



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

# Agenda

Meeting: Housing Oversight Committee (Meeting 15)  
Date: Wednesday, Feb. 17, 2021  
Time: 9 a.m. to 12 p.m.  
Place: Virtual Zoom meeting  
Purpose: Begin annual review process with presentations from four jurisdictions.  
Outcome(s): Clarification and understanding of how jurisdictions are responding to committee considerations, identification of theme areas for small group discussion.

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9 a.m.	Welcome and Updates
9:10 a.m.	Public Comment
9:20 a.m.	Metro Audit Discussion: Part 2
9:45 a.m.	Annual Reports: Washington County
10:10 a.m.	Annual Reports: Clackamas County
10:35 a.m.	Break
10:40 a.m.	Annual Reports: Hillsboro
11:05 a.m.	Annual Reports: Beaverton
11:30 a.m.	Annual Reports Discussion
12:00 p.m.	Adjourn

# Meeting minutes

Meeting: Metro Housing Oversight Committee Meeting 15  
Date/time: Wednesday, February 3, 9 AM – 11:00 AM  
Place: Zoom Virtual Meeting  
Purpose: Welcome new members, prepare for annual review process and hear from Metro auditor.

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## **Attendees**

Melissa Erlbaum, Dr. Steven Holt, Mitch Hornecker, Mesha Jones, Jenny Lee, Ed McNamara, Steve Rudman, Bandana Shrestha, Nicole Stingham, Andrew Tull, Juan Ugarte Ahumada, Tia Vonil

## **Metro**

Patrick Dennis, Brian Evans, Ash Elverfeld, Elissa Gertler, Emily Lieb, Valeria McWilliams, Joel Morton, Nicole Pexton, Simone Rede

## **Facilitators**

Allison Brown, JLA Public Involvement

## **Minutes**

Hannah Mills, JLA Public Involvement

*Note: The meeting was recorded via Zoom and therefore details will be focused mainly on the discussion, with less detail in regards to the presentations.*

## **Welcome and Updates**

Allison Brown, facilitator with JLA Public Involvement, reviewed the agenda and purpose of the meeting. The chairs briefly welcomed the group noting the progress they have made and the time the members have committed to this effort.

The minutes from the last meeting were approved by the Committee.

## **Public Comment**

Allison opened the floor for public comment. No comments were submitted at this time.

## **New Member Welcome and Introductions**

Allison asked the Committee to introduce themselves for the new members, Nicole Stingham and Juan Ugarte Ahumada. The new members also introduced themselves explaining their background and interest in participating in the Housing Oversight Committee. Nicole highlighted her focus on permanent supportive housing and supporting alignment with the Oregon Housing Community Services Department's policy work. Juan expressed the desire to connect housing to healthcare and providing the best outcome for the community with the funding available in the Affordable Housing Bond.

## **Update on Progress and Expenditures**

# Meeting minutes

Using Powerpoint, Valeria McWilliams, Metro, began a presentation on the progress of the Housing Bond, specifically the predevelopment underway and the resources committed. In response to a committee member request, Valeria highlighted that according to current projections, the bond progress is ahead of schedule and that all jurisdictions appear to be on track to meet the requirements.

Patrick Dennis, Metro, shared the financial summary through December 2020. The Committee was given the opportunity to discuss the financial summary. Below is a summary of the conversation.

- Is 5% for administrative costs a cap for both Metro and the jurisdictions spending?
  - Metro staff responded: *This is a distribution of the total that can be spent from the Housing Bond.*
- How will the additional \$20 million in interest earnings be spent?
  - Metro staff responded: *That will be a Metro Council decision, to be informed by the Committee's findings and recommendations through the annual review process and beyond.*
- Is the unit production broken down by jurisdiction as well?
  - Metro staff responded: *The breakdown that includes jurisdictional unit production will be provided in the annual program report.*
- Does Metro have a budget for their administrative costs?
  - Metro staff responded: *Metro has an annual budget for administrative costs and will be working to develop a longer term administrative budget this year.*

Emily Lieb, Metro, continued the PowerPoint reviewing the updates to the Committee, including the impact from the December 21, 2020 federal economic relief bill in generating additional equity that will have a significant positive impact on the housing bond pipeline portfolio. Emily noted project approvals/disbursements for January that will be included in the next quarterly report. The Committee was given the opportunity to discuss. Below is a summary of the conversation.

- We should explore ways to keep excess funding. If there is excess funding it should be redistributed through the bond not given to the developer.
  - Metro staff responded: *Metro staff are working to develop clear guidelines to ensure a coordinated approach to ensuring that this additional federal funding can be leveraged to create additional units and other public benefits.*
  - A Committee member added that it would be beneficial for the community if the Committee reinforces the need to capitalize on the funding available.

## **Charter Clarification and Annual Review Process**

Allison transitioned the meeting to reviewing the plan for the Committee and welcomed Councilor Christine Lewis. Allison reviewed the discussions she had with committee members prior to the meeting, highlighting the common desire to center back on Committee's purpose. The Committee was asked to review the Committee Charter and a series of questions to help guide the discussion.

# Meeting minutes

Using PowerPoint, Joel Morton, Metro, reviewed the Committee Charter, including an update that staff will no longer share draft recommendations for project funding prior to approval. The Committee was given the opportunity to discuss and ask questions. The discussion is summarized below.

- How does Metro see this change improving operations and functionality?
  - Metro staff responded: *We've explored different options, including inviting Committee members to participate in staff conversations about projects and sending reports on projects out to Committee members requesting feedback via email. Staff found that participation was uneven, and also led to confusion about and potential conflict with the committee's primary role of providing accountability and oversight for programmatic progress and outcomes.*
- It's important that we determine the purpose of the Committee. Is this a committee that can influence and make decisions, or is this a rubber-stamp committee?
  - Metro staff responded: *The goal is that the Committee will focus mainly on developing the annual report for Metro Council. Staff anticipate significant and substantive areas for the Committee's work in this process to shape adjustments to implementation moving forward.*

Councilor Christine Lewis provided additional information about the Metro Council's intentions for the Committee, summarized below.

*You have been appointed to represent the constituencies that the Metro Council also represents. The annual report you produce will be critical in identifying our strengths and weaknesses at a programmatic level. Given the recent policy changes at the federal level, for example, we're asking you to consider how the program should adapt in response.*

The floor was opened for discussion, summarized below.

- There appears to be a shift in the role of the Committee. It's important that the Committee can be involved in decisions. With this structure it seems less effective, only allowing the Committee to weigh in on finalized decisions. We need to have the chance to ensure our voice in decisions that impact Black and Brown community members.
  - Metro staff responded: *The Committee charge has always been focused on providing programmatic oversight and accountability for outcomes; not advising on investment decisions. The annual review process will include an evaluation on the effectiveness of local progress toward engaging historically marginalized groups in shaping project outcomes to meet community needs.*

Allison presented the question of whether there was an opportunity for small group involvement in the decision-making process, as well as highlighting the potential for the Committee to correct the direction of implementation if necessary.

# Meeting minutes



## **Metro Auditor Report**

Using a PowerPoint, Brian Evans, Metro, walked through the results of the bond audit. Brian introduced his colleagues Simone Rede and Nicole Pexton. They presented the details of the audit which can be reviewed in the recording.

Allison noted that staff received a number of questions in the chat related to the Audit. Councilor Lewis volunteered to attend the next meeting to answer questions and share Metro Council reflections, and staff suggested that additional time be included at the top of the next agenda to further discuss the management response to the Audit.

## **Next steps**

The co-chairs thanked the Committee for their participation.

The next meeting will be February 17, 2021.

The meeting was adjourned.

# Metro Affordable Housing Bond Community Oversight Committee

## Recommendations and Considerations for Local Implementation

The Affordable Housing Bond Community Oversight Committee has identified the following considerations for all partnering jurisdictions for ongoing implementation and monitoring of outcomes. Following the considerations listed for all jurisdictions are additional considerations for two of the jurisdictional partners.

- Further define strategies and outcomes that will be measured to demonstrate the advancement of racial equity, including low-barrier screening criteria, affirmative marketing, universal design, voucher prioritization, wraparound services, and contract and workforce diversity.
- When describing strategies to advance racial equity, be specific about prioritization among various strategies.
- Expand the impact of the affordable housing bond program by seeking ways to achieve more than the minimum housing unit production targets.
- Work with your own jurisdiction and overlapping jurisdictions to identify local regulatory tools and financial incentives that could be implemented to support affordable housing. Example could include property tax abatements or exemptions, SDC and fee waivers, local construction excise tax, reduced parking requirements, etc.
- Use language that acknowledges intersectionality of populations; avoid differentiating between homelessness, disabling conditions including physical and mental health, and addiction.
- Identify screening criteria not relevant to likelihood of successful tenancy that should not be considered.
- Provide further information about jurisdiction commitments to fund supportive services as needed to meet the needs of certain tenants.
- Additional resources need to be identified to successfully serve tenants who need permanent supportive housing.
- Consider further specificity about family sized unit production that includes goals or requirements to ensure three bedroom and larger homes.
- Measuring outcomes regarding workforce equity should include all workers, not solely apprentices.
- Many minority owned businesses need additional support to successfully participate in the COBID certification program.
- Consider sustainability/durability and life cycle costs, and incorporate findings from the 2015 Meyer Memorial Trust study on cost efficiencies in affordable housing in evaluating project costs.

## **Washington County**

The Committee has identified the following additional considerations for the County's implementation:

- The County should provide further clarification regarding intentions for geographic distribution as part of project solicitations.
- The County should provide a plan and measurable outcomes that demonstrate progress toward reaching the 20% MWESB participation goal.

## **City of Portland**

The Committee has identified the following additional consideration for the City's implementation:

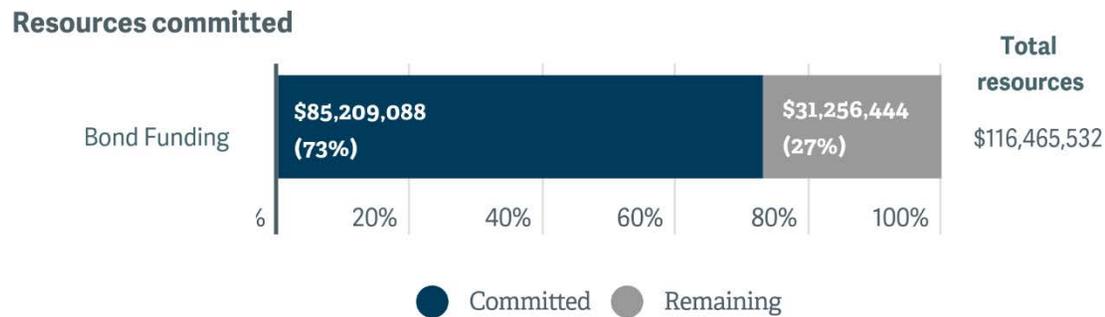
- The City should make a good faith effort to identify opportunities to accelerate the implementation timeline to commit funding to projects within the 5-7 year timeline committed to voters in 2018.

# Housing Bond Progress Report for Washington County | 2020

*The purpose of this report is to summarize Washington County’s progress toward implementing the strategies in its approved Local Implementation Strategy (LIS), for consideration by Metro’s Affordable Housing Bond Community Oversight Committee.*

## 1. PROJECTS UNDERWAY

As of the end of December 2020, Washington County had eight projects underway. Collectively, these projects represent 703 new affordable homes, or 87% of Washington County’s total production target for the Housing Bond, while using up approximately 73% of its allocated \$116,465,532 in funding.



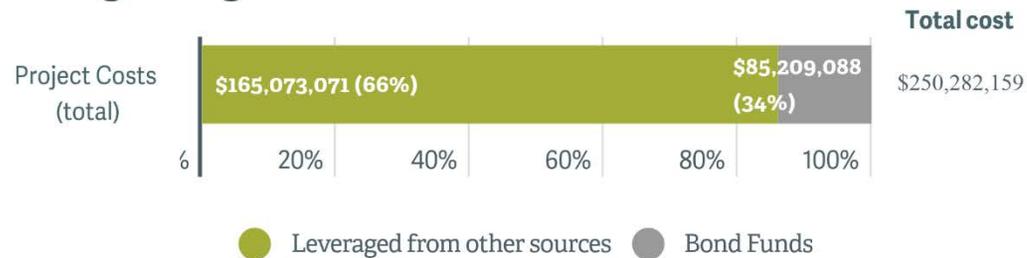
Of the homes created, 389 will have 2 or more bedrooms, representing 96% of its target for family-size homes; and 228 will be affordable to households with incomes at or below 30% of area median income (AMI), representing 68% of their Housing Bond target for deeply affordable homes.

**Table 1a: Summary of projects underway**

Project	Developer	Metro Bond Funds	Total Project Cost	Status	Anticipated ground-breaking date		Anticipated construction completion date	
				<i>concept, final, construction, completion</i>	Month	Year	Month	Year
Viewfinder	Community Development Partners	\$11,583,000	\$32,900,000	construction	Jun	2020	Oct	2021
Tigard Senior Housing	NHA	\$6,270,000	\$19,209,708	concept	Feb	2022	Mar	2023
Terrace Glen	Related Northwest	\$17,484,000	\$48,389,878	concept	Jan	2022	Jun	2023
South Cooper Mountain Development	BRIDGE	\$8,700,000	\$28,142,095	concept	Sept	2021	Nov	2022
Plaza Los Amigos	REACH	\$12,830,000	\$ 39,208,808	concept	Jan	2022	Jun	2023
Forest Grove Family Housing	DCM Communities	\$3,792,088	\$ 10,994,346	concept	Apr	2021	Apr	2022
Basalt Creek	CPAH	\$14,320,000	\$ 43,583,824	concept	Apr	2022	Mar	2023
Aloha Housing	BRIDGE	\$10,230,000	\$ 27,853,500	concept	Jan	2022	Mar	2023
Total committed or underway		<b>\$ 85,209,088</b>	<b>\$ 250,282,159</b>					
Total percentage committed or underway		<b>73%</b>						

*Shading indicates a Phase 1 project*

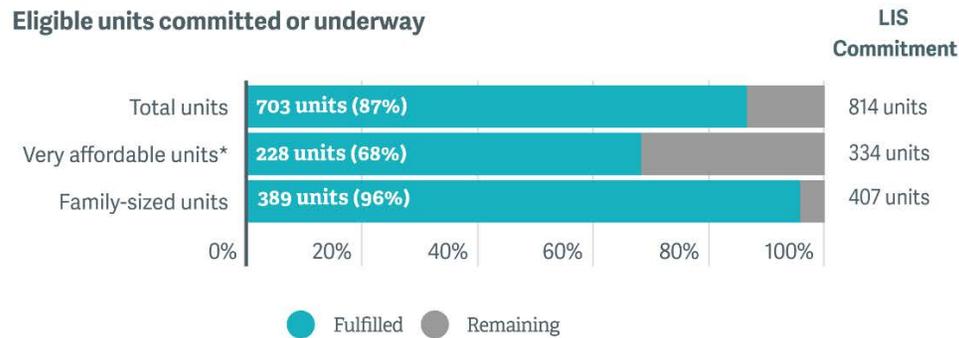
**Amount of funding leveraged from other sources**



**Table 1b: Unit production**

Tallies include **only** bond-eligible units; manager units or other non-bond funded units are not included in these counts.

Project	Total units	30% AMI units	2+ BR units	30% AMI and 2+ BR units	61-80% AMI units (should be no more than 10% of total units)	# of Project-based Vouchers
Viewfinder	81	34	56	20	0	8
Tigard Senior Housing	58	23	0	0	0	23
Terrace Glen	144	43	73	19	0	3
South Cooper Mountain Development	74	14	46	6	0	0
Plaza Los Amigos	113	26	73	4	0	16
Forest Grove Family Housing	36	8	30	4	0	8
Basalt Creek	116	47	60	21	0	8
Aloha Housing Development	81	33	51	2	0	0
<b>Total committed or underway</b>	<b>703</b>	<b>228</b>	<b>389</b>	<b>56</b>	<b>0</b>	<b>66</b>
LIS Commitment	814	334	407	N/A	N/A	124
% of commitment fulfilled	87%	68%	96%	N/A	N/A	53%
Remaining to achieve local targets	111	106	18	N/A	N/A	58



\*refers to households at 30% Area Median Income (AMI)

**Narrative 1: Referencing the data above, provide a narrative (appx. 750 words) describing progress toward implementing the development plan in your LIS. Feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you'd like to highlight. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. Description and results of competitive selections, including who was involved and how LIS criteria were applied and impacted the outcome.*
- b. Cost containment strategies.*
- c. Leveraged capital and ongoing operating funding.*
- d. Approach(es) to aligning resident or supportive services.*
- e. Plans, strategies and anticipated timelines for achieving remaining unit production targets (total, 30% AMI, 2+ bedrooms).*

In March a Notice of Funding Availability (NOFA) was released to developers to apply for Affordable Housing Bond funds in Washington County. Applications were due the end of May after a deadline extension due to COVID-19 at the request of developers. The County received seven applications requesting a total of \$71,476,088. The County completed an evaluation of applications as outlined in its LIS, resulting in a recommended slate of six projects for Concept Endorsement to the Washington County Board of Commissioners. In addition, the evaluation committee also recommended a project within the City of Beaverton for approval. This project is located in South Cooper Mountain, an area annexed from unincorporated Washington County into the City of Beaverton and currently adjacent to the County's Metro Bond implementation area. City of Beaverton staff competitively reviewed this project and requested Washington County fund the project as Beaverton is using its Metro Bond funds to produce four other affordable housing developments. While the project is located within the City of Beaverton, because it will be funded out of the County's Metro Bond allocation, it will count towards the County's unit production goals.

