TROUTDALE AFFORDABLE HOUSING DEVELOPMENT

Housing Bond Progress Report for Home Forward | 2022

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.*

   i. Home Forward is directly implementing the Metro bond funds, so competitive selection processes are not needed.

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

   ii. During 2022, the design process continued, including two more community advisory committee meetings and many public meetings. From September to December 2022, we participated in 7 public meetings with the Troutdale Planning Commission and/or City Council. Unfortunately, our land use application which requested a reduction in parking from the city's 2 spaces/unit requirement to approximately 1.5 spaces/unit failed. We also requested small design adjustments such as larger windows than allowed by code, which also failed. Based on advice from the Troutdale's Planning Director and Director of Public Works we requested a right of way vacation of an unimproved dead-end street, which would allow us to provide more parking. Unfortunately, this request was also denied. As we move past the land use process, we will continue to use Metro bond funds as efficiently as possible.

   iii. Initial construction cost estimates have been slowed due to the controversy with the City of Troutdale over parking ratios, a typically routine street vacation and minor adjustments to their development code.

   iv. Multnomah County and Home Forward entered into an intergovernmental agreement concerning the transfer of land for the purpose of affordable housing on the site previously owned by the County.

b. *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.*

   i. Home Forward plans to provide 25 project-based rental assistance vouchers through a pool of SHS funds it has to allocate. These units will serve people at risk of homelessness.

   ii. If additional funding for supportive services is needed, beyond what is already planned for resident services, we will work with the Joint Office of Homeless Services to request an allocation.

c. *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.)*

   i. On January 2, 2023, Home Forward submitted a new land use application that utilizes the new statewide regulations governing parking ratios for affordable housing. All associated variances and adjustments were removed from the application in order for the project to proceed as a Type II land use application, with potential approval granted at the staff level. Although neighbors may appeal a Type II staff decision to the Planning Commission, we do not anticipate they would take the case all the way to LUBA (Oregon's Land Use Board of Appeals). If the application were to be denied at Planning Commission again and then by the City Council, Home Forward will consider a LUBA appeal. Currently the project includes 85 units, leaving 26 units to meet Metro's production targets in East County. We will work with Metro to determine how best to meet the remaining target goals and related funding.

   ii. November 2023 - If the project does not face a LUBA challenge, the financial closing and the beginning of construction is anticipated late 2023 or early 2024.

   iii. May 2025 – Allows for typical 18-month construction period to be complete and the new development to be ready for occupancy.

Figure 1. Production progress and resources committed*

Project	Total Project Cost	Metro Bond Funds	Number of BOND ELIGIBLE units *(excludes manager units and non-eligible units)*					Plans to leverage Supportive Housing Services (SHS) funding *(yes/no/TBD)*		Status	Construction start *(anticipated or actual)*	Completion
			Total units	*30% AMI units*	*Family sized (2+ BRs)*	*PSH units*	*Number of occupants (as of Dec-2022)*	*For rental assistance*	*For wraparound services*	*Concept, final approval, construction, complete*	Month/ Year	Month/ year
Troutdale Project (East County)	$45,280,180	$13,925,892**	85	35	43	**0**				Concept Endorsement Approved	Nov 2023	May 2025
Total committed or underway		$13,925,892	85	35	43	**0**						
LIS commitment		**See note below**	**111**	**46**	**55**							
% of commitment complete		76.6%	76.6%	76%	78%							
Remaining for LIS		**$893,538**	**26**	**11**	**12**							

***HOME FORWARD'S DEKUM COURT PROJECT IS REFLECTED UNDER THE PORTLAND ALLOCATION AND COMMITMENTS, SINCE FUNDING FOR THIS PROJECT WAS PART OF THE FUNDING INITIALLY ALLOCATED TO CITY OF PORTLAND.**

**** THIS INCLUDES METRO'S LAND ACQUISITION FUNDING ALLOCATED TO EAST COUNTY. HOME FORWARD WAS ABLE TO NEGOTIATE THAT A COUNTY-OWNED PROPERTY BE TRANSFERRED TO HOME FORWARD AT NO COST, AS LONG AS IT IS USED AS AFFORDABLE HOUSING.**

