walking distance.

Metro bond funds are leveraged 8 times with additional funding from Oregon Housing and Community Services (LIHTC and OAHTC), grants, SDC waivers and deferred developer fees.

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*
- b. Progress toward advancing the workforce diversity goals and strategies in your LIS*
- c. If applicable, work complete or underway to expand local capacity to monitor and report on contracting and workforce outcomes*

Only one project, Findley Commons, has completed construction in 2021. This project underachieved in meeting PHB's equitable contracting goals for hard costs by 5% and overachieved by 37% for soft costs. Some of these outcomes can be attributed to the scale of the project and the ability to attract bids, and an uncertified, but veteran owned, General Contractor. However, success is not always about meeting stated benchmark goals. Success, in this case, is about growing the capacity of new partners and expanding the pool of qualified contractors. Home First Development hired a project manager experienced in helping contractors become COBID certified who emphasized DMWESB participation and outreach resulting in a 57% professional services participation rate.

The other projects with construction underway are on track to meet or exceed PHB's equity in contracting goals despite COVID-related challenges that impacted outreach and bidding activities. These projects are also implementing partnerships with culturally specific and neighborhood-based organizations to increase the hiring of BIPOC and women in apprentice and journey-level workforce diversity programs. The goals and progress noted in Figure 4 below solely reflects percent of apprentice hours and participation by minorities and women. PHB also has workforce diversity goals for journey level hours at 22% of total hours worked by minorities and 6% of total hours worked by women.

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)	
Hattie Redmond (Baldwin)	Home Forward/Bremik	30%	20%	Preliminary progress at 38% DMWESB for hard costs and 29% DMWESB for soft costs.
Dekum Court	Home Forward/Walsh	28%	20%	Plan to increase hard cost goal from 28% to 30%
Findley Commons	Home First/Beaudin	24%	20%	Construction completion at 17.73% DMWESB for hard costs, 57% DMWESB soft costs
Waterleaf (Riverplace 2)	BRIDGE Housing/Walsh	30%	n/a	Project 50% complete. Currently at 21.85% DMWESB for hard costs. PHB was not tracking soft costs when project began 5 years ago.
74 th and Glisan	Related NW/LMC	30%	20%	
5020 N Interstate	Community Development Partners/LMC	30%	20%	
Albina One	Albina Vision Trust/COLAS	30%	20%	Developer aims to exceed PHB goals.
Meridian Gardens	Central City Concern/Walsh	30%	20%	
Hollywood Hub	BRIDGE Housing/Walsh	30%	20%	
PCC Killingsworth	Home Forward/Walsh	30%	20%	
Tistilal Village	HDC/COLAS	30%	20%	

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			
Hattie Redmond	Home Forward/Bremik	18%	9%	20%	Y	n/a	GC is working with Urban League on apprentice participation. Not many hours yet as project is not fully underway. Overall – 10.93%; Journey POC – 100%; Apprentice Women – 100%

Dekum Court	Home Forward/Walsh	20%	9%	20%	Y	Davis Bacon	goals for journey level hours same as apprentice hours
Findley Commons	Home First/Beaudin	22%	9%	20%	Y	Davis Bacon	Apprentice overall - 19.5%, Journey POC – 50.36% Journey Women- 0.57% Apprentice POC – 9.34%
Waterleaf (Riverplace 2)	BRIDGE Housing/Walsh	22%	9%	20%	Y	Davis Bacon/BOLI	Apprentice overall - 20.88% Journey POC – 48.97% Journey Women – 2.21% Apprentice POC – 25.95% Apprentice Women – 26.5%
74 th and Glisan	Related NW/LMC	22%	9%	20%		BOLI part / Davis Bacon	
5020 N Interstate	Community Development Partners/LMC	22%	9%	20%		BOLI	
Albina One	Albina Vision Trust/COLAS	22%	9%	20%		Davis Bacon/BOLI	
Meridian Gardens	Central City Concern/Walsh	22%	9%	20%		Davis Bacon	
Hollywood Hub	BRIDGE Housing/Walsh	22%	9%	20%		BOLI	
PCC Killingsworth	Home Forward/Walsh	22%	9%	20%		BOLI	
Tistilal Village	HDC/COLAS	22%	9%	20%		n/a	

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)*

Following the location priorities described in the Metro Bond Workplan and PHB’s LIS, project location criteria include projects located in areas of high opportunity and/or high risk of displacement, proximity to transit, services and resources, as well as geographic diversity to balance Metro Bond investments throughout each “region” of Portland. Project selection through past solicitations has resulted in projects throughout the city except in a Southwest Portland neighborhood (excluding the Central City area of downtown Portland). A future solicitation may include a property in Southwest Portland purchased by Metro in 2021.