Evaluation of all projects included: staff threshold review, third party financial analysis, review against competitive scoring criteria, and input from the County's Housing Advisory Committee. Both Washington County Board of Commissioners and Metro provided Concept Endorsement to the seven projects in September. In addition to these seven projects, the County's Phase I project began construction in late June with virtual groundbreaking in July. Overall, these eight projects will provide 705 units of regulated affordable housing. Combined, the projects have been awarded \$85,509,088 in Metro Bond funds, which is leveraged at a rate of 2:1 with \$164,840,108 in leveraged funds and a total development cost of \$250,349,196. These projects will be supported with 74 Project Based Section 8 Vouchers (including 13 VASH Vouchers). It is challenging to balance cost containment on production of these units with meeting unit production goals for family-sized units, units for 30% MFI households, and PSH units. Meeting these unit production goals requires construction of more square footage, use of especially durable finishes, increased replacement reserves, and increased operating expenses – all of which increase total development cost. However, all project sponsors are experience developers of affordable housing and approach project design with a lens of efficiency.

Washington County's bond implementation area is a large one. Geographic dispersal of projects was an important component of evaluation – location in a high opportunity area where existing affordable housing is limited was a factor within the geographic dispersal component, as was proximity to transit. Two of the projects (191 total units) are in high opportunity areas. The other six projects are all located on a bus line, with two of those on a high-frequency line.

Five of the eight projects will have Permanent Supportive Housing (PSH) units – a total of 58 PSH units. Washington County identified in its LIS a goal of producing 100 PSH units so it has achieved over half of those units. While development of these PSH units are to be supported with Project Based Section 8 Vouchers, the services, are not funded by the Affordable Housing Bond or Project Based Vouchers. As the County develops an application process for the SHS funds and as the housing units are built and available for lease-up, it is likely that these project sponsors will apply for support services for PSH units at Affordable Housing Bond-funded projects. Resident services will be provided at all eight Metro Bond projects. All project sponsors are experienced in providing directly or partnering to provide these resident services.

Washington County's remaining unit production goals include: 110 units overall – 106 30% MFI units and 20 family-sized units. A 54-unit PSH project received Concept Endorsement from the County and Metro in early 2020. In addition, the County plans to release a second NOFA in the fall of 2021 with project evaluation and Concept Endorsement approval in early 2022.

## 2. RACIAL EQUITY DEVELOPMENT METRICS

The following metrics reflect preliminary cost estimates and development plans. These figures will be updated as projects are refined during the planning process. Note that metrics related to total cost take into account all units within a project, whereas metrics related to bond subsidy only consider bond eligible units.

**Table 2a: Location/access**

Project	Location (Address)	Within ¼-mile of frequent service bus?	Within ¼-mile of non-frequent service bus?	Within ½ mile of MAX or WES?	Within 1/3 mile of park or green space?	Walkscore
Viewfinder	SW 72nd Ave & SW Baylor St, Tigard, OR 97223	Yes	Yes	No	No	59
Tigard Senior Housing	8815 SW Omara St, Tigard, OR 97223	Yes	No	Yes	No	51
Terrace Glen	9640 SW Greenburg Rd, Portland, OR 97223	Yes	Yes	No	Yes	64
South Cooper Mountain Development	SW Goldcrest Ln & SW 172nd Terrace, Beaverton, OR 97007	No	No	No	No	11
Plaza Los Amigos	2000 N Davis St Cornelius OR 97113	Yes	No	No	Yes	58
Forest Grove Family Housing	2525 A St, Forest Grove, OR 97116	No	No	No	Yes	61
Basalt Creek	23500 SW Boones Ferry Rd, Tualatin, OR 97062	No	Yes	No	No	13
Aloha Housing Development	3575 SW 174th Ave, Beaverton, OR 97006	Yes	Yes	No	No	75
% of projects that meet criteria:		63%	50%	13%	38%	
				Average walkscore:		49

Proximity should be calculated using the "walk" function in Google Maps.

<https://www.walkscore.com/>

**Table 2a: Location/access (continued)**

Project name	Notes: Describe access to other amenities, including schools and groceries.
Viewfinder	Winco Foods 0.2 miles away, Walmart SuperCenter and Costco 0.5 miles away, Tigard Library and Fanno Creek Park, 1.8 miles away.
Tigard Senior Housing	Adjacent to Fanno Creek Park, Tigard Public Library 0.25 miles away, TriMet line 76 bus stop 0.25 miles away, Fred Meyer 1.8 miles away.
Terrace Glen	Washington Square Transit Center and Mall 0.3 miles away, Target and Grocery Outlet 0.7 miles away, Metzger Elementary School 0.8 miles away.
South Cooper Mountain Development	Mountainside High School 915 feet away, Cooper Mountain Nature Park 1.1 miles away, Safeway 1.34 miles away, Progress Ridge Shopping Center 1.09 miles away, TriMet line 62 bus stop 1.5 miles away
Plaza Los Amigos	Fred Meyer 500 feet away, TriMet line 57 bus stop (high frequency) 1,000 feet away, Cornelius Dog Park and Water Park 0.2 miles away, Cornelius Elementary School 0.4 miles away.
Forest Grove Family Housing	Harvey Clarke Elementary School 0.1 miles away, Lincoln Park 0.3 miles away, TriMet line 57 bus stop 0.7 miles away, Forest Grove Library 1.0 miles away, Safeway 1.5 miles away.
Basalt Creek	Tualatin High School 0.6 miles away, Ibach Park 1.2 miles away, Target 1.5 miles away, Fred Meyer 2.6 miles away, TriMet line 96 bus stop 0.25 miles away
Aloha Housing Development	TriMet line 57 bus stop 300 feet away, Tualatin Hills Nature Park 0.5 miles away, Kinnaman Elementary School, Mountain View Middle School and Aloha High School each approximately 1.3 miles away, Fred Meyer 2.6 miles away.

**Table 2b: Equitable Contracting**

Project name	General contractor	Contracting goal*	
		% total hard costs to be awarded to COBID firms (required metric)	% total soft costs to be awarded to COBID firms (optional metric)
Viewfinder	Bremik	20%	
Tigard Senior Housing	Walsh	30%	
Terrace Glen	Walsh	20%	
South Cooper Mountain Development	Colas	25%	
Plaza Los Amigos	LMC	35%	
Forest Grove Family Housing	LMC	35%	
Basalt Creek	LMC	25%	
Aloha Housing Development	LMC	25%	

\* For projects that have a 'minimum' and 'aspirational' goal, please report the minimum goal.

**Notes for Table 2b: Please provide interim progress for projects that are under construction. If you have additional contracting goals, please note them here.**

The Viewfinder is the one project under construction. It is achieving a rate of 26% COBID firm contracting.

**Table 2c: Prevailing Wage**

Project name	Prevailing wage - Davis Bacon, BOLI
Viewfinder	Yes (Davis Bacon)
Tigard Senior Housing	Yes (Davis Bacon)
Terrace Glen	No
South Cooper Mountain Development	No
Plaza Los Amigos	Yes (Davis Bacon)
Forest Grove Family Housing	No
Basalt Creek	No
Aloha Housing Development	No

**Table 2d: Workforce Participation (if applicable/tracked)<sup>1</sup>**

Project name	Workforce Tracking (Y/N)	Goal for % of total work hours worked by apprentices (optional)	Goal for % of total hours worked by women (optional)	Goal for % of total hours worked by POC (optional)
Viewfinder	Yes			
Tigard Senior Housing	Yes			
Terrace Glen	No			
South Cooper Mountain Development	No			
Plaza Los Amigos	Yes			
Forest Grove Family Housing	No			
Basalt Creek	No			

<sup>1</sup> Although Washington County does not have goals around workforce participation, the jurisdiction still tracks workforce participation for projects that are monitored for Davis Bacon compliance.

Aloha Housing Development	No			
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**Notes for Table 2d: Please provide additional summary information regarding project-level strategies and goals, and interim progress if available.**

Washington County does not currently have specific goals around workforce participation.

**Describe progress toward implementing your LIS strategies for advancing racial equity. In addition to data provided in the above tables, feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you'd like to highlight. 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, including proximity to parks/green space/trails, public elementary/middle/high schools, other types of schools, and groceries*
- b. How selected projects have incorporated or are incorporating strategies for fair housing*
- c. Outcomes or project-level goals/commitments related to diversity in contracting and hiring*
- d. Outcomes or project-level plans to align culturally specific programming and supportive services to meet the needs of tenants.*

Washington County's LIS identified geographic dispersal of projects as a project selection priority, as well as locations near transit and in high opportunity areas. The eight approved projects are well-spread within the County's implementation area – two projects in the western area of the County, one project near the County's southern border, three projects near the northern border and another two projects centrally located. Two projects are located in high opportunity areas, the others are all close to transit service as well as parks, schools, job, and basic need services. Additionally, the County has chosen to encourage each project to provide a plaque or art installation that honors the indigenous land on which each project is located. While this may be viewed as a symbolic gesture, this land acknowledgement raises awareness and serves as a reminder of an ongoing commitment to becoming antiracist.

In the County's NOFA, a draft screening criteria was included as a model for projects. As the projects move forward, screening criteria will need to align with the draft criteria. Each project provided an Affirmative Fair Housing Marketing Plan as well as Supportive Services plan to outline how both fair housing strategies and supportive services will be provided to tenants. Nearly all of the projects are sponsored by a culturally specific organization or have a formed partnership with a culturally specific organization (as co-developer or service provider). A lesson learned from this process is to intentionally highlight and make funding requirements around fair housing and alignment with culturally specific organizations.

The majority of funded projects plan to exceed the County's 20% MWESB contracting goal. The one project under construction now, the Viewfinder is currently at 26% MWESB contracting. Additionally, Colas Construction, Inc., a Black-owned prime contractor, has been selected for the development of the South Cooper Mountain project. In future years, the County will have additional data to report. The County is exploring relationships with LatinoBuilt and the National Association of Minority Contractors (NAMC) to increase achievement in this area.

### 3. COMMUNITY ENGAGEMENT

**Describe your progress toward implementing your LIS strategies for ongoing community engagement (appx 750 words). Where possible, please incorporate engagement data/metrics describing the number of people/organizations engaged and demographics, if available. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. Number of people engaged, including (where possible) demographic breakdown that shows participation of communities of color and other marginalized community members (please do not share names or other identifying information)*
- b. Number of partnerships with community-based organizations, and outreach strategies used to encourage participation and mitigate barriers*
- c. Summary of engagement themes/feedback*
- d. Themes in how feedback directly informed project implementation and outcomes (emphasis on feedback from communities of color and other marginalized groups)*

During the fall of 2020, Washington County, in partnership with culturally specific community-based organizations (CBOs), facilitated five Zoom listening sessions during which BIPOC community members provided feedback regarding the preliminary design and service programming elements of the selected housing projects. As an alternative to participating in the listening sessions and a way to reach a wider audience, surveys for each housing project will be available in Washington County's safe harbor languages on the Washington County website. The feedback received from these listening sessions and surveys will be shared with the housing developers so that community input can inform the finalized design and service programming elements of the housing developments.

County staff and AmeriCorps VISTA member partnered with community-based organizations (CBOs) serving BIPOC communities in Washington County and local BIPOC community activists to facilitate the listening sessions, recruit participants, and advertise the surveys. The engagement partners involved to date include the Somali Empowerment Circle (SEC), the City of Portland Community Engagement Liaisons (CELS) Program, and the Asian and Pacific American Network of Oregon (APANO).

Staff and AmeriCorps VISTA member have also supported Bienestar and DCM Communities in community engagement efforts for the Forest Grove Family Housing Metro Bond project. This has involved providing meeting support for two focus groups that Bienestar facilitated in the fall of 2020 and helping DCM coordinate a neighborhood meeting which will occur in January 2021.

### *Listening Session Overview*

Two types of listening sessions were developed: multi-family housing and senior housing/senior friendly housing. There were separate sessions for each BIPOC community the County engaged with and sessions were led either fully in English or collaboratively in both English and the communities' preferred language. Based on each project's target population, demographic distribution of Washington County, and the capacity of our engagement partners, we determined how many listening sessions per community group and which projects to feature in each session.

SEC led two listening sessions for the Somali community: a multi-family housing session and a senior housing session. The CELs Program led two multi-family housing sessions: one for the Black community and one for the Native American community. APANO led one multi-family housing session for the API community. The first section of each listening session provides an overview of what affordable housing is and how the Area Median Income (AMI) statistic is used to determine a household's eligibility for affordable housing programs. The second section is the project presentation portion where 2 to 4 of the Metro Bond-funded housing projects are described (location, unit breakdown, nearby amenities – parks, grocery stores, schools, transit). The rest of the session is dedicated to hearing the participants' feedback regarding various aspects of the communal spaces and programs of the housing projects (i.e. outdoor spaces, community room, laundry room, resident services, parking).

### *Best Practices*

The number of staff members present in each listening session was limited with engagement partners leading the sessions to help create a safe, comfortable space for participants to share their experiences. Engagement partners helped determine best ways to facilitate discussion in a virtual setting. For SEC's sessions, the facilitators asked all the questions aloud. For the sessions that CELs and APANO led, the Zoom polling function was used in addition to asking questions aloud.

### *Lessons Learned and Opportunities for Improvement*

At one listening session the target number of participants was not met due to participants having last minute scheduling conflicts and technological issues (issues with connecting to Zoom, internet connection). Learning for the future based on this experience include recruiting more participants or having alternates for participants who cannot attend the meeting, sending the participants more reminders in the days leading up to sessions, and having the facilitators do more thorough Zoom assistance check ins prior to the session.

### Number of People Engaged

- 46 BIPOC community members

### Demographic Breakdown of Participants

- 24 Somali community members
- 7 Black community members
- 8 Native American community members
- 7 API community members

### Outreach Strategies

Engagement partners recruited participants via email, text, WhatsApp, and phone calls.

### Major Themes

- Unit breakdown
  - Projects have too many studio and 1 BR units and not enough 3BR and 4 BR units
  - Not enough units set at 30% AMI, especially for the bigger units
- Unit size
  - Units need to be larger to accommodate multigenerational living dynamics
- Outdoor spaces
  - Community gardens viewed as a tool to connect residents to one another and provide residents with food autonomy
  - Outdoor covered space (play areas, courtyard/picnic areas)
  - Play areas centrally located so parents/guardians can monitor children from units/community building/laundry room
  - Green spaces for children to play
- Laundry facilities
  - Not enough washer/dryer capacity given the family sizes
  - Paying to use washer/dryer is financial burden
  - Bigger units should have washer/dryers and smaller units should use laundry room
  - Providing laundry assistance for seniors
- Community room
  - Serve as a space for building community through:
    - Sharing and celebrating cultural heritage (cultural events/activities, cultural resource sharing, communal cooking)
    - Family gatherings

### *Feedback Informing Project Design*

The Forest Grove Family Housing project is the closest to beginning construction (after the County's Phase I project which is under construction). As the project has refined its design, it has incorporated community engagement feedback. Specifically, during community engagement sessions feedback suggested that family-sized units should be closest to the outdoor space so parents can easily look out of their units and monitor children playing outside. It was also suggested that play areas be divided to provide age-specific play areas. Additionally, feedback indicated that onsite community space was very important for larger gatherings such as birthday parties and other celebrations. This feedback was incorporated into the design with the unit configuration shifted to allow for family-size units closest to outdoor play areas, age-specific play areas, and addition of community space.

As the other projects refine their design, they will be informed in specific ways by this community feedback.

## ATTACHMENT A: SHS INTEGRATION ADDENDUM

Please describe your anticipated strategy or strategies for integrating SHS funds into your Housing Bond implementation strategy. Possible approaches may include:

- a. Increase capital construction by utilizing SHS funds for rental assistance/operating subsidy to meet existing 30% AMI unit goals and increase production of 60% AMI units;
- b. Increase the number of 30% AMI units by leveraging SHS funds to exceed the minimum goal for deeply affordable units;
- c. Prioritize supportive housing by leveraging SHS funds to provide supportive services to units created through the housing bond;
- d. A combination to the above;
- e. No change in production or affordability targets; plan to use SHS funds only for rental assistance to fill identified operating gaps as modeled by Metro; or
- f. No change in production or affordability targets; no use of SHS funds.

1. Please complete the below tables describing your anticipated approach or approaches for all approved bond projects and for remaining bond funds not yet committed.