85 UNITS TOTAL

- **11 STUDIOS**
- **31 1-BEDRM**
- **31 2-BEDRM**
- **12 3-BEDRM**

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*

   i. Low income residents, including seniors, people experiencing disabilities, and families with children

b. *Project team and partnerships*

   ii. Home Forward - developer, owner

   iii. MWA Architects

   iv. Bremik Construction

   v. Resident services partners not yet confirmed

c. *Noteworthy features or highlights (e.g., community space, free wi-fi, climate resilience and sustainability)*

   i. Buildings arranged in L-shapes with parking nearby to address Community Advisory Committee input regarding extreme weather and east winds.

   ii. Community room to accommodate classes and resident meetings that will include free-wi-fi access with a computer lab and a kitchen.

   iii. Current design utilizes mini-split heat pumps for heating and cooling in all units. Mini-split heat pumps are extremely energy efficient. In community spaces a combination of single-zone and multi-zone split system heat pumps will provide heating and cooling.

   iv. Heat recovery ventilators will supply fresh air and continuous ventilation to all units.

   v. Imagine Energy has been hired to look at including a photovoltaic system (solar panels) to the project to supply solar powered electrical energy.

vi. Two laundry rooms available to all residents

vii. Five fully accessible ADA units and six fully visitable units.

d. *Anything else worth highlighting*

i. A transportation and parking study was completed in an effort to negotiate lower parking ratios for the affordable housing development. The Troutdale code requires 2.0 parking spaces per unit. The land use application submitted on January 2, 2023, allows for a 1.47 spaces for every unit (including studios and 1's).

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*

i. Currently in the design phase of the project the MWA team has exceed the 28% COBID firm goal and have contracted with six COBID firms for a 30% participation rate. Bremik Construction has well established ties to diverse COBID subcontractors in the Metro area and is dedicated to meet or exceed the equity contracting goals of 30% participation.

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

i. As we move from the design phase into the contracting phase, Bremik Construction is committed to a robust outreach in order to create opportunities to increase workforce diversity. They have provided internships to low income high school students, participated in Women in Construction Career Fairs, and are currently working with Urban League to hire from their trade school graduates.

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

i. Home Forward's contracts and procurement department is an active participant in regional equity planning activities. An annual report for 2022 is underway and will be available upon request.

Figure 2. Equitable contracting goals and outcomes

Project name	Developer, General contractor	Actual/expected construction completion	Contracting goals *% of total contract amounts paid to…*		Contracting outcome % of total contract amounts paid to…	
			Project goal (% hard costs)	*Project goal (% soft costs)*	*Project goal (% hard costs)*	*Project goal (% soft costs)*
Troutdale Project (East County)	Home Forward/Bremik	May 2025	28%	20%		

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

Figure 3. Workforce diversity goals/outcomes (as applicable based on LIS and project)

Project name	Developer, General contractor	Actual/expected construction completion	Workforce tracking? Y/N	Prevailing wage *BOLI, Davis Bacon, N/A*	Workforce goals *% of total labor hours* worked by…*			Workforce outcomes *% of total labor hours* worked by…*		
					POC	*Women*	*Apprentices*	*POC*	*Women*	*Apprentices*
Troutdale Project (East County)	Home Forward/Bremik	May 2025	Y	Residential Davis Bacon	28%	9%	20%			

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

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)*
    i. The location is a short walking distance from Troutdale Elementary School, jobs, services and several bus stops. To ensure early and consistent communication, the Principal is participating in the project's Community Advisory Committee (CAC).
    ii. Bus access will be key to the success of the project. Metro's TOD staff were also invited to participate in the CAC.

b. *How projects are incorporating affirmative marketing strategies, partnerships for referral, and low-barrier lease-up*
    i. Not yet applicable

c. *Specific strategies for leasing permanent supportive housing units (e.g., coordinated referrals)*
    i. Not yet applicable

d. *Plans and partnerships to align culturally specific/responsive programming and services to meet the needs of tenants*
    i. Home Forward has a long standing relationship with El Programa Hispano, one of the few culturally appropriate service providers that works in Troutdale. We have started conversations with them about housing and service needs for future residents.
    ii. El Programa Hispano has helped us to design a project that serves their clients better by:
        - Participating in our architect and contractor selection process
        - Hosted a group of people with lived experience to participate in early interviews about housing and service needs and desires
        - Serving on our Community Advisory Committee
    iii. The project is planned for occupancy in May 2025. As we get closer we will work with service providers to create more concrete plans and partnerships to serve the residents of the Troutdale project.