Project sponsors select development locations based on both market opportunities and criteria that aligns with the sponsor organization’s mission or an identified community need. For example, the location for the Albina One project was selected for its strong ties to Black history and culture in Portland. The project is in lower Albina, the historic neighborhood for Black Portlanders that was home to the highest concentration of African American residents anywhere in the city or state of Oregon. It is adjacent to the Paramount Apartments, which was a safe hotel and apartment complex for Black people before and during segregation. The project will be in the original jazz district of Portland, wherein many Black creatives showcased their talent in what used to be a vibrant cultural center. Finally, it was the neighborhood that Portland’s early Black residents lived in for an easy, short commute to work at the nearby Amtrak train station, Kaiser shipyards or the garment district (which is now the Pearl). The neighborhood is steeped in Black history and culture.

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

To effectively reach the priority populations and to ensure equitable access to communities of color within the priority populations of each project, development teams will employ community-centered approaches for initial lease up and re-leasing efforts that begins with the partner service providers and local relationships. Project sponsors and service partners will also leverage their extensive client networks to whom they can appropriately market housing opportunities.

Following industry best practices and PHB policy, key elements of the tenant selection and screening criteria at each project will be tailored to ensure equitable access among applicants. The project specific screening criteria will be reviewed by PHB's Risk and Compliance team as part of their review of projects' Asset Management Plans to ensure that the screening criteria meets all required fair housing laws, works to advance racial equity, and does not directly or indirectly create disadvantages to the target populations. In addition, projects are expected to set clear and consistent policies to override the screening criteria for credit, rental, and criminal history reviews.

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

All projects with Permanent Supportive Housing (PSH) units and using supportive services operating support from the Joint Office of Homeless Services (JOHS) will be required to use Multnomah County's Coordinated Access system for referrals to lease PSH units. Additional referral processes may be used if required by another services funder and approved by JOHS.

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

An on-going requirement of PHB's funding solicitations and project selection criteria, all projects must describe and provide evidence of partnerships and/or internal programs to provide services that are culturally specific and responsive for the project's target populations. Most projects' programming and services target BIPOC communities and/or individuals experiencing homelessness or at risk of homelessness. Project teams include either external, culturally specific partners or plans to provide in-house culturally specific programs to residents onsite. For example, Central City Concern has several culturally specific and responsive in-house programs, such as Imani, Puentes and Flip the Script, that will be offered to residents at Meridian Gardens.

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

Not available for this reporting period.

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
Hattie Redmond Apts.	BIPOC, homeless singles/couples	Urban League of Portland, N/NE Preference Policy	Urban League of Portland
Dekum Court	BIPOC families		
Findley Commons	Veterans, homeless singles/couples	Do Good Multnomah, Dept. of Veterans Affairs, St. Mark's Lutheran Church	Do Good Multnomah, National Association of Black Veterans
Waterleaf	BIPOC, families, veterans, homeless	Dept. of Veterans Affairs, Latino Network, El Programa Hispano Catolico, Community Vision, Easterseals Oregon, Metropolitan Family Service	Impact NW, Latino Network, El Programa Hispano Católico, SEI, IRCO, NAYA, Iron Tribe, Bridges to Change, Transition Projects
74 th & Glisan	BIPOC, seniors, homeless, survivors of domestic violence or sexual assault, immigrant/refugee and intergenerational families	Catholic Charities and IRCO programs, Intercultural Counseling Center, Immigration Legal Services, Refugee and Migration Services, Housing Transitions Program	Catholic Charities and IRCO internal programs. Other partnerships TBD.
5020 N Interstate	African American families	Self Enhancement, Inc. programs and partnerships; N/NE Preference Policy	Self Enhancement, Inc. programs and partnerships
Albina One	African American and other BIPOC families, single fathers	POIC+RAHS, other local agencies; N/NE Preference Policy	POIC+RAHS, NxNW Health, The OHSU Avel Gordly Center for Healing, Prism Health, Black Parent Initiative
Meridian Gardens	BIPOC, homeless adults/couples in treatment or recovery program	Website, email and fliers. Outreach through partner agencies and Central City Concern's Housing and Employment Advisory Council, and Imani, Puentes, Substance Use Disorder Services (SUDS), and Flip the Script Programs.	Central City Imani, Puentes, SUDS, and Flip the Script Programs; LifeWorks, NARA, Northwest Pilot Project, Portland Rescue Mission, Salvation Army Adult Rehabilitation Center, Transition Projects, Inc.,
hollywoodHUB	BIPOC, immigrant/refugee families	Culturally specific media, Hacienda, IRCO, POIC, APANO, NAACP, Muslim Educational Trust, Self Enhancement, Inc., NW Pilot Project, Urban League, Hispanic Metropolitan Chamber, Asian Health & Service Center	Northeast Community Center, POIC, IRCO, Urban Gleaners
PCC Killingsworth	BIPOC families, youth aging out of foster care	NAYA, Living Cully, PCC Workforce Development Center	NAYA programs and services

Tistilal Village	BIPOC, Native American families, homeless	utilize targeted email distribution lists/channels, calling clients/potential residents, reach out to tribal partners and other BIPOC-led organizations and existing tenants	NAYA, NARA programs and services
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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.
- 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.
- c. Summarize major themes of feedback (WHAT YOU HEARD, e.g. “participants want more large units or garden space,” etc.)
- 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)
- 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.