### Existing Projects with Concept Endorsements or Final Approval

Project Name	Approach(es) (see above options)
Phase I Project – under construction	No change in production or affordability targets
Approved Metro Bond projects – 7 projects with Concept Endorsements	Prioritize supportive housing by leveraging SHS funds to provide supportive services to units created through the housing bond. Approved projects include 58 PSH units

### Remaining Bond Funds

Project or solicitation name (use multiple rows if multiple approaches will be used to select projects for remaining funds – or just list “all remaining funds” if only one approach will be used)	Approach(es) (see above options)
Aloha Inn – received Concept Endorsement in January 2021	This is a 54-unit PSH project. SHS funds will be considered for rental assistance and service delivery funds.

Remaining bond-funded projects	Multiple approaches will be considered on a project-by-project basis to support successful implementation of the housing bond and SHS.
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**2. Provide a brief narrative (500 word max) describing the rationale for these approaches and how you arrived at them. As relevant, you may wish to include description of financial modeling and policy considerations that have helped to inform your approach.**

In the Washington County Affordable Housing Bond Local Implementation Strategy (LIS), which was approved by Metro Council and Washington County Board of Commissioners in December 2019, the County set a goal of producing 100 Permanent Supportive Housing (PSH) units out of the 814 total affordable housing units to be produced with the Metro Affordable Housing Bond. The Washington County Board of Commissioners reviewed three drafts of the LIS in April – June 2019 as the document was developed. The PSH unit goal was added as part of the Board review of the second draft and was based on the *Tri-County Equitable Housing Strategy to Expand Supportive Housing for People Experiencing Chronic Homelessness*, which was received by the Board of Commissioners in Work Session on April 9, 2019. Washington County is one of two implementing partners of the Metro Affordable Housing Bond that established a goal for PSH unit production in its LIS. While the SHS measure was not developed or approved at the time the LIS was drafted, a future source of funding for services was envisioned,

*Washington County will also look for opportunities to leverage existing services with language in RFPs for project-based vouchers. Providing deeper subsidies to properties in the form of project-based vouchers can allow for the flexibility to help fund some of the important services that may be needed. Washington County will monitor legislation at the State level regarding permanent supportive housing capital, rental subsidy and service dollars. Should funding for permanent supportive housing be offered, Washington County will apply and leverage funds with Metro Affordable Housing Bond Program funds to create deeply affordable housing. (Washington County LIS, pg. 22)*

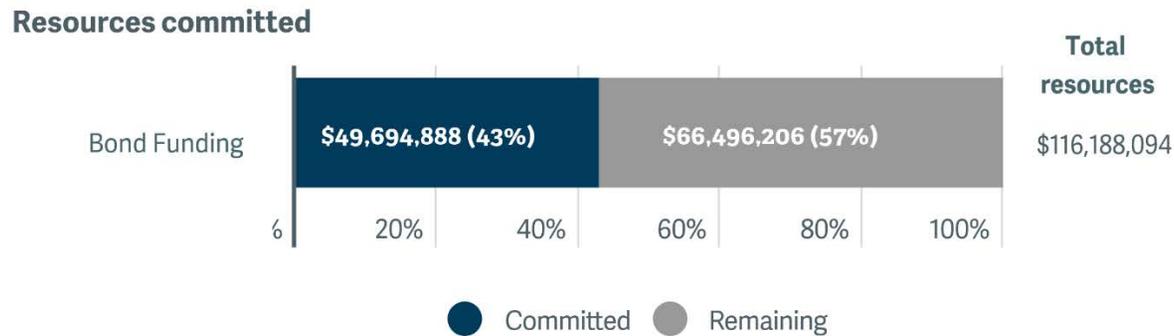
Within the current eight Affordable Housing Bond projects in the County (this includes the County’s Phase I project and seven projects that the BOCC approved for Concept Endorsement on September 1, 2020), there are 58 PSH units proposed. Development of these PSH units are to be supported with Project Based Section 8 Vouchers. The services, however, are not a component funded by the Metro Affordable Housing Bond or Project Based Vouchers. All projects with PSH units prepared a Supportive Services Plan, and most referenced the Supportive Housing Services (SHS) measure as a potential funding source for ongoing service delivery in those plans as the measure was approved by voters right before NOFA applications were due this past May. Once an application process for the SHS funds is available and as the housing units are built and available for lease-up, it is likely that these project sponsors will apply for support services for PSH units at Metro bond-funded projects. For future Metro bond-funded projects, the County will continue to explore options for alignment between the Supportive Housing Program funded by the Supportive Housing Measure (SHS). This alignment will be informed by the County’s development of its Local Implementation Plan for SHS.

# Housing Bond Progress Report for Clackamas County | 2020

*The purpose of this report is to summarize Clackamas County's progress toward implementing the strategies in its approved Local Implementation Strategy (LIS), for consideration by Metro's Affordable Housing Bond Community Oversight Committee.*

## 1. PROJECTS UNDERWAY

As of the end of December 2020, Clackamas County has four projects underway. These projects represent 459 new affordable homes, or 57% of Clackamas County's total production target for the Housing Bond, while using up approximately 43% of its allocated \$116,188,094 in funding.



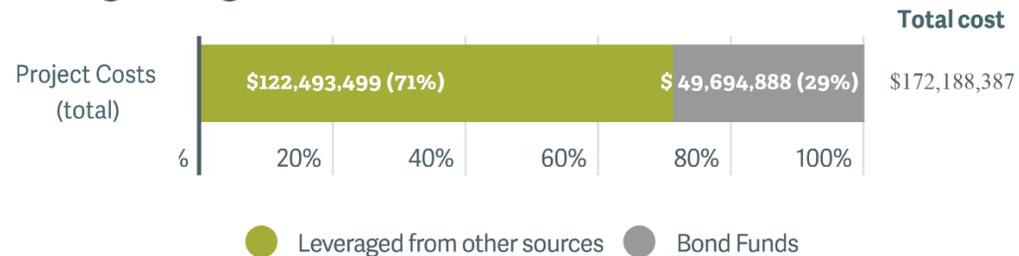
Of the homes created, 291 will have 2 or more bedrooms, representing 72% of its target for family-size homes; and 201 will be affordable to households with incomes at or below 30% of area median income (AMI), representing 60% of their Housing Bond target for deeply affordable homes.

**Table 1a: Summary of projects underway**

Project	Developer	Metro Bond Funds	Total Project Cost	Status	Anticipated ground-breaking date	Anticipated construction completion date
				<i>concept, final, construction, completion</i>		
Webster Road	Housing Authority of Clackamas County	\$ 6,891,888	\$17,900,000	concept	May-21	Apr-22
Maple Apartments	Community Development Partners and Hacienda CDC	\$15,903,000	\$53,041,069	concept	Oct-21	Jun-22
Good Shepherd Village	Caritas Housing + Catholic Charities	\$18,330,000	\$53,902,667	concept	Dec-21	Jun-23
Fuller Station	GSA (Anna Geller), GRES (Thomas Brenneke)	\$8,570,000	\$47,344,651	concept	Feb-21	Apr-22
Total committed or underway		<b>\$ 49,694,888</b>	<b>\$ 172,188,387</b>			
Total percentage committed or underway		<b>43%</b>				

 Shading indicates a Phase 1 project

**Amount of funding leveraged from other sources**

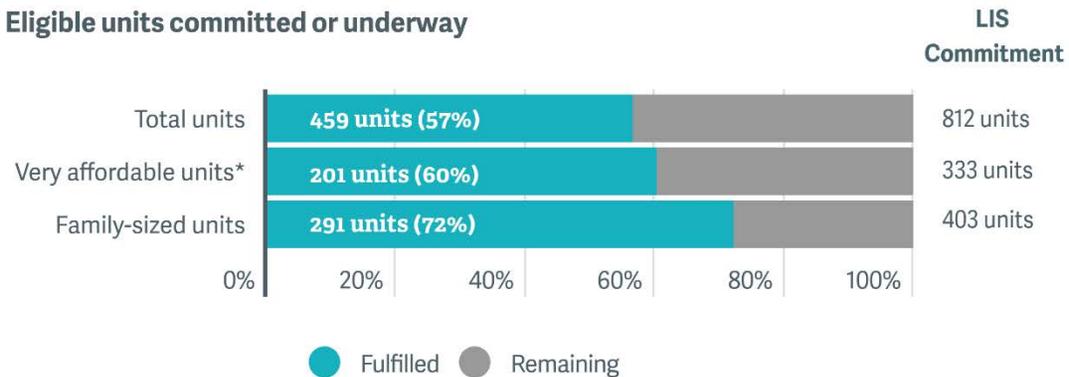


**Table 1b: Unit production**

Tallies include **only** bond-eligible units; manager units or other non-bond funded units are not included in these counts.

Project	Total units	30% AMI units	2+ BR units	30% AMI and 2+ BR units	61-80% AMI units (should be no more than 10% of total units)	# of Project-based Vouchers
Webster Road	48	48	0	0	0	48
Maple Apartments	171	70	129	46	0	70
Good Shepherd Village	141	58	79	10	0	30
Fuller Station	99	25	83	13	5	25
Total committed or underway	459	201	291	69	5	173
LIS Commitment	812	333	403	N/A	N/A	200
% of commitment fulfilled	57%	60%	72%	N/A	N/A	87%
Remaining to achieve local targets	353	132	112	N/A	N/A	27

**Eligible units committed or underway**



\*refers to households at 30% Area Median Income (AMI)

**Narrative 1: Referencing the data above, provide a narrative (appx. 750 words) describing progress toward implementing the development plan in your LIS. Feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you'd like to highlight. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. Description and results of competitive selections, including who was involved and how LIS criteria were applied and impacted the outcome.*
- b. Cost containment strategies.*
- c. Leveraged capital and ongoing operating funding.*
- d. Approach(es) to aligning resident or supportive services.*
- e. Plans, strategies and anticipated timelines for achieving remaining unit production targets (total, 30% AMI, 2+ bedrooms).*

Originally constructed in the early 1960's, the Webster Road building was previously used as a nursing home and most recently as a juvenile rehabilitation center. The building has been vacant since 2017 and in June of 2019, the Housing Authority acquired the property using Metro Affordable Housing Bond funds. Since acquisition, HACC has been working through a variety of pre-development activities including community outreach, obtaining planning approvals, conducting building inspections, program planning, design development, and securing funding commitments.

In September of 2019, the Housing Authority successfully applied to participate in the state's Permanent Supportive Housing (PSH) Pilot program. The PSH program pairs intensive staff training about supportive housing with capital and services funding for the development of supportive housing units. In April 2020, the Webster Road project was awarded \$2.4MM in PSH capital funding and an annual services subsidy to support 12 units of Permanent Supportive Housing that will be reserved for disabled seniors with a history of homelessness. HACC is partnering with Home Forward to provide property management and resident services to Webster Road residents.

Design and programming best practices identified in PSH training, combined with the onset of the coronavirus pandemic helped inform our redevelopment strategy. The pandemic highlighted the need for resident autonomy and self-sufficiency. The building, as originally designed, has shared half-bathrooms in between units and a bank of separate shower stalls. Meals were prepared in a commercial kitchen and provided in a communal dining hall. It is important to the Housing Authority that each resident has the ability to prepare food, bathe, and use the bathroom in their individual units. As redesigned, each unit will include a full private bathroom and a food prep area with a sink, fridge, and microwave. Common area amenities include a community kitchen, a dining hall, a community living room, a laundry room, an exam room and various meeting and conferences spaces. In addition, the site will include a landscaped courtyard and a community garden for resident use.

HACC anticipates starting construction in May 2021 with completion targeted in spring 2022. Once complete, Webster Road will provide 48 homes affordable to seniors, aged 50 and older, who are on fixed incomes or making less than \$20,000 a year.

In January of 2020, the Housing Authority of Clackamas County (HACC) issued a Notice of Funding Availability (NOFA) availing \$40.67MM, or 35% of the County's total bond resources and 125 project-based vouchers (PBVs). Several criteria from the County's LIS were captured in the threshold requirements. These requirements included

- 40% of the units in a project must be affordable to households earning 30% or less of AMI;
- 50% of the units in a project must include two or more bedrooms;
- Project sponsors must hold at least two engagement sessions during predevelopment;
- Low-barrier screening criteria: units must be made available to households with adverse credit, rental, and legal histories, and very limited income; and
- Projects must achieve at least 20% COBID certified subcontractor participation and 20% COBID certified professional services participation.

In addition to the threshold requirements, the NOFA scored projects based on priority criteria identified in the County's LIS including:

- **Cost Containment:** points were awarded to projects requesting less subsidy per unit with a maximum bond subsidy of \$130,000 per unit. HACC also proposed to act as the conduit bond issuer as a cost reduction strategy.
- **Location:** points were awarded to projects located close to public transit, grocery stores, parks and recreation areas, schools and medical facilities.
- **Unit Sizes and Income Levels:** points were awarded to projects that included a higher percentage of units with two or more bedrooms and rents at or below 30% AMI. HACC leveraged PBV resources to incentivize and support the ongoing operations of 30% AMI units.
- **Target populations:** points were awarded to projects that reserved units for households facing high barriers to housing and additional points were awarded for projects proposing PSH units. HACC required that all PBV-supported units must be filled from Clackamas County's Coordinated Housing Access (CHA) system in collaboration with the HACC's waitlist process.
- **Advancing Racial Equity:** HACC required that each project submit an Equity Plan and points were awarded based on the comprehensiveness, specificity, quality of engagement, and quality of services proposed.
- **Readiness:** points were awarded to projects with entitlements in place and with MOUs with service providers

HACC received five proposals requesting a total of just over \$69MM in bond subsidy and 221 project-based vouchers to support the development of 611 new housing units, including 408 units with two or more bedrooms and 251 units affordable to households with incomes 30% AMI and below.

HACC's proposal review process involved a multi-step assessment. HACC staff conducted an initial threshold review of the proposals and developed a rubric to evaluate them. Next, proposals were reviewed and scored by the Technical Review Committee (TRC) which included representatives from HACC, Clackamas County, and Metro. The TRC provided their scoring and recommendations to HACC's Housing Advisory Board (HAB). The HAB consists of volunteers—with lived and professional experience—dedicated to increasing affordable housing options and access in Clackamas County. The HAB reviewed applications and provided feedback to HACC staff. Staff followed up

on due diligence items and reached out to project sponsors with questions from the TRC and HAB. HACC staff compiled all of the final score sheets and ranked the proposals accordingly. The three highest ranking proposals were recommended to the Board of County Commissioners and Metro for award.

The scoring and LIS-derived selection criteria included in the NOFA played a key role in helping HACC award projects that, in total, meet 57% of the County's total unit production target—including 60% of the target goal for 30% AMI units and 72% of the target goal for units with two or more bedrooms—while utilizing only 43% of the County's total bond allocation. To ensure that development goals and timelines stay on track, HACC is working in tandem with the awarded project sponsors to provide advocacy, resource connection, and assistance with community outreach.

HACC is working on several strategies to meet the County's remaining unit production targets. One strategy includes focusing efforts on the redevelopment of our Hillside Park Public Housing complex. HACC is currently working through the disposition and rezoning process. This effort could facilitate the development of up to 400 new units of housing – a majority of which will be affordable to households making 30-80% of AMI. In addition, HACC plans to release a second NOFA round in 2022, availing remaining bond funds. This multi-strategy approach will help ensure that HACC can meet, and likely exceed, unit production targets.

## 2. RACIAL EQUITY DEVELOPMENT METRICS

The following metrics reflect preliminary cost estimates and development plans. These figures will be updated as projects are refined during the planning process. Note that metrics related to total cost take into account all units within a project, whereas metrics related to bond subsidy only consider bond eligible units.

Table 2a: Location/access

Project	Location (Address)	Within ¼-mile of frequent service bus?	Within ¼-mile of non-frequent service bus?	Within ½ mile of MAX?	Within 1/3 mile of park or green space?	Walkscore	
Webster Road	18000 Webster Rd, Gladstone, OR 97027	Yes	Yes	No	Yes	53	
Maple Apartments	South Maplelane Rd at South Beaver creek Rd Oregon City, OR 97045	Yes	Yes	No	Yes	48	
Good Shepherd Village	12596 SE 162nd Ave., Happy Valley OR	No	Yes	No	No	30	
Fuller Station	9608 S.E. Fuller Road, Happy Valley, OR 97086	Yes	Yes	Yes	No	67	
% of projects that meet criteria:		75%	100%	25%	50%		
						Average walkscore:	50

Proximity should be calculated using the "walk" function in Google Maps.

<https://www.walkscore.com/>

**Table 2b: Equitable Contracting**

Project name	General contractor	Contracting goal*	
		% total hard costs to be awarded to COBID firms (required metric)	% total soft costs to be awarded to COBID firms (optional metric)
Webster Road	Walsh	20%	
Maple Apartments	LMC	20%	
Good Shepherd Village	Walsh	25%	
Fuller Station	R&H Construction	20%	

\* For projects that have a 'minimum' and 'aspirational' goal, please report the minimum goal.

**Notes for Table 2b: Please provide interim progress for projects that are under construction. If you have additional contracting goals, please note them here.**

N/A. No projects under construction yet.

**Table 2c: Prevailing Wage**

Project name	Prevailing wage - Davis Bacon, BOLI
Webster Road	Yes (Davis Bacon)
Maple Apartments	Yes (Davis Bacon)
Good Shepherd Village	Yes (Davis Bacon)
Fuller Station	Yes (Davis Bacon and BOLI)

**Table 2d: Workforce Tracking**

Project name	Workforce Tracking (Y/N)	Goal for % of total work hours worked by apprentices (optional)	Goal for % of total hours worked by women (optional)	Goal for % of total hours worked by POC (optional)
Webster Road	Yes			
Maple Apartments	Yes			
Good Shepherd Village	Yes			
Fuller Station	Yes			

**Notes for Table 2d: Please provide additional summary information regarding project-level strategies and goals, and interim progress if available.**

HACC is working with sponsors to establish workforce goals and looking at ways HACC can support their efforts in collecting this data.

**Describe progress toward implementing your LIS strategies for advancing racial equity. In addition to data provided in the above tables, feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you’d like to highlight. 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, including proximity to parks/green space/trails, public elementary/middle/high schools, other types of schools, and groceries*
- b. *How selected projects have incorporated or are incorporating strategies for fair housing*
- c. *Outcomes or project-level goals/commitments related to diversity in contracting and hiring*
- d. *Outcomes or project-level plans to align culturally specific programming and supportive services to meet the needs of tenants.*

HACC’s NOFA provides points to projects located near public transit, grocery or drug stores, medical services, libraries, or senior centers, public schools, and parks, recreation or community centers. As a result, 100% of HACC’s bond projects are located within a quarter mile of bus-service and within a half mile of a grocery or drug store.

HACC supports low-barrier screening and requires that bond-funded units are made available to households with adverse credit, rental, and legal histories, and very limited income. HACC will closely monitor screening criteria and lease-up processes as projects progress.

HACC's NOFA requires sponsors to provide a detailed plan to achieve at least 20% COBID certified subcontractor participation and 20% COBID certified professional services participation. The County's first two bond projects are slated to break ground in the first half of 2021 and HACC will be tracking labor and wage monitoring closely. Workforce tracking is something that HACC has interest in implementing but additional resources like tracking software and technical assistance are needed to meet this goal.

All three of the projects awarded through the NOFA process include partnerships with culturally specific community organizations. One project has units designated for agricultural workers and field laborers– this project includes a partnership with Hacienda CDC, Oregon's largest Latino-led, Latino-serving housing organization. Hacienda staff will work closely with the property management to provide culturally specific language services and establish low-barrier screening criteria. The project is designed with farmworkers in mind and includes unit sizes for large families, outdoor/garden spaces, and culturally-specific programming.

Furthermore, with the recent passage of Metro's Supportive Housing Services measure, HACC is working to build a consortium of culturally specific community organizations and service providers to provide resident services and case management to residents in bond-funded projects. HACC is working on services packages that pair rental assistance with wrap around services to encourage sponsors to support additional PSH units in bond-funded projects.

### 3. COMMUNITY ENGAGEMENT

**Describe your progress toward implementing your LIS strategies for ongoing community engagement (appx 750 words). Where possible, please incorporate engagement data/metrics describing the number of people/organizations engaged and demographics, if available. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. Number of people engaged, including (where possible) demographic breakdown that shows participation of communities of color and other marginalized community members (please do not share names or other identifying information)*
- b. Number of partnerships with community-based organizations, and outreach strategies used to encourage participation and mitigate barriers*
- c. Summary of engagement themes/feedback*
- d. Themes in how feedback directly informed project implementation and outcomes (emphasis on feedback from communities of color and other marginalized groups)*

From the early stages of community engagement that focused on developing the Local Implementation Strategy (LIS) to project specific engagement, Clackamas County strives to ensure that the county's most impacted communities have a say in shaping the housing bond program and bond-funded projects. While seeking input to develop and inform the LIS, the County contracted with a culturally specific provider, Unite Oregon, to partner on engagement efforts with low-income community members, communities of color, people with limited English proficiency, immigrants and refugees, and people with disabilities. Community events conducted in partnership with Unite Oregon engaged over 100 participants and included recent immigrants, longtime residents, multiple nationalities, varying age groups, and multiple ethnicities and races. Demographic data was not requested of participants in these early events, this information is based on solely on observations by county staff.

Participants advocated for more affordable housing suitable for a diverse range of populations including communities of color, people with disabilities, seniors, households with children, and single individuals.

Key themes and priorities emerged from these engagement efforts across all stakeholder groups, including;

- Improved access to multimodal transportation systems
- Increased affordable housing with access to jobs and job centers
- Improved access to health services (including mental health and addiction services)
- Improved access to community amenities such as grocery stores, green spaces, childcare and good schools.

Based on this feedback, the Housing Authority of Clackamas County (HACC) developed a Notice of Funds Available (NOFA) that prioritized projects that included easily accessible transportation options and access to the community amenities highlighted above. The NOFA also prioritized projects with robust community engagement and equity goals. The three projects awarded through the NOFA process include a total of nine partnerships with community-based organizations including six that are culturally specific (Hacienda, APANO, El Programa

Hispano Católico, JOIN, IRCO, and Unite Oregon). A common outreach strategy to reduce barriers and encourage participation was to increase language access at community events. This included providing translations services and materials in a multiple languages including Spanish, Russian, Ukrainian, Vietnamese, and Mandarin.

Several themes emerged specifically from engagement with communities of color and historically marginalized communities. These include family-sized units and unit mixes that can support multi-generational families, outdoor spaces with mixed programming (gardens, covered areas, playgrounds—something for everyone) and access to community spaces (community rooms in buildings, housing near parks or green spaces and community amenities like libraries and community centers). There was also a desire for access to free or low-cost educational opportunities, and family-friendly and culturally-specific activities. One project sponsor heard from houseless and formerly houseless women who expressed a preference for bathrooms with bathtubs. The developer is prioritizing the inclusion of bathtubs, even in smaller units.

Toward the end of 2020, HACC and Metro staff, held a community engagement workshop with two project sponsors to help inform and support their efforts. We discussed best practices for collecting demographic data and highlighted the importance of collecting this data to help measure outcomes. Project sponsors seemed to understand the importance of data collection and showed a willingness to incorporate this in their outreach efforts moving forward. HACC anticipates more participation demographics will be collected as these projects progress through predevelopment and programming.

## ATTACHMENT A: SHS INTEGRATION ADDENDUM

Please describe your anticipated strategy or strategies for integrating SHS funds into your Housing Bond implementation strategy. Possible approaches may include:

- a. Increase capital construction by utilizing SHS funds for rental assistance/operating subsidy to meet existing 30% AMI unit goals and increase production of 60% AMI units;
- b. Increase the number of 30% AMI units by leveraging SHS funds to exceed the minimum goal for deeply affordable units;
- c. Prioritize supportive housing by leveraging SHS funds to provide supportive services to units created through the housing bond;
- d. A combination to the above;
- e. No change in production or affordability targets; plan to use SHS funds only for rental assistance to fill identified operating gaps as modeled by Metro; or
- f. No change in production or affordability targets; no use of SHS funds.

1. Please complete the below tables describing your anticipated approach or approaches for all approved bond projects and for remaining bond funds not yet committed.

### Existing Projects with Concept Endorsements or Final Approval

Project Name	Approach(es) (see above options)
Fuller Road Station	C, F
Webster Road Redevelopment	C
Good Shepherd Village	D
Maple Apartments	D

### Remaining Bond Funds

Project or solicitation name (use multiple rows if multiple approaches will be used to select projects for remaining funds – or just list “all remaining funds” if only one approach will be used)	Approach(es) (see above options)
Hillside Park Redevelopment	D
Bond NOFA Round 2	D

**2. Provide a brief narrative (500 word max) describing the rationale for these approaches and how you arrived at them. As relevant, you may wish to include description of financial modeling and policy considerations that have helped to inform your approach.**

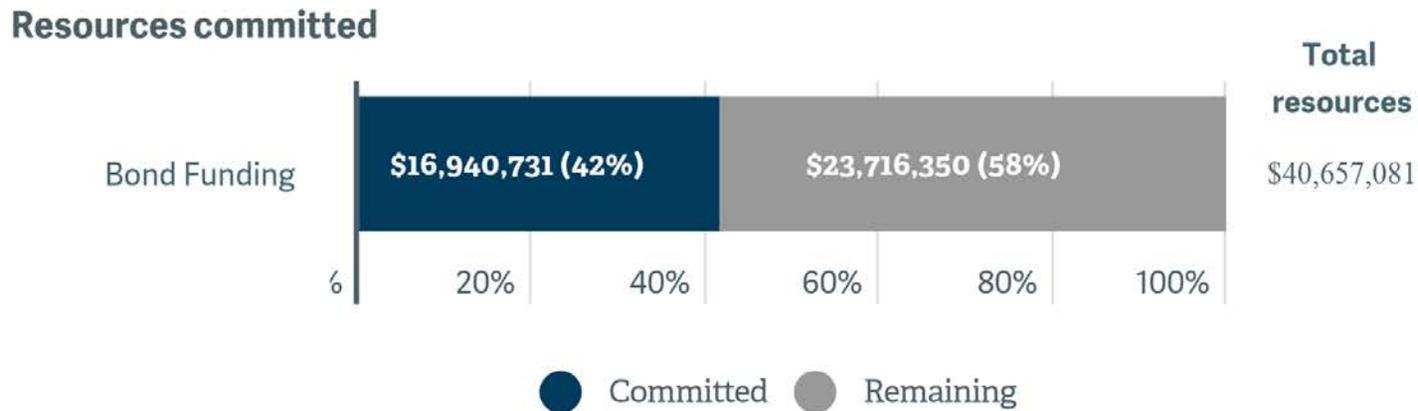
Providing rental assistance to support the 30% AMI units will provide added assurance that HACC can meet our unit production goals and that these units will remain affordable through the compliance period. In addition, providing rental assistance may allow for the increased production of more units if the rental income can be leveraged to support more permanent debt. Using SHS funds to provide supportive services to bond funded units will help provide the level of services needed to support residents to stay housed and provide them with the assistance and services they need to meet their individual goals.

# Housing Bond Progress Report for City of Hillsboro | 2020

*The purpose of this report is to summarize Hillsboro’s progress toward implementing the strategies in its approved Local Implementation Strategy (LIS), for consideration by Metro’s Affordable Housing Bond Community Oversight Committee.*

## 1. PROJECTS UNDERWAY

As of the end of December 2020, the City of Hillsboro has one project underway. This project represents 149 new affordable homes, or 52% of Hillsboro’s total production target for the Housing Bond, while using up approximately 42% of its allocated \$40,657,081 in funding.

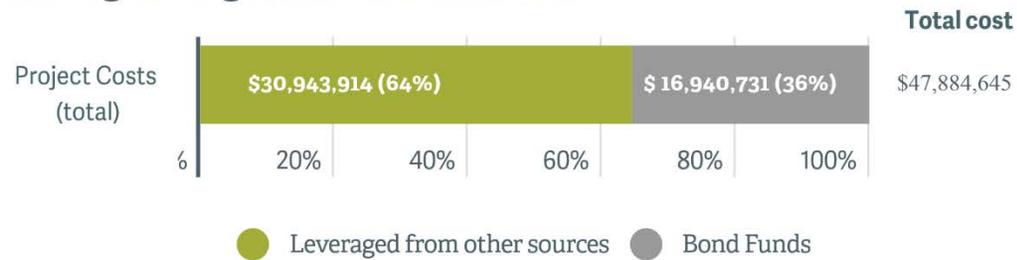


Of the homes created, 105 will have 2 or more bedrooms, representing 74% of its target for family-size homes; and 60 will be affordable to households with incomes at or below 30% of area median income (AMI), representing 51% of their Housing Bond target for deeply affordable homes.

**Table 1a: Summary of projects underway**

Project	Developer	Metro Bond Funds	Total Project Cost	Status	Anticipated ground-breaking date		Anticipated construction completion date	
				<i>concept, final, construction, completion</i>	Month	Year	Month	Year
Nueva Esperanza	Bienestar/Housing Development Center	\$ 16,940,731	\$ 47,884,645	concept	Nov	21	Jun	23
Total committed or underway		\$ 16,940,731	\$ 47,884,645					
Total percentage committed or underway		42%						

**Amount of funding leveraged from other sources**

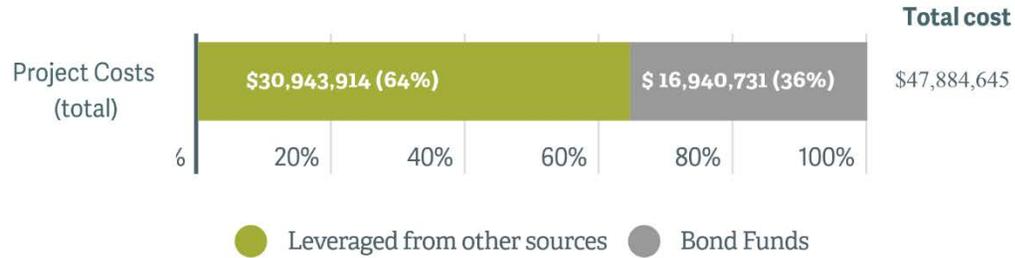


**Table 1b: Unit production**

Tallies include **only** bond-eligible units; manager units or other non-bond funded units are not included in these counts.

Project	Total units	30% AMI units	2+ BR units	30% AMI and 2+ BR units	61-80% AMI units (should be no more than 10% of total units)	# of Project-based Vouchers
Nueva Esperanza	149	60	105	36	0	8
Total committed or underway	<b>149</b>	<b>60</b>	<b>105</b>	<b>36</b>	N/A	<b>8</b>
LIS Commitment	284	117	142	N/A	N/A	0
% of commitment fulfilled	52%	51%	74%	N/A	N/A	N/A
Remaining to achieve local targets	<b>135</b>	<b>57</b>	<b>37</b>	N/A	N/A	N/A

**Amount of funding leveraged from other sources**



***Narrative 1: Referencing the data above, provide a narrative (appx. 750 words) describing progress toward implementing the development plan in your LIS. Feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you'd like to highlight. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:***

As highlighted in the metrics above, the Nueva Esperanza project, selected through a competitive City Request for Proposals (RFP), represents significant progress toward the goals and production targets contained in Hillsboro's Local Implementation Strategy. The following sections provide further details.

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

The City of Hillsboro issued a Request for Proposals (RFP) in mid-March to competitively bid disposition and development of a 6-acre City-owned site on 53<sup>rd</sup> Ave. for affordable housing. The RFP resources included up to \$18 Million (of the City's total share of \$40.6 Million) in Regional Housing Bond funds available for the project.

The following project goals were identified in the RFP for the 53<sup>rd</sup> Avenue site, directly reflecting priorities of Hillsboro's Local Implementation Strategy (LIS) and the Regional Housing Bond Framework:

- 120 affordable units minimum
- 40% of the total units minimum to be deeply affordable (30% AMI or below)
- 50% of the total units minimum to be family-sized - two bedrooms or larger
- Targeted tenant population: low and very-low income families, particularly communities of color as outlined in the LIS
- Integration with surrounding Parks amenities
- Compatibility with adjacent neighborhood
- High quality, cost-efficient, sustainable design
- Design maximized for pedestrian activity and safety
- Community spaces, resident services and on-site amenities
- Community engagement throughout
- Racial Equity emphasis including 20% MWESB-DV contacting, affirmative marketing and low-barrier screening

At the June RFP deadline, the City received five (5) project proposals from affordable housing development teams - an excellent response, especially amidst the COVID pandemic. The City formed an evaluation committee to help review and score the proposals. The Affordable Housing Project Advisory Committee (HPAC) evaluation helped inform the Staff-recommended project. The HPAC is comprised of the following nine members:

Wil Fuentes	Community Member (Former Planning Commission Member)
Pooja Dalal	Community Member (Planning Zoning Hearings Board Member)
Olga Acuña	Community Member (Hillsboro School District, Former City Councilor)
Komi Kalevor	Community Member (Housing Authority of Washington County Director)
Simone Brooks	Assistant City Manager
Dan Dias	Economic and Community Development Director
Colin Cooper	Planning Director
Elaine Baker	Purchasing Manager
Chris Hartye	Senior Project Manager

Notably, a majority of the committee members are ethnically and racially diverse and have experience with land use, contracting and development. The HPAC held an orientation meeting in May and an initial evaluation meeting in late July, at which time two RFP finalists were identified. Those finalists were interviewed by Staff and members of the HPAC in early August. The initial scoring as well as subsequent interviews led to the selection and Staff-recommendation of the Nueva Esperanza project for Concept Endorsement, approved by the Hillsboro City Council and Metro in November 2020.

*b. Cost containment strategies.*

**Cost-Efficient Design:** The Nueva Esperanza development team has emphasized attentive, efficient site design and building forms with cost efficient and durable materials and surfaces. Arbitrary ornament and design “clichés” have been avoided. The selected building type is simple, tried and true wood framed walk-up apartments. This style avoids additional costs of mechanical and elevator systems, as well as unknowns of more complex construction, and wage premiums of taller buildings.

**Cost Efficient Operations:** As an Earth Advantage gold certified project, the development and the units will have reduced operational costs due to LED lighting, efficient heating and cooling with PTHP units, increased insulation and water saving fixtures. The solar-ready installation for the community building will offer the opportunity to engage a partner for the installation of a photovoltaic system.

With these and other strategies in place, per unit costs at Nueva Esperanza, across all unit sizes, are \$319,231, which is 4.5 percent below the limits published by OHCS in 2019. The project is requesting \$113,696 in Metro bond funds per affordable unit which is \$29,304 less than, or 20.5 percent below, the City’s average bond expenditure amount to reach its unit goals outlined in the LIS. Cost per bedroom is \$154,467, demonstrating a high level of cost efficiency.

*c. Leveraged capital and ongoing operating funding.*

The Nueva Esperanza project leverages \$16,940,731 of Hillsboro’s Bond funds with non-competitive 4 percent LIHTC equity, tax exempt bonds, private bank financing, and an OHCS Multifamily Energy Program grant. Community Housing Fund (CHF) has approved a \$750,000 predevelopment loan and Meyer Memorial Trust has expressed support for the Nueva Esperanza project and has provided a \$50,000 predevelopment grant.

The project’s cashflow and reserves are sufficient for ongoing operations, an application for the use of eight (8) project-based Section 8 vouchers is submitted, and other funding opportunities such as Metro Supportive Housing Services (SHS) funding will be explored.

*d. Approach(es) to aligning resident or supportive services.*

Bienestar’s Promotores Program is the cornerstone of the Nueva Esperanza resident services model. This program recruits and empowers resident leaders (Promotores) who act as “community connectors,” doing home visits and providing residents with referrals to relevant services. In addition, Bienestar’s resident services will bring in more than 10 partner organizations to provide financial capabilities services, youth enrichment, health, and leadership development and other services for residents. Resident services staffing (1.0 FTE) will be provided on-site through the operating budget.

Bienestar has been actively involved in the conversations surrounding the Metro homeless services levy. Building on its existing base of resident services and the newly secured resource of the Metro homeless services levy, Bienestar anticipates growing its capacity in partnership with organizations like Sequoia Mental Health Services and Community Action, to potentially serve homeless or formerly homeless households at Nueva Esperanza.

*e. Plans, strategies and anticipated timelines for achieving remaining unit production targets (total, 30% AMI, 2+ bedrooms).*

The City has been working with Metro staff to explore sites in Hillsboro for potential acquisition for additional affordable housing projects. The preferred strategy is to bring forward another publicly-owned, vacant, green-field site for a City/Metro joint-solicitation process for disposition and development within the next 12 to 18 months. This would lead to a second bond-funded new development project to achieve a sizeable portion of the remaining 135 unit production target. Thus far, it has proven difficult to find sites on the private market that are zoned appropriately, in priority areas and available for purchase. In 2021, the City will continue to work with Metro in this endeavor and will also explore off-market opportunities such as working with local churches, the Hillsboro School District and area nonprofits. The City will also explore acquisition-rehabilitation opportunities at existing housing developments. Dependent on the results of these efforts, the City will plan for issuance of a Notice of Funding Availability (NOFA) calling for developer proposals and sites within the next 18 months. Each bond-funded project in Hillsboro will be required to provide a share of 30% AMI and/or two-bedroom plus-sized units in order to meet the production targets outlined in the LIS.

## 2. RACIAL EQUITY DEVELOPMENT METRICS

The following metrics reflect preliminary cost estimates and development plans. These figures will be updated as projects are refined during the planning process. Note that metrics related to total cost take into account all units within a project, whereas metrics related to bond subsidy only consider bond eligible units.

**Table 2a: Location/access**

Project	Location (Address)	Within ¼-mile of frequent service bus?	Within ¼-mile of non-frequent service bus?	Within ½ mile of MAX?	Within 1/3 mile of park or green space?	Walkscore
Nueva Esperanza	550 NE 53rd Ave	No	No	Yes	Yes	28
% of projects that meet criteria:		0%	0%	100%	100%	
Proximity should be calculated using the "walk" function in Google Maps. <a href="https://www.walkscore.com/">https://www.walkscore.com/</a>						Average walkscore: 28

**Table 2a: Location/access (continued)**

Project name	Notes: Describe access to other amenities, including schools and groceries.
Nueva Esperanza	The new Hidden Creek Community Center and the existing 53rd Avenue community park campus are directly adjacent to the site. To the east of the site are existing single and multi-family neighborhoods and the parks maintenance facility. Light industrial uses are to the north. High frequency light rail transit at the Hawthorne Farm MAX station is ½ mile north of the site and Bus #47 on Baseline road is ½ mile to the south. Additional open space and recreational areas are within walking distance east and west of the site. A neighborhood commercial district, including a pharmacy and medical office are within walking distance.

**Table 2b: Equitable Contracting**

Project name	General contractor	Contracting goal*	
		% total hard costs to be awarded to COBID firms (required metric)	% total soft costs to be awarded to COBID firms (optional metric)
Nueva Esperanza	LMC	20%	NA

\* For projects that have a 'minimum' and 'aspirational' goal, please report the minimum goal.

**Notes for Table 2b: Please provide interim progress for projects that are under construction. If you have additional contracting goals, please note them here.**

The City has purchased diversity contracting management software, B2GNOW, for use by the City and development team to track MWESB-DV contracting goals and outcomes, including contracting dollars. The developers and general contractor will also be reporting outreach and mentoring efforts with minority-owned businesses and success stories in narrative form.

**Table 2c: Prevailing Wage**

Project name	Prevailing wage - Davis Bacon, BOLI
Nueva Esperanza	No

**Table 2d: Workforce Participation (if applicable/tracked)**

Project name	Workforce Tracking (Y/N)	Goal for % of total work hours worked by apprentices (optional)	Goal for % of total hours worked by women (optional)	Goal for % of total hours worked by POC (optional)
Nueva Esperanza	No	N/A	N/A	N/A

**Notes for Table 2d: Please provide additional summary information regarding project-level strategies and goals, and interim progress if available.**

While percentage workforce participation goals and formal tracking are not included in this first bond project, the Nueva Esperanza development team will be informally tracking workforce participation and reporting successes on a narrative basis.

**Describe progress toward implementing your LIS strategies for advancing racial equity. In addition to data provided in the above tables, feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you'd like to highlight. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

From the focus on the amenity-rich 53<sup>rd</sup> Ave site repurposed for affordable housing, to setting MWESB-DV contracting goals, to employing affirmative marketing and low-barrier screening criteria, and selecting a culturally-based developer for the first project, the City of Hillsboro has led with racial equity in implementing its LIS.

- a. How locations of selected projects supported the location strategy described in your LIS, including proximity to parks/green space/trails, public elementary/middle/high schools, other types of schools, and groceries*

As a former parks site, repurposed by the City for affordable housing, the 53<sup>rd</sup> Ave site offers outstanding and unparalleled access to parks, green space, fields, courts and unique amenities. The site is directly adjacent to the 53<sup>rd</sup> Ave parks campus with soccer fields, tennis courts, basketball courts and open spaces. The property is directly across 53<sup>rd</sup> Ave from the brand new Hidden Creek Community Center which offers indoor, year-round access to fitness programs, a full gym, community spaces and much more. The City is also planning an all-inclusive playground for community members with physical disabilities just across the street from the project!

The project location is 1 ½ mile from Quatama and Orenco Elementary Schools and just less than 3 miles from Poynter Middle and Century High schools. It is walking distance (½ mile) to Insomnia coffee shop, restaurants, a pharmacy and medical office. It is also a ½ mile walk to the Hawthorne Farm Max station to the north and a high frequency bus stop to the south. For all of these reasons and others, the Nueva Esperanza project site has unique and convenient amenities and will be an excellent future home for low and very-low income families of color.

- b. How selected projects have incorporated or are incorporating strategies for fair housing*

Bienestar and Housing Development Center (HDC), the selected developers of Nueva Esperanza, with partnership and support from the City, will take an affirmative and proactive approach to fair housing and creating equitable opportunities for tenancy. As a longtime developer, owner and operator of affordable multifamily properties in Washington County, Bienestar serves Hillsboro's largest and most at-risk population of color: Latinx farmworkers and working families, to ensure even the most financially disadvantaged in our community have access to quality homes (all Bienestar units are reserved for 60% percent AMI or below). Management will not deny an applicant for negative rental history or prior evictions if it was based on excessive rent burden. Additionally, Bienestar's criminal conviction review process has removed any crimes that are no longer illegal at the State or Federal level. Applicants will be encouraged to provide professional letters to assist in the review process. For every aspect of the screening criteria, Bienestar and Cascade will consider relevant individualized evidence of mitigating factors, and approach each review through the lens of proactive fair housing and equity.

Likewise, affirmative marketing strategies will be employed for Nueva Esperanza lease up. Bienestar, HDC, and partners will create and carry out a comprehensive, multi-lingual marketing and lease-up plan that ensures racial and economic equity is achieved, that all classes of disadvantaged populations will have equal and fair access to units and that the project is furthering affordable housing choice in Hillsboro. This will entail distributing multi-lingual marketing materials through partnerships with the Racial Equity Collaborative, the Hillsboro School District, the Immigrant Solidarity Collaborative, the Somali Empowerment Circle, Adelante Mujeres, and others to ensure that information is distributed to other communities of color in the area, and will produce leasing and other informative materials in other languages as needed, including Somali, Arabic, Slavic, Vietnamese and Tagalog. It will also entail leveraging Bienestar’s peer and community based networks for direct referrals, in-person outreach and community meetings. The City and developers will work to ensure that Nueva Esperanza serves not only Latinx populations, but other communities of color including African American, Asian, Somali and other community members in need. This will require deliberate multi-cultural marketing and close partnerships with the community-based organizations described above, amongst others.

*c. Outcomes or project-level goals/commitments related to diversity in contracting and hiring*

The City of Hillsboro in its LIS has set an aspirational goal that 20% of *total project costs* for each and every bond-funded project be awarded to COBID-certified MWESB-DV firms. For Nueva Esperanza, this aspirational goal is considered the minimum “floor” by the development team. The development team of Bienestar/HDC, LMC Construction, Scott Edwards Architects and Cascade Management has included their own aspirational goal of 35% MWESB-DV participation in the project. The City has purchased contact tracking software to help audit and confirm the development team’s reporting on this issue. As stated above, the developers and general contractor will also be reporting outreach and mentoring efforts with minority-owned businesses and success stories in narrative form and will include informal workforce utilization reporting.

*d. Outcomes or project-level plans to align culturally specific programming and supportive services to meet the needs of tenants.*

The framework for the resident services plan at Nueva Esperanza is to address residents’ individual barriers to housing stability, foster and promote a rich sense of community and inspire residents to build assets and seek new opportunities. Bienestar’s resident services program centers on the *Promotores* model, which empowers low-income community members while also providing culturally specific outreach and information and referral services to hard-to-reach communities. Bienestar recruits residents from each property to become key liaisons to Bienestar staff for service provision. These “connectors” serve the community through home visits, assessing needs and connecting residents to crucial services, while at the same time acting as empowered advocates on critical community issues. The Promotores selected will reflect Nueva Esperanza’s diverse population and provide culturally specific and linguistically appropriate services to diverse households.

Bienestar will offer culturally specific resident services in both Spanish and English, provided by bilingual and bicultural resident services staff. Partners such as APANO and the Somali Empowerment Circle will support translation of materials into languages other than Spanish, when necessary.

Bienestar will also leverage a wide array of services for residents through strong partnerships with more than 10 community-based organizations, including Virginia Garcia Memorial Health Center, Community Action, Centro Cultural, Adelante Mujeres, multiple departments of the City of Hillsboro, Washington County and others. Services provided by the partners include eviction prevention counseling, financial literacy, homeownership support, credit building, youth and family summer enrichment activities, health and education workshops, energy assistance and other services relevant to residents.

### 3. COMMUNITY ENGAGEMENT

**Describe your progress toward implementing your LIS strategies for ongoing community engagement (appx 750 words). Where possible, please incorporate engagement data/metrics describing the number of people/organizations engaged and demographics, if available. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

Starting with the outreach and engagement with communities of color and culturally-based organizations in development of Hillsboro's LIS, through the community engagement with impacted communities to provide input on the design, services and access to Nueva Esperanza – public involvement has been a cornerstone of the City's efforts to implement Hillsboro's LIS. Ongoing community engagement for both the project and Hillsboro's LIS will continue in 2021.

- a. *Number of people engaged, including (where possible) demographic breakdown that shows participation of communities of color and other marginalized community members (please do not share names or other identifying information)*

Over 40 people were directly engaged by the development team to help shape the Nueva Esperanza project proposal. Of these about 10% identified as Somali, over 40% as Latinx, with Asian and White/Angelo populations also represented.

- b. *Number of partnerships with community-based organizations, and outreach strategies used to encourage participation and mitigate barriers*

The partnerships with community organizations leveraged for the Nueva Esperanza project thus far have been largely described in the above sections regarding affirmative marketing and resident services. In summary, the development team has established relationships and partnerships with over 10 community-based agencies including Somali Empowerment Circle, African American Alliance for Home Ownership, Adelante Mujeres, Virginia Garcia, APANO, Community Action and others. A majority of these relationships predated the project proposal due to Bienestar's longevity in the community and participation in regional forums like the Racial Equity Collaborative and Immigrant Solidarity Collaborative mentioned previously. Especially during lock-down conditions amidst the pandemic, these pre-existing, long-established relationships are key to the success of future collaboration on the project, as are the new relationships with diverse community-based organizations. These partnerships resulted in important feedback that has been incorporated in ways described below.

- c. *Summary of engagement themes/feedback*

Feedback from Somali and Latinx communities in particular included the perspectives of finding it very difficult for community members to find much needed 4 bedroom units within the area, and that the Somali community is similar to the Latinx community in that they often

have multi-generational households and at times have large families. APANO also confirmed the need for larger family-sized units in affordable housing developments in the Vietnamese, Chinese and Filipino communities.

Other feedback emphasized the need for neighborhood connectivity, community spaces and amenities to meet, in some cases, culturally-specific needs. One example is the Somali community's suggestion that not all units have open floor plans but instead provide separated kitchen areas which reflect their culture around food preparation.

*d. Themes in how feedback directly informed project implementation and outcomes (emphasis on feedback from communities of color and other marginalized groups)*

The *Nueva Esperanza* project was explicitly conceived within the framework of racial equity and incorporates direct feedback from communities of color. The project's core principle is to build a community in which residents will interact with their neighbors and offer ample opportunities for exercise, relaxation and culturally-relevant social engagement. The focus on family-sized units at Nueva Esperanza, including 4 bedroom units, is a foundational integration of the feedback from communities of color. Giving a unique cultural identity to the property is another critical component. Since Bienestar anticipates that a large percentage of residents will be Latinx and/or immigrant, the development team intentionally created a distinctive neighborhood feel within the development. The project layout, with multi-story units and interconnecting footpaths surrounding three separate plazas, is an arrangement that mimics the community building grid of town centers found throughout Latin America, East Asia, Africa, and Europe -- places where many members of our communities originated or still maintain cultural and family ties.

Culturally-specific amenities that honor tradition and identity have been added to the design. After collecting feedback from community members via a Project Advisory Committee, Bienestar added thoroughfares that will connect the surrounding community to the property and increase an atmosphere of inclusivity and broader camaraderie. The design created communal space for family celebrations where piñatas can be hung and gatherings hosted, including a place for residents to practice their dancing for upcoming *quinceañeras*. The team will also provide boot washing stations so that residents who do agricultural labor can wash away pesticides and other hazards before coming home to their families. These are but a few of the examples where thoughtful consideration of community feedback, particularly from impacted communities of color, has been integrated into the project.

## ATTACHMENT A: SHS INTEGRATION ADDENDUM

- a. Please describe your anticipated strategy or strategies for integrating SHS funds into your Housing Bond implementation strategy. Possible approaches may include:
  - b. Increase capital construction by utilizing SHS funds for rental assistance/operating subsidy to meet existing 30% AMI unit goals and increase production of 60% AMI units;
  - c. Increase the number of 30% AMI units by leveraging SHS funds to exceed the minimum goal for deeply affordable units;
  - d. Prioritize supportive housing by leveraging SHS funds to provide supportive services to units created through the housing bond;
  - e. A combination to the above;
  - f. No change in production or affordability targets; plan to use SHS funds only for rental assistance to fill identified operating gaps as modeled by Metro; or
  - g. No change in production or affordability targets; no use of SHS funds.

**1. Please complete the below tables describing your anticipated approach or approaches for all approved bond projects and for remaining bond funds not yet committed.**

### Existing Projects with Concept Endorsements or Final Approval

Project Name	Approach(es) (see above options)
Nueva Esperanza	C, E

### Remaining Bond Funds

Project or solicitation name (use multiple rows if multiple approaches will be used to select projects for remaining funds – or just list “all remaining funds” if only one approach will be used)	Approach(es) (see above options)
All remaining funds	C, E

**2. Provide a brief narrative (500 word max) describing the rationale for these approaches and how you arrived at them. As relevant, you may wish to include description of financial modeling and policy considerations that have helped to inform your approach.**

As indicated in the annual report narrative, Hillsboro will encourage and facilitate selected developers/projects to explore use of SHS funds for both supportive housing and rent assistance functions.

The City of Hillsboro is not eligible to receive direct funds from the Supportive Housing Services Levy. City staff is represented on the Washington County SHS Local Implementation Plan (LIP) Committee and has actively participated in the planning dialogue for Washington County's utilization of their allocation of SHS funds, including providing references to and encouragement for alignment with Regional Housing Bond implementation. Due to the very early stage of the LIP work at the County level, the fact that no dollar amounts for supportive housing have yet been allocated by the County, and based on conversations with the selected developers for Nueva Esperanza, Options C and E of exploring Bienestar/HDC use of SHS dollars to provide supportive services as well as rent assistance at the Nueva Esperanza project is the most prudent and appropriate approach at this time.

As Washington County's LIP plan develops, and SHS funding is made available within the County for supportive housing services, rent assistance and other programs, the City will continue to facilitate dialogue and coordination with affordable housing developers implementing housing bond-funded projects in Hillsboro.

# Housing Bond Progress Report for City of Beaverton | 2020

*The purpose of this report is to summarize Portland's progress toward implementing the strategies in its approved Local Implementation Strategy (LIS), for consideration by Metro's Affordable Housing Bond Community Oversight Committee.*

## 1. PROJECTS UNDERWAY

As of the end of December 2020, the City of Beaverton has two projects underway. These projects represent 303 new affordable homes, or 139% of Beaverton's total production target for the Housing Bond, while using just 39% of its allocated \$31,140,595 in funding.



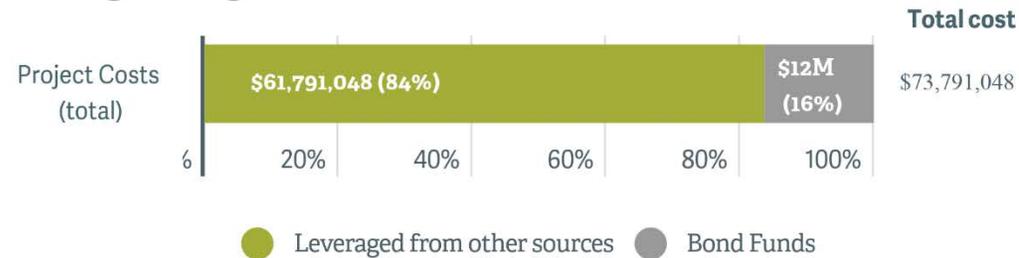
Of the homes created, 198 will have 2 or more bedrooms, representing 182% of its target for family-size homes; and 31 will be affordable to households with incomes at or below 30% of area median income (AMI), representing 35% of their Housing Bond target for deeply affordable homes.

**Table 1a: Summary of projects underway**

Project	Developer	Metro Bond Funds	Total Project Cost	Status	Anticipated ground-breaking date	Anticipated construction completion date
				<i>concept, final, construction, completion</i>		
The Mary Ann	REACH	\$ 3,000,000	\$ 21,867,324	construction	Summer 2020	5/1/2021
South Cooper Mountain Apartments	Wishcamper Development Partners	\$ 9,000,000	\$ 51,923,724	concept	Summer 2021	12/1/2022
Total committed or underway		<b>\$ 12,000,000</b>	<b>\$ 73,791,048</b>			
Total percentage committed or underway		<b>39%</b>				

*Shading indicates a Phase 1 project*

**Amount of funding leveraged from other sources**

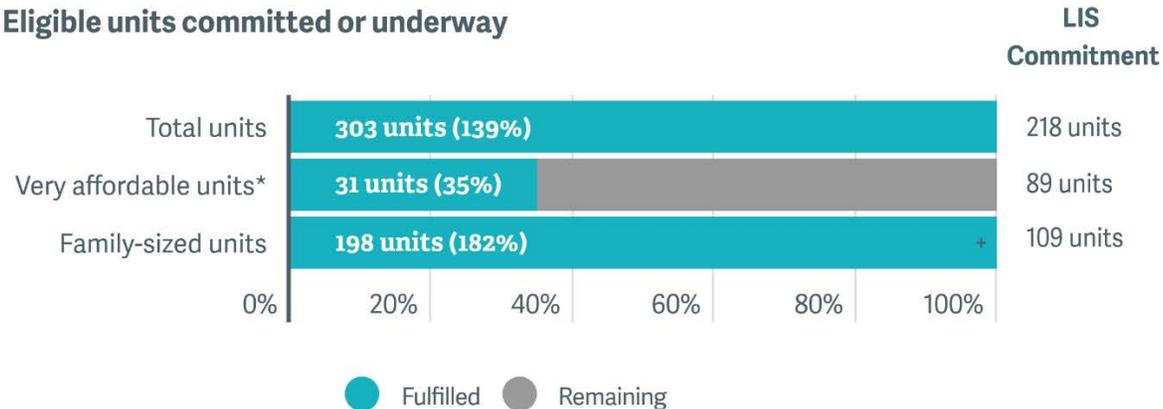


**Table 1b: Unit production**

Tallies include **only** bond-eligible units; manager units or other non-bond funded units are not included in these counts.

Project	Total units	30% AMI units	2+ BR units	30% AMI and 2+ BR units	61-80% AMI units <i>(should be no more than 10% of total units)</i>	# of Project-based Vouchers
The Mary Ann	54	11	29	7	0	8
South Cooper Mountain Apartments	249	20	169	TBD	60	0
<b>Total committed or underway</b>	<b>303</b>	<b>31</b>	<b>198</b>	<b>7</b>	<b>60</b>	<b>8</b>
LIS Commitment	218	89	109	N/A	N/A	0
% of commitment fulfilled	139%	35%	182%	N/A	N/A	N/A
Remaining to achieve local targets	-85	58	-89	N/A	N/A	N/A

**Eligible units committed or underway**



\*refers to households at 30% Area Median Income (AMI)

**Narrative 1: Referencing the data above, provide a narrative (appx. 750 words) describing progress toward implementing the development plan in your LIS. Feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you'd like to highlight. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. *Description and results of competitive selections, including who was involved and how LIS criteria were applied and impacted the outcome.*
- b. *Cost containment strategies.*
- c. *Leveraged capital and ongoing operating funding.*
- d. *Approach(es) to aligning resident or supportive services.*
- e. *Plans, strategies and anticipated timelines for achieving remaining unit production targets (total, 30% AMI, 2+ bedrooms).*

The City of Beaverton elected to use a portfolio approach to achieve established production goals. In addition, priority was placed on leveraging publicly owned properties. The tables below represent the original portfolio model and the current estimates based on updated project expectations.

**BEAVERTON PORTFOLIO MODEL**

Project	2+ Bd	30% AMI	PBV	Total Units
The Mary Ann	29	11	8	54
Elmonica	37	28	9	79
Project C	42	38	16	66
Project D	6	12	2	51
<b>Total</b>	<b>114</b>	<b>89</b>	<b>35</b>	<b>250</b>
<b>Metro Target</b>	<b>109</b>	<b>89</b>	<b>n/a</b>	<b>218</b>

**BEAVERTON PORTFOLIO ACTUAL (1-06-2021)**

Project	2+ Bd	30% AMI	PBV	Total Units
The Mary Ann	29	11	8	54
Elmonica	37	28	9	60
Project C	0	38	18	66
South Cooper Mt	169	20	0	249
<b>Total</b>	<b>235</b>	<b>97</b>	<b>35</b>	<b>429</b>
<b>Metro Target</b>	<b>109</b>	<b>89</b>	<b>n/a</b>	<b>218</b>

The City's commitment to diversity, equity and inclusion beyond the Metro Affordable Housing Bond development led to the creation of the Housing Technical Advisory Group (HTAG), a committee made up of City of Beaverton residents to review, advise and inform affordable housing projects and policies, including Metro Affordable Housing Bond projects. The city has also partnered with Unite Oregon for purposes of engaging marginalized communities and people of color. This partnership includes the creation of a housing cohort for the purposes of educating about affordable housing and sharing information with leaders in the communities they represent. The first meeting of the Beaverton Inclusive Housing Cohort is in January 2021. The city has also established partnerships with Professional Development Business Group (PDBG) and LatinoBuilt, two trade associations with the mission to increase minority and women owned contractors in the construction industry. To track people of color and women owned contractor participation in the construction of affordable housing projects, the city created a web-based tracking system. This new system is tracking participation on The Mary Ann project successfully. These relationships, partnerships and the tracking tool will help expand the city's outreach beyond its established channels with the goal of a more inclusive participation at all levels of government, from civic participation, construction, community feedback, access to housing, etc.

Below are brief Metro Affordable Housing Bond project summaries.

### **The Mary Ann**

This First Phase project by REACH CDC broke ground in June 2020 and it is expected to be completed in fall/winter 2021. The project is expected to exceed the 20% COVID-certified subcontractor and professional services participation. Also, the screening criteria was modified to allow potential tenants previously prevented from benefiting from affordable housing units. The lease up process will start in the fall of 2021 and city staff will be actively engaged in the lease up process to ensure increased accessibility to new units.

### **South Cooper Mountain Apartments**

Originally identified at Project D, Wishcamper Development Partners' (WDP) South Cooper Mountain (SCM) project was selected in June 2020 via a solicitation process. The selection included an internal review comprised of staff from the City of Beaverton, Washington County and Metro. A summary of the internal review was provided to a 5-member Selection Committee comprised of subject matter experts with interest in the City of Beaverton. Developers presented their proposals to the Selection Committee, which deliberated and selected a project to be recommended for funding once the presentations were completed. This recommendation was presented to HTAG and the City's Real Estate Committee for their review and feedback.

WDP originally proposed a 164-unit project; since being selected, they have been able to secure the adjacent site and thereby increase the number of units to 309, increasing the number of 30% AMI units from 12 to 20 and 60 units proposed at 70% AMI. For the purposes of tracking to Metro established goals, the city will not be tracking the 70% AMI units, hence the project is identified as a 249-unit project in this report. The project is expected to begin construction in the summer of 2021, with completion expected in the fall/winter 2022. WDP has selected Colas Construction, Inc. as the project's General Contractor. Colas Construction, Inc. is a second-generation Black-owned family company.

### **Elmonica**

Over the past year Metro and city staff have been working on making the Metro-owned site located at the corner of SW 170<sup>th</sup> and Baseline available for development. To that end, in November 2020, Metro issued a joint Request for Qualification (RFQ), with proposals due January 15. The developer is expected to be selected by June 2021 and begin the land use, permitting and financing process.

### **Project C**

Being the deepest affordable project in the portfolio and the need to leverage a city-owned property, this project requires multiple phases. The first phase of the project, site selection, is currently under way with public discussion via City Council work sessions. The project's second phase is developer solicitation which is expected to happen in first quarter of 2021, with developer selection in summer 2021.

## 2. RACIAL EQUITY DEVELOPMENT METRICS

The following metrics reflect preliminary cost estimates and development plans. These figures will be updated as projects are refined during the planning process. Note that metrics related to total cost take into account all units within a project, whereas metrics related to bond subsidy only consider bond eligible units.

**Table 2a: Location/access**

Project	Location (Address)	Within ¼-mile of frequent service bus?	Within ¼-mile of non-frequent service bus?	Within ½ mile of MAX?	Within 1/3 mile of park or green space?	Walkscore
South Cooper Mountain Apartments	17811 SW Scholls Ferry Rd, Beaverton, OR 97007	No	No	No	No	4
The Mary Ann	4605 SW Main Ave, Beaverton, OR 97005	Yes	Yes	Yes	Yes	93
% of projects that meet criteria:		50%	50%	50%	50%	
Average walk score:						48.5

*Proximity should be calculated using the "walk" function in Google Maps.*

<https://www.walkscore.com/>

Project name	Notes: Describe access to other amenities, including schools and groceries.
South Cooper Mountain Apartments	According to TriMet, line 56 will be extended to the site within two years. The apartments are also located within walking distance of Mountainside High School.
The Mary Ann	The Mary Ann is within easy walking distance of Beaverton High School, which offers a school based health clinic onsite. The Mary Ann is also within walking distance of multiple eating & drinking establishments and grocery stores.

**Table 2b: Equitable Contracting**

Project name	General contractor	Contracting goal*	
		% total hard costs to be awarded to COBID firms (required metric)	% total soft costs to be awarded to COBID firms (optional metric)
South Cooper Mountain Apartments	Colas Construction, Inc.	20%	20%
The Mary Ann	Walsh	20%	20%

\* For projects that have a 'minimum' and 'aspirational' goal, please report the minimum goal.

**Notes for Table 2b: Please provide interim progress for projects that are under construction. If you have additional contracting goals, please note them here.**

The Mary Ann is expected to achieve at least 23% COBID-certified firms in construction as well as 23% in COBID-certified firms in soft costs. The project is currently under construction, therefore final numbers and reports are not yet available. Wishcamper Development Partners (WDP) South Cooper Mountain apartments recently selected Colas Construction, Inc. as the project’s general contractor. WDP is also working with Professional Development Business Group and Ozzie Gonzales (P3 Consulting) to maximize the impact and participation of the project’s social, equity and environmental goals.

**Table 2c: Prevailing Wage**

Project name	Prevailing wage - Davis Bacon, BOLI
South Cooper Mountain Apartments	No
Mary Ann	No

Project name	Workforce Tracking (Y/N)	Goal for % of total work hours worked by apprentices (optional)	Goal for % of total hours worked by women (optional)	Goal for % of total hours worked by POC (optional)
South Cooper Mountain Apartments	Yes	n/a	n/a	n/a
The Mary Ann	Yes	n/a	n/a	n/a

**Notes for Table 2d: Please provide additional summary information regarding project-level strategies and goals, and interim progress if available.**

While the City of Beaverton does not have quantitative apprentice goals, we will be tracking apprentice participation to better understand participation and potential challenges with apprentice participation.

**Describe progress toward implementing your LIS strategies for advancing racial equity. In addition to data provided in the above tables, feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you'd like to highlight. 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, including proximity to parks/green space/trails, public elementary/middle/high schools, other types of schools, and groceries*
- b. How selected projects have incorporated or are incorporating strategies for fair housing*
- c. Outcomes or project-level goals/commitments related to diversity in contracting and hiring*
- d. Outcomes or project-level plans to align culturally specific programming and supportive services to meet the needs of tenants.*

The City of Beaverton Local Implementation Strategy (LIS) included leveraging three publicly owned sites, The Mary Ann, Elmonica and Project C. These three sites are in areas near mass transit, schools and other amenities. The South Cooper Mountain project is in an emerging area next to a new high school, green space and highly valued homes with no affordable housing nearby. During the city's LIS community engagement process, emerging needs included the following:

- Lower barrier access to housing
- Senior housing
- Family-sized housing
- Housing accessibility for seniors and non-abled body residents

We are currently projecting exceeding the number of family-sized and deeply affordable (30% AMI) units. Project solicitations include universal design and strategies to lower screening criteria requirements.

For description of amenities near the Mary Ann and South Cooper Mountain, see tables on previous two pages.

The Mary Ann is the only project under construction, hence there are nothing to report regarding outcomes or Fair Housing principles at this stage.

### 3. COMMUNITY ENGAGEMENT

Describe your progress toward implementing your LIS strategies for ongoing community engagement (appx 750 words). Where possible, please incorporate engagement data/metrics describing the number of people/organizations engaged and demographics, if available. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:

- a. *Number of people engaged, including (where possible) demographic breakdown that shows participation of communities of color and other marginalized community members (please do not share names or other identifying information)*
  - a. **The Mary Ann** – The community engagement completed for the Mary Ann is all incorporated into Beaverton LIS because it was our first project and much of the planning happened prior to the completion and adoption of the LIS. That said, I’ve copied and pasted the relevant demographics from the LIS that informed strategies for the Mary Ann (particularly the emphasis on family housing).
    - i. Listening session was held on March 31 was completed in partnership with Habitat for Humanity and focused on Habitat clients. This was the most diverse audience of all presentations. Attendees represented recent immigrants, longtime residents, multiple nationalities, different age groups, and multiple ethnicities and races. **Of the 23 attendees, 22 identified as either Hispanic, Asian, or African and there was an even split in gender of attendees.**
    - ii. At the request of an Iraqi community member, the listening session held on April 19 focused on the Arabic community. Two members from that community promoted the event, translated the materials and guided group discussions. **Of the eleven attendees, all identified as Arabic or North African.**
    - iii. In partnership with the City’s Planning team and the Beaverton School District, staff held a listening session at Beaverton High School’s Latino Night on April 24. City staff conducted this event in Spanish to better connect with the audience. **Of the thirteen attendees who filled out the survey, all identified as Latinx or Hispanic.**
    - iv. The Community Conversation held April 4 was directed at the community. The April 4 event relied on group discussions facilitated by members of the Beaverton Committee for Community Involvement (BCCI). This event was supplemented by an open house on May 16, designed as a follow-up opportunity for those who attended the April 4 listening session and for those who have not provided feedback yet. The open house format provided an informal opportunity for staff to greet and interact with attendees, while continuing to build community trust and close the feedback loop. At both events open to the public, attendees included senior residents and people with disabilities who expressed the challenges of making ends meet on a fixed income. **Of the 39 attendees who filled out the survey 26 identified as White, ten identified as Latinx, one as Middle Eastern, one as African, and one as unsure.**
    - v. In addition, the City attended a variety of other meetings and events including City boards and commissions. Committees such as the Diversity Advisory Board (DAB), Human Rights Advisory

Commission (HRAC), Beaverton Committee for Community Involvement (BCCI), and Beaverton Committee on Aging, provided first-hand knowledge of their housing experience and insight on the best outreach and engagement methods to reach the diverse Beaverton population. 40% of people serving on a Beaverton board or commission are a person of color, but we do not have a specific race/ethnic breakdown of any of these groups. A majority of the members of DAB and HRAC are people of color. The Beaverton Committee on Aging is made up of a combination of community members with direct experience with seniors and people with disabilities either in their personal or professional experiences.

- vi. Through opportunities detailed above, the City of Beaverton was able to hear feedback from **over 200 people. Sixty-nine percent of those who attended feedback events were people of color**, where demographic information was provided.
- b. **South Cooper Mountain** – limited community engagement has occurred for this project and more is expected in the Spring/Summer. The Beaverton Housing Technical Advisory Group (HTAG) was the first group consulted and the newly formed Beaverton Inclusive Housing Cohort will be an integral component of their community engagement in the Spring. The limited demographic information staff have access to about both groups are below:
  - i. HTAG: 9 total participants, 5 of which identify Black, Indigenous, or Person of Color. The group also has representation from members of the Domestic Violence survivor community, and residents of senior affordable housing and a broad range of ages.
  - ii. Beaverton Inclusive Housing Cohort: 10 total participants, all of which identify as Black, Indigenous, or a Person of Color. See table below.
  - iii. Wishcamper has also partnered with P3 Consulting to support community engagement and communication efforts.

Participant	Gender	Race/Ethnicity	Housing Situation
1	Non-Binary	American Muslim	Rent in Public Housing with Section 8 Voucher
2	Female	Hispanic	Own
3	Male	Black/African American	Staying with family
4	Female	Thai	Unknown
5	Female	Latinx	Unknown
6	Female	Latinx	Unknown
7	Female	Latinx	Unknown
8	Female	Latinx	Unknown
9	Female	Somali	Rent
10	Male	Pakistani American	Own

- b. *Number of partnerships with community-based organizations, and outreach strategies used to encourage participation and mitigate barriers*
- i. Potential partnership with Washington County for engagement on affordable housing in South Cooper Mountain (Washington County is contracting with PKS International)
  - ii. Currently contracting with Unite Oregon through June 2021 and anticipating extending agreement for an additional two years to provide multicultural engagement on bond projects and general housing education and engagement.
  - iii. Beaverton School District Latino Night – Ongoing partnership with this school based organization for Latino parents in the Beaverton School District. The City of Beaverton offered a separate Fair Housing Training to this group just prior to the shutdown of in person services in March 2020.
  - iv. Iraqi Community of Oregon (ICO) participants Eman Abbas and Aras Dezay have facilitated multiple Metro Affordable Housing Bond engagement events for the City of Beaverton and have also partnered with the city to provide Fair Housing training and rent assistance outreach and referrals.
  - v. Habitat for Humanity – this partnership was instrumental in hosting engagement events.
  - vi. Outreach strategies used to encourage participation and mitigate barriers have focused on partnering with community leaders to provide their expertise (Unite, ICO, Latino Night, etc.) in reaching folks where they are at. The City has also used translation and interpretation of materials and emphasized building long term relationships with critical organizations to deepen these partnerships,

- c. *Summary of engagement themes/feedback*
  - a. The summary of feedback shared for the Mary Ann engagement can be found in the Beaverton LIS from pages 33-36. Briefly, high level themes that rose to the top included a need for larger family sized units (3 bedroom and larger), particularly during engagement with the Latinx and Arabic community. Community members also focused on barriers to affordable housing such as cost, screening criteria, and navigating a complex system. A desire for educational opportunities, coordination of services onsite, and case management were also expressed by communities engaged by the City of Beaverton as well as engagement completed in partnership with Washington County. Finally, an emphasis on location with access to services, transit, and safety were prioritized.
  - b. Wishcamper has just begun to complete engagement for their project, so themes in this project are to be determined.
- d. *Themes in how feedback directly informed project implementation and outcomes (emphasis on feedback from communities of color and other marginalized groups)*
  - a. The Mary Ann has focused on families in their project design and implementation, which was a significant theme amongst communities of color. The Mary Ann has also shifted their screening criteria (detailed earlier in this report) to be more accessible to potential residents. In terms of location, the Mary Ann is a great example of a project located near many of the amenities and services communities listed as important.
  - b. While it is too early to see the impact of community engagement on project implementation for South Cooper Mountain, the desire from Wishcamper staff to incorporate community feedback and develop a project using an equity lens is evident in their other projects. City staff are working with Wishcamper to help them be successful in their community engagement.

## ATTACHMENT A: SHS INTEGRATION ADDENDUM

Please describe your anticipated strategy or strategies for integrating SHS funds into your Housing Bond implementation strategy. Possible approaches may include:

- a. Increase capital construction by utilizing SHS funds for rental assistance/operating subsidy to meet existing 30% AMI unit goals and increase production of 60% AMI units;
- b. Increase the number of 30% AMI units by leveraging SHS funds to exceed the minimum goal for deeply affordable units;
- c. Prioritize supportive housing by leveraging SHS funds to provide supportive services to units created through the housing bond;
- d. A combination to the above;
- e. No change in production or affordability targets; plan to use SHS funds only for rental assistance to fill identified operating gaps as modeled by Metro; or
- f. No change in production or affordability targets; no use of SHS funds.

1. Please complete the below tables describing your anticipated approach or approaches for all approved bond projects and for remaining bond funds not yet committed.

### Existing Projects with Concept Endorsements or Final Approval

Project Name	Approach(es) (see above options)
The Mary Ann	c
South Cooper Mountain Apartments	b, c

### Remaining Bond Funds

Project or solicitation name (use multiple rows if multiple approaches will be used to select projects for remaining funds – or just list “all remaining funds” if only one approach will be used)	Approach(es) (see above options)
Elmonica	d
Project C	d

**2. Provide a brief narrative (500 word max) describing the rationale for these approaches and how you arrived at them. As relevant, you may wish to include description of financial modeling and policy considerations that have helped to inform your approach.**

The City of Beaverton understands the importance of linking Metro Affordable Housing Bond funds with Supportive Housing Services to help households experiencing housing instability. Supportive services are crucial to stabilize households; it the City's goal to ensure appropriate mental/addiction/health services are consistently provided in order to keep and preserve chronic homeless households in Permanent Supportive Housing. To achieve this goal, city staff is an active participant in the Washington County Local Implementation Plan (LIP) Advisory Committee.

REACH CDC's The Mary Ann, one of the four affordable housing projects partially funded with Metro Affordable Housing Bonds, is currently under construction and expected to begin leasing activities in late 2021. It is our expectation that the LIP will provide an option for projects coming online to access supportive services and that REACH CDC is able to classify some of the deeply affordable units as Permanent Supportive Housing units.

Elmonica is currently going through the solicitation process and since there is a large number of deeply affordable units (28) it is expected that proposals will include connections with SHS funds

Project C has the largest number of 30% units (38); therefore, connections with SHS via rent assistance and supportive services will be important for the project's success.

South Cooper Mountain will be providing higher number of 30% units (20) than originally modeled (12). Currently none of the 30% units have any subsidy such as rent assistance or project-based Section 8 vouchers. The developer may be interested in accessing rent assistance and/or supportive services for the deeply affordable units.

As Washington County's LIP plan develops, and SHS funding is made available within the County for supportive housing services, rent assistance and other programs, the City will continue to facilitate dialogue and coordination with affordable housing developers implementing housing bond-funded projects in Beaverton.

# Housing Bond Progress Report for City of Portland | 2020

*The purpose of this report is to summarize Portland’s progress toward implementing the strategies in its approved Local Implementation Strategy (LIS), for consideration by Metro’s Affordable Housing Bond Community Oversight Committee.*

## 1. PROJECTS UNDERWAY

As of the end of December 2020, the City of Portland has three projects underway<sup>1</sup>. These projects represent 371 new affordable homes, or 25% of Portland’s total production target for the Housing Bond, while using up approximately 13% of its allocated \$211,056,579 in funding.

### Resources committed



Of the homes created, 128 will have 2 or more bedrooms, representing 17% of its target for family-size homes; and 83 will be affordable to households with incomes at or below 30% of area median income (AMI), representing 14% of their Housing Bond target for deeply affordable homes.

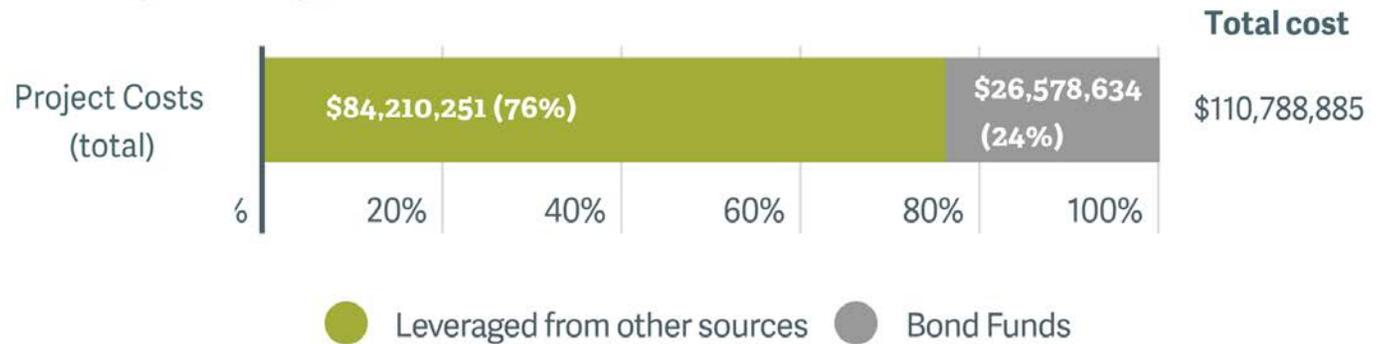
<sup>1</sup> The Dekum Court project’s units and funding count towards Portland’s allocation and production goals but reporting on metrics progress on this project will be provided by Home Forward.

**Table 1a: Summary of projects underway**

Project	Developer	Metro Bond Funds	Total Project Cost	Status	Anticipated ground-breaking date	Anticipated construction completion date
				<i>concept, final, construction, completion</i>		
RiverPlace Parcel 3	BRIDGE	\$1,739,219	\$80,233,569	Construction	21-Jan	22-Oct
Findley Commons	Home First	\$1,945,175	\$3,976,682	construction	20-Nov	21-Nov
Dekum Court	Home Forward	\$22,894,240	\$78,700,000	concept	Q3 2021	Q3 2024
Total committed or underway		<b>\$26,578,634</b>	<b>\$110,788,885</b>			
Total percentage committed or underway Total bond funding allocated		<b>13%</b>				

*Shading indicates a Phase 1 project*

### Amount of funding leveraged from other sources

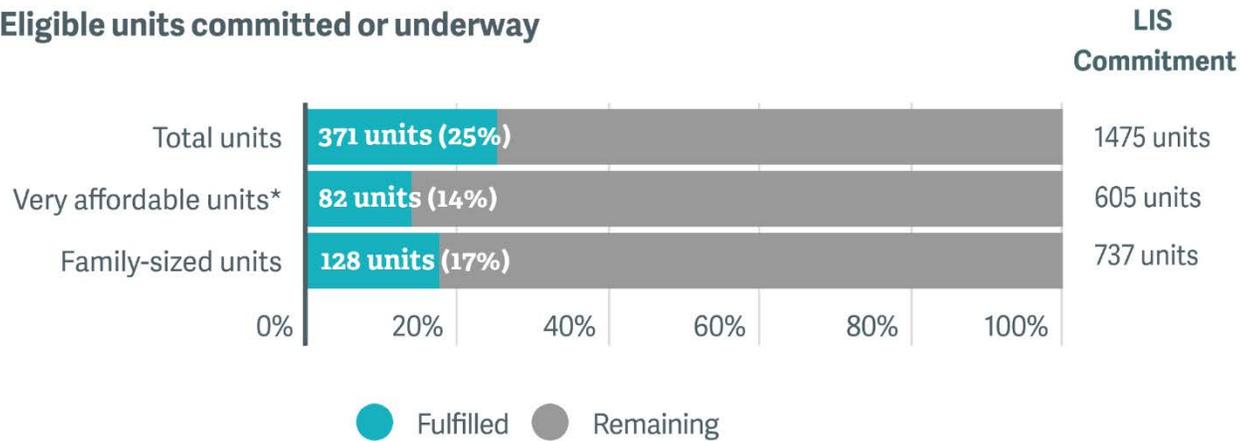


**Table 1b: Unit production**

Tallies include **only** bond-eligible units; manager units or other non-bond funded units are not included in these counts.

Project	Total units	30% AMI units	2+ BR units	30% AMI and 2+ BR units	61-80% AMI units (should be no more than 10% of total units)	# of Project-based Vouchers
RiverPlace Parcel 3	176	17	48	0	0	15 VASH
Findley Commons	35	0	0	0	0	20 VASH
Dekum Court	160	65	80	32	0	0
Total committed or underway	<b>371</b>	<b>82</b>	<b>128</b>	<b>0</b>	<b>0</b>	<b>35</b>
LIS Commitment	1475	605	737	N/A	N/A	0
% of commitment fulfilled	25%	14%	17%	N/A	N/A	N/A
Remaining to achieve local targets	1104	523	609	N/A	N/A	N/A

**Eligible units committed or underway**



\*refers to households at 30% Area Median Income (AMI)

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**Narrative 1: Referencing the data above, provide a narrative (appx. 750 words) describing progress toward implementing the development plan in your LIS. Feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you'd like to highlight. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. *Description and results of competitive selections, including who was involved and how LIS criteria were applied and impacted the outcome.*
- b. *Cost containment strategies.*
- c. *Leveraged capital and ongoing operating funding.*
- d. *Approach(es) to aligning resident or supportive services.*
- e. *Plans, strategies and anticipated timelines for achieving remaining unit production targets (total, 30% AMI, 2+ bedrooms).*

Concurrent to the final approval of Portland's IGA and LIS in September 2020, PHB submitted two "Phase 2" projects to Metro for Concept Endorsement and Final Approval. Both projects, Findley Commons and Riverplace Phase 2, were awarded PHB funding through previous competitive solicitations and met the priority populations and production targets for 30% AMI and PSH units in the LIS. Metro Bond funds provided the final gap financing at significantly less than the targeted bond subsidy per unit average of \$143,000 per unit. Collectively, these two projects contribute to Portland's production goals with 211 total affordable units, of which 17 units provide housing for households at 30% AMI and 48 units are 2 bedrooms or larger. Both projects also add 55 new units of supportive housing, representing 18% of Portland's 300-unit PSH goal, with outreach and services to support Veterans.

Prior to the approval of Portland's LIS and IGA, Metro approved a Phase 1 project. This project, Dekum Court, will be developed by Home Forward, another Local Implementation Partner. Production target goals for Dekum Court are included in this progress report, but narrative information regarding the project will be included in Home Forward's annual report. Metro Bond funds were approved to develop 160 units of affordable housing. As the project proceeds through predevelopment activities, the total unit count and mix are subject to change pending PHB and Metro approval.

#### *Cost Containment -Leverage – Progress summary*

As described in the LIS, PHB's underwriters, senior construction coordinators, closers, and legal advisors, led by an Executive Team, each play a role to monitor each stage of the development process to reduce the risk of PHB's funding exceeding the awarded amount and subsidy/unit limit. PHB's processes and protocols to oversee project development are in place to establish clear expectations with development teams, including describing the conditions of each award and actively working with teams after the award on cost

monitoring throughout predevelopment and construction. The end goal of all these processes and protocols is to ensure Bond funds will be used to support projects that will provide high quality, sustainable affordable housing for Portland’s residents.

The primary stages where cost containment measures are most effective include award, predevelopment and construction. PHB staff work closely with the developer in each stage of a project to ensure a smooth transition from design to construction. For example, Findley Commons experienced additional funding gaps resulting from increased lumber costs, a shortage of subcontractors and a change in city code. PHB staff supported the development team to implement appropriate changes to the project’s scope and proforma to minimize the overall impact to the project. Findley Commons broke ground in November 2020 to begin a 12-month construction schedule.

Riverplace Phase 2 is expected to break ground in early 2021 after its financial closing December 17, 2020. This is a larger, more complex construction project with an anticipated completion date in Quarter 3 of 2022.

The Metro Bond award of just over \$3.6 million for these “Phase 2” projects has leveraged an additional \$78.5 million in capital funds for Riverplace Phase 2 and \$5 million in capital funds and \$245,000 per annum in supportive services funding for Findley Commons. Both projects have also been awarded 20 VASH rental-assistance vouchers each.

#### *Approaches to Services*

Please refer to the attached *Metro Housing Bond and Metro Supportive Housing Services (SHS) Integration Addendum* for PHB’s approach and strategies for supportive housing services. Information on the two Metro-approved projects is below.

Impact NW will provide services to all the residents of the affordable housing at Riverplace Phase 2, with special focus on the most vulnerable, the vouchered Veterans residents and unsubsidized 30% MFI residents. Riverplace Phase 2 includes 20 PSH units. Resident services programs include early childhood and family services that emphasize child well-being, development and school readiness; youth programming that emphasizes mentoring, school success, and opportunities for youth transitioning out of foster care; resources and referral services for at-risk adults, seniors, and families; and supportive assistance for seniors and adults with disabilities so that they can maintain their independence.

Findley Commons aims to serve low-income and very-low-income residents with a preference for formerly homeless Veterans. Services will be provided by Do Good Multnomah and other partners, including the National Association of Black Veterans to provide culturally specific programming to future residents and to provide referrals for individuals in need of housing. Other services will include case management, art therapy, wellness groups, peer mentoring, drug and alcohol counseling, and employment programs. All 35 of Findley’s units are PSH, with 20 one-bedroom units supported by VASH vouchers.

#### *Next Steps – plans, strategies, timelines*

In October 2020, PHB released \$15 million of Metro Bond funds through an RFQ for Supportive Housing. The goal of the RFQ is to maximize leverage opportunities of other capital and operations resources and achieve early progress on Portland's 30% AMI and PSH production goals. PHB aims to award contingent commitments of Metro Bond funds to 3-4 projects, supporting the production of an estimated 100-125 new supportive housing units and up to 200 new affordable housing units.

Six proposals were submitted for the RFQ for Supportive Housing totaling over \$35 million in requested Metro Bond funds for 469 units of 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 RFQ and made a ranked recommendation for projects to receive a Contingent Award to the PHB Director and Commissioner-in-Charge in December 2020. Selected projects will be announced in early 2021 with final awards contingent on Metro Concept Endorsement and commitments of project financing by 12/31/21.

Starting in 2021, PHB will issue annual Metro bond solicitations that include aligned SHS program funds and supportive housing production goals. This strategy will support the production of an estimated 50-80 new supportive housing units annually until Portland's production goals have been reached.

## 2. RACIAL EQUITY DEVELOPMENT METRICS

The following metrics reflect preliminary cost estimates and development plans. These figures will be updated as projects are refined during the planning process. Note that metrics related to total cost take into account all units within a project, whereas metrics related to bond subsidy only consider bond eligible units.

**Table 2a: Location/access**

Project	Location (Address)	Within ¼-mile of frequent service bus?	Within ¼-mile of non-frequent service bus?	Within ½ mile of MAX?	Within 1/3 mile of park or green space?	Walkscore	
RiverPlace Parcel 3	2099 S River Pkwy, Portland OR 97201	Yes	Yes	Yes	Yes	73	
Findley Commons	3440 SE 54th Ave, Portland OR 97206	Yes	Yes	No	No	89	
Dekum Court	2513 NE Saratoga St., Portland OR 97212	Yes	Yes	No	Yes	59	
% of projects that meet criteria:		50%	50%	25%	25%		
						Average walkscore:	74

*Proximity should be calculated using the "walk" function in Google Maps.*

<https://www.walkscore.com/>

Project name	Notes: Describe access to other amenities, including schools and groceries.
RiverPlace Parcel 3	Project is located in South Waterfront with close access to OHSU, the Waterfront trail and Poet's Beach. Transit options provide easy access to groceries, schools and other services in Southwest and downtown Portland.
Findley Commons	Access to transit and other community amenities, including multiple city parks, a library, and grocery stores. Walkability in the area is improved by buffered sidewalks with curb-ramps, signalized crossings, and recently enhanced street lighting. The site is close to a food pantry and clothing closet on-site, via the St. Marks' Lutheran Church.
Dekum Court	

**Table 2b: Equitable Contracting**

Project name	General contractor	Contracting goal*	
		% total hard costs to be awarded to COBID firms (required metric)	% total soft costs to be awarded to COBID firms (optional metric)
RiverPlace Parcel 3	Walsh	30%	20%
Findley Commons	Beaudin	24%	20%
Dekum Court	Walsh	28%	20%

\* For projects that have a 'minimum' and 'aspirational' goal, please report the minimum goal.

**Notes for Table 2b: Please provide interim progress for projects that are under construction. If you have additional contracting goals, please note them here.**

**Table 2c: Prevailing Wage**

Project name	Prevailing wage - Davis Bacon, BOLI
RiverPlace Parcel 3	Yes (BOLI)
Findley Commons	Yes (Davis Bacon)
Dekum Court	Yes (Davis Bacon)

Project name	Workforce Tracking (Y/N)	Goal for % of total work hours worked by apprentices (optional)	Goal for % of total hours worked by women (optional)	Goal for % of total hours worked by POC (optional)
RiverPlace Parcel 3	Yes	20%	22%	6%
Findley Commons	Yes	20%	18%	9%
Dekum Court	Yes	20%	9%	20%

**Notes for Table 2d: Please provide additional summary information regarding project-level strategies and goals, and interim progress if available.**

**Describe progress toward implementing your LIS strategies for advancing racial equity. In addition to data provided in the above tables, feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you'd like to highlight. 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, including proximity to parks/green space/trails, public elementary/middle/high schools, other types of schools, and groceries*
- b. How selected projects have incorporated or are incorporating strategies for fair housing*
- c. Outcomes or project-level goals/commitments related to diversity in contracting and hiring*
- d. Outcomes or project-level plans to align culturally specific programming and supportive services to meet the needs of tenants.*

The development of Riverplace Phase 2, located in the South Waterfront/North Macadam URA, addresses both the production target, priority community and racial equity goals of the Metro Bond and Portland's LIS but also addresses goals that further other City of Portland housing strategies. Riverplace Phase 2 is located within proximity to several transit options, parks/trails along the waterfront, some schools (childcare and public charter) and convenience groceries/farmer's market in the South Waterfront neighborhood. Access to additional public and private schools, a full-service grocery and other services are easily accessible by transit. The building will also provide 60 residential and 7 commercial parking spaces for tenant use with additional access to bike parking at the adjacent building, The Vera Apartments.

The general contractor, Walsh Construction, has a strong track record of achieving the City's equity contracting goals for both hard costs and workforce development and training hours for apprenticeships and journey-level workers. The two most recent projects completed by Walsh met or exceeded the 30% goal for hard costs. Construction on the project will begin in early 2021 and more information on Walsh's progress will be available as construction commences.

To increase racially/ethnically diverse access to services at Riverplace Phase 2, Impact NW will offer low-barrier intake and assessment, supporting trust and rapport building as programs and community development get off the ground. The Affirmative Fair Housing Plan indicates that the households least likely to be an applicant and therefore in need of specialty marketing targeting are Latino, disabled and families. To overcome this, BRIDGE's property management company will engage with Latino Network, El Programa Hispano Catolico, Community Vision, Easter Seals Oregon and Metropolitan Family Service. In addition, final approval for 8 VASH voucher applications will be processed in referral order from the Department of Veterans Affairs.

Findley Commons addresses both the production target goals and priority community goals of the Metro Bond and Portland's LIS. As a 100% PSH project, Findley Commons represents 12% of Portland's 300-unit PSH goal. The focus population for Findley Commons is to serve Veterans and other single adults experiencing homelessness with a disabling condition. Project location, just off SE Powell Blvd in

the South Tabor neighborhood, provides easy access to transit and other community amenities, including multiple city parks, a library, and grocery stores. Walkability in the area is improved by buffered sidewalks with curb-ramps, signalized crossings, and recently enhanced street lighting. The site is close to a food pantry and clothing closet on-site at the adjacent St. Marks' Lutheran Church.

Home First Development, the developer and property manager, implements a Housing First model to provide stability and support for individuals and families while they establish additional resources as needed. As a property manager, Home First Development will also utilize a low-barrier model for screening applicants in order to establish a population composed of individuals demonstrating the highest and most immediate of needs, including but not limited to historically underserved and vulnerable populations such as people of color and historically marginalized groups. Affordable non-subsidized applications will be processed in order of lottery number. Accessible units will be offered first to persons with disabilities.

At the time of award, in 2018, PHB's equity contracting goals were 24% for COBID-certified subcontractors, 20% for professional services and 20% for workforce hours. Construction began on Findley Commons in November 2020. The project is on track to meet the contracting goals for hard costs and for professional services.

### 3. COMMUNITY ENGAGEMENT

**Describe your progress toward implementing your LIS strategies for ongoing community engagement (appx 750 words). Where possible, please incorporate engagement data/metrics describing the number of people/organizations engaged and demographics, if available. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. Number of people engaged, including (where possible) demographic breakdown that shows participation of communities of color and other marginalized community members (please do not share names or other identifying information)*
- b. Number of partnerships with community-based organizations, and outreach strategies used to encourage participation and mitigate barriers*
- c. Summary of engagement themes/feedback*
- d. Themes in how feedback directly informed project implementation and outcomes (emphasis on feedback from communities of color and other marginalized groups)*

The community engagement for Findley Commons was completed prior to its approval as a Metro Bond project. Therefore, Metro's racial equity metrics regarding community engagement were not known or applied. Information that is available regarding community engagement for the project does not include any information regarding communities of color and other historically marginalized community members.

The development team partnered with the South Tabor Neighborhood Association to leverage their connections with the community and further outreach efforts to inform the community about the development of Findley Commons. Additionally, the team utilized social media posts, email contact lists and contacted two Parent-Teacher Associations in the area. Project information was distributed to the immediate neighborhood near Findley Commons. Project updates and information were also sent electronically to engage community members online. These efforts resulted in a development informed by community involvement and suggestions. The community engagement used neighborhood meetings, partnerships with faith organizations and CBOs to garner participation of about 25 people who were reported to have "represented a broad spectrum of the community, and a diverse group of perspectives." Themes included "general concerns about negative impacts on the neighborhood from the target population (formerly homeless Veterans) of Findley Commons, parking impacts, building quality, and building aesthetics to match the surrounding area." The on-site supports for future residents, and Do Good Multnomah's wealth of expertise, will help address many of the concerns expressed by neighbors.

Community engagement for Riverplace Phase 2 was completed in 2016 and 2017, prior to the articulation of Metro's racial equity metrics regarding community engagement and does not include any information regarding communities of color, other historically marginalized community members, or any other demographic data. Community engagement activities conducted to inform the project development

and resident services included presentations to three neighborhood groups. Major themes from these meetings centered on concerns with neighborhood safety, access to retail, parking, and native landscaping.

With the project's change from market rate to affordable housing, additional engagement was conducted in 2020 with stakeholders and neighbors. Public comments received included areas for pets, scarcity of trees, drug testing for residents, and that perhaps washers and dryers should be installed in individual units rather than having community laundry facilities (related to COVID concerns).

The team made efforts to address all these items in the following ways:

- maximizing the allowable parking for the retail and office space,
- focusing on native landscaping and providing a precise planting plan, and
- becoming part of the neighborhood association.

No significant changes were made to the design or programming of the project as a result of community engagement efforts due to cost constraints. No community feedback was focused on shaping the project to support the success of future residents.

## ATTACHMENT A: SHS INTEGRATION ADDENDUM

- a. *Please describe your anticipated strategy or strategies for integrating SHS funds into your Housing Bond implementation strategy. Possible approaches may include:*
- b. *Increase capital construction by utilizing SHS funds for rental assistance/operating subsidy to meet existing 30% AMI unit goals and increase production of 60% AMI units;*
- c. *Increase the number of 30% AMI units by leveraging SHS funds to exceed the minimum goal for deeply affordable units;*
- d. *Prioritize supportive housing by leveraging SHS funds to provide supportive services to units created through the housing bond;*
- e. *A combination to the above;*
- f. *No change in production or affordability targets; plan to use SHS funds only for rental assistance to fill identified operating gaps as modeled by Metro; or*
- g. *No change in production or affordability targets; no use of SHS funds.*

### 1. Please complete the below tables describing your anticipated approach or approaches for all approved bond projects and for remaining bond funds not yet committed.

The Portland Housing Bureau (PHB) will use the following strategies to create new supportive housing through alignment of SHS and housing bond resources, as outlined in PHB's Local Implementation Strategy (LIS):

- h. Portland's original LIS prioritizes and establishes a goal for 300 supportive housing units, contingent upon operating and services resources becoming available. PHB remains committed to reaching this goal and is not making any change in the city's production or affordability targets.
- i. 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 supportive housing units through the housing bond and sustain ongoing operation of those units. **SHS funds will be used for supportive services and rent assistance to fill identified operating and service funding gaps as modeled by Metro, PHB, JOHS and Home Forward.**
- j. Additionally, PHB issued a Request for Qualification (RFQ) for Supportive Housing Projects in October 2020 **to identify prospective supportive housing projects in the pipeline to leverage supportive housing funds from resources outside of PHB.** These projects, upon going through the PHB and Metro review and evaluation processes, will be eligible to receive contingent awards for Metro bond funds to further advance process towards our supportive housing production goal.
- k. Finally, PHB plans to issue annual Notice of Funding Availability (NOFA) opportunities starting in 2021. NOFAs will include housing bond capital resources and SHS funds for supportive housing services and operations. PHB anticipates conducting a minimum of two NOFA rounds for Metro bond resources until funds are fully expended.

## Summary of Plan for Reach Goal of 300 Supportive Housing Units

Project Name/ Owner	Strategy	Number of SH units	Communities Served
<b>Phase 1: Metro approved project</b>			
Dekum Court/ Home Forward	Project received early approval by Metro.	0	Families, BIPOC communities
<b>Phase 2: Metro and PHB approved projects with previous awarded PHB funding</b>			
Findley Commons/ Do Good Multnomah	Use of Metro bonds to fill final gap and leverage prior capital and services supportive housing investments.	35	Veterans, families, BIPOC communities
Parcel 3, Phase 2/ BRIDGE Housing	Use of Metro bonds to fill final gap and leverage prior capital and services supportive housing investments.	20	Families, Veterans, BIPOC communities
	<b>Phase 2 Sub-total:</b>	<b>55</b>	
<b>Phase 3: RFQs and NOFAs</b>			
Estimated 3 to 4 projects	RFQ for Supportive Housing Projects	Est. 100	BIPOC communities, single adults
Estimated 7 to 10 projects	Spring 2021 NOFA	Est. 85	BIPOC communities, single adults
Estimated 7 to 10 projects	Spring 2022 NOFA	Est. 60	BIPOC communities, single adults
	<b>Phase 3 Sub-total:</b>	<b>Est. 245</b>	

**2. Provide a brief narrative (500 word max) describing the rationale for these approaches and how you arrived at them. As relevant, you may wish to include description of financial modeling and policy considerations that have helped to inform your approach.**

PHB focused our strategies to align housing bond and SHS service resources to further advance the following policy priorities of the City of Portland, Multnomah County and Metro:

- Lead with racial equity: Ensure that racial equity considerations guide and are integrated throughout all aspects of program implementation to improve access and outcomes benefiting Black, Indigenous, and People of Color (BIPOC) communities;
- Create opportunity for priority communities: Access and housing opportunities will be prioritized for BIPOC communities, families, people living with disabilities, seniors, Veterans, and households experiencing or at risk of homelessness.
- Create opportunity and investments are distributed throughout the region.
- Ensure long-term benefits and good use of public dollars: Provide community oversight to ensure transparency and accountability in program activities and outcomes.
- Provide strategic alignment and leverage of other system resources for promote production and sustainability of supportive housing capacity.

PHB aligns to the County’s definition of supportive housing and needs analysis<sup>2</sup> prioritizing increased supportive housing for single adult households from BIPOC communities. Our modeling for Metro housing bond indicates a balanced portfolio is needed that includes properties that have both full (100%) and integrated (up to 30%) supportive housing units within the communities.

In Multnomah County’s [Metro Supportive Housing Services Program: Local Implementation Plan](#), approved on Dec. 19, 2020, the JOHS is committed to meeting the long-term project based rental assistance and/or support service needs of supportive housing units developed with Metro housing bond funds. This includes the 300 supportive housing units and an estimated 120 units identified as “Homeless Preference” units regulated at 30% AMI and prioritized for households exiting from homelessness.

Based on estimates from PHB, JOHS and Home Forward, projected costs for operations and services for the supportive housing and homeless preference units over the first three years is roughly \$10 million.

The tables below summarize cost estimates used for modeling purposes.

**Table 1. Cost Estimates on Rent Subsidy and Services Costs for Supportive Housing Units**

<b>Cost Per Unit Per Year Estimates (1-bedroom)</b>				
	<b>Rent Subsidy</b>	<b>Services</b>	<b>Total</b>	<b>Notes</b>
<b>Supportive Housing (Built)</b>	\$9,600	\$10,000	\$19,600	Rent based on Metro Bond Cost Model, Deeply Affordable (difference between affordable, average