e. *For projects that are currently leasing or have completed the initial leasing process, please share any preliminary information about affirmative marketing and fair housing outcomes, including demographics of residents relative to who the project seeks to serve*
    i. Not yet applicable

Figure 4. 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
Troutdale development	Low income residents, including seniors, people experiencing disabilities, and families with children	Not yet applicable	Planning will begin in 2024

Figure 5. Physical accessibility features

Project name	Number of ground floor units	Number of ADA (Type A) units	Universal design (Y/N)	Notes on other accessibility elements
Troutdale development	27	5	Y	

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.*
   i. Three focus groups with low income residents of East County (recruited by culturally specific partners) were held in August 2021 to inform the beginning of the work by the project Design Team.
   ii. A Community Advisory Committee has been established and two Zoom meetings were held in 2021. Two additional meetings were held prior to September 2022 when negotiations with the Planning Commission and City Council began.

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.*

i. Focus Group composition: Focus groups were 100% recruited from three priority population groups: Latinx; African American and Immigrants from Eastern Europe. Although the number of people in each household was not collected to compare to income to make a determination of "low income household", all have had experience living in affordable housing or homelessness.

ii. CAC composition: Home Forward has not yet sent a SurveyMonkey to CAC participants to ask for their self-identification. We anticipate gathering that information with the final CAC meeting in 2023. There are three primary stakeholder groups participating:

- Five people with a lived experience of housing instability in East County (three of whom are people of color)
- Four neighbors and nearby business owners
- Four community service providers and financing partners.

We have also had additional neighbors and Troutdale City Council members attend as guests.

c. *Summarize major themes of feedback (WHAT YOU HEARD, e.g., "participants want more large units or garden space," etc.)*

- Location of buildings on the site needs to better consider the east winds, snow, and ice common in Troutdale.
- Parking access needs to be closer to front doors both for weather concerns and juggling groceries and children from the vehicle to inside.
- Traffic and parking impacts on the surrounding neighborhood need to be considered.
- ADA units need to be located throughout the site and have easy access to the property management and community room
- Fourth Street (adjacent neighborhood street) needs clear access for public works vehicles (especially snowplows in the winter)
- Community gardens are a plus in the landscaping plan.
- Multimodal connections from the site to the greater neighborhood is important.
- Opportunities for older youth to hang out need consideration.

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)*

- Buildings were redesigned to form an L-shape to address the severe wind and winter conditions
- Parking lots were broken into three distinct areas for more direct access to front doors.

- A transportation and parking study was completed indicating no significant impacts on neighborhood streets and parking ratios in compliance with national traffic engineering standards.

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		3		
List of organizational partners		El Programma Hispano; Self Enhancement Inc; IRCO staff member		

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*
Hispanic Focus group	9	Y	5	100%		20%	60%	Did not ask	Not applicable	60%
African American Focus group	1	Y	1	100%	100%	0	0	Did not ask	Not applicable	0
Eastern European Immigrant Focus group	10	Y	7	All identified as white with one also identifying as Asian		14%	Only 28% reported speaking English at home; 100% reported speaking Russian	Recruited due to immigrant status	Not applicable	0

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? 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?

- Cooling systems: Current design utilizes mini-split heat pumps for heating and cooling in all units. Mini-split heat pumps are extremely energy efficient. In community spaces a combination of single-zone and multi-zone split system heat pumps will provide heating and cooling.

- Regional coordination: It's important to ensure that our tenants live in a healthy living environment with access to cooling – either in their unit or in common area spaces. It's also important to consider the impacts of new policies such as cooling requirements have on other funding requirements and building codes.
  - How does cooling intersect with energy, ventilation and sustainability requirements? For example, at one project it may be necessary to remove roof solar cells to make room for 206 mini-split A/C condensers on the roof.
  - Funding requirements are often in conflict with each other. How will requirements be prioritized among funders?
  - Typically, residents pay for electricity. How will the addition of A/C effect their electric bills? Will there be additional emergency utility funds to off-set the increase in utility costs associated with A/C? How will A/C, especially mobile A/C units, impact operating expenses, especially maintenance staff expense and storage requirements?