Community engagement activities during 2021 included informational mailings to neighbors, property signage, a presentation at a neighborhood association meeting and focus groups with existing program participants and residents. The Hattie Redmond, for example, has been conducting focus groups with Urban League’s Project HAVEN residents who are primarily BIPOC formerly homeless individuals. Home Forward also contracted with Oregon Black Pioneers to lead a naming workgroup with Urban League staff and program participants that led to the selection of Hattie Redmond as the project’s namesake. By comparison, Dekum Court’s engagement focused on meetings with its Community Advisory Committee. This committee includes current residents, community partners and neighbors. Demographic information has not been shared for either project.

To date, feedback from engagement activities has informed project designs and implementation. Design changes for Hattie Redmond include utilizing a gabled roof to reflect the neighborhood’s residential character, increasing the building’s rear setbacks beyond the zoning code requirements to better separate the building from its neighbors, installing handrails, shower stalls and grab bars to increase accessibility for elderly and disabled residents, and incorporating an outdoor patio and roof deck to increase residents’ access to nature and opportunities for gathering together. In addition, Urban League staff and current residents expressed a desire for art that reflects them and their life experiences. Home Forward has hired an art consultant who is a person of color to facilitate regular art committee meetings. Feedback gathered for Dekum Court resulted in adding in-unit washer and dryer hookups in every apartment in addition to a common laundry room to better serve parents and persons with disabilities. Other changes to the project include a covered sport court adjacent to the community building and redesigned drive aisles and parking lot locations to promote better safety based on resident feedback.

Summary of community engagement partnerships

	Total community-based organizations	Culturally specific organizations	Faith-based organizations	Other community-based organizations <i>(not culturally specific or faith based)</i>
Number of partnerships	6	4	0	2
List of organizational partners		Hacienda, NAYA, Project HAVEN, Oregon Black Pioneers		Faubian School, Kenton Neighborhood Association

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...						
				% people of color	% people with low incomes	% older adults (over 60)	% limited English proficiency	% immigrants and refugees	% existing tenants in building	% people who have experience homelessness
Dekum Community	21	N								

Advisory Committee										
Kenton Neighborhood Association meeting	Not reported	N								
Project HAVEN focus groups	Not reported	N								
Hattie Redmond Naming workgroup	5	Y-limited info	Unknown	100%	100%					80%
Hattie Redmond groundbreaking	75	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?

In alignment with Metro’s policy on cooling strategies, PHB issued a new air conditioning requirement, effective August 13, 2021, in response to the extreme heat waves of the summer. The requirement asked affordable housing developers to propose an in-unit air conditioning strategy that best balanced the needs of their project and populations while ensuring the project’s efficient use of public resources. Acceptable cooling approaches include central air conditioning, packaged terminal air conditioners (PTACs), ducted or ductless condenser or heat pump units, window A/C units, portable A/C units, hybrid, geothermal, or other emerging technologies.

All of the 2021 MBOS awardees were expected to comply with the new cooling policies and requirements, and projects already under construction were encouraged to collaborate with PHB to identify opportunities for in-unit air conditioning cooling strategies within the existing financial parameters of the project. Projects that did not already include designs for in-unit air conditioning units (e.g. only A/C in corridors or window ports) submitted amended cooling proposals and cost estimates to adjust their designs, and

Metro recently announced an allocation of funds to ensure all MBOS projects can comply with PHB's cooling requirement. The most common approaches are two-fold: 1) single zone mini splits, or 2) dual port portable window unit. The most preferred approach from an energy, cost and environmental impact is the mini split; however, in cases where buildings are already designed and under construction, portable/window units may be the only viable cooling solution.

The most significant challenge for the projects is cost. Current budget estimates range from \$1,500 (dual port portable window unit) to \$10,000 (single-zone mini split) per unit. A related challenge is how to address cooling needs in rehab projects, especially for historic buildings with high-cost scopes of work (e.g. seismic upgrades) and/or where centralized cooling strategies may compromise the building envelope. PHB is currently working to refine our cooling requirements for rehab buildings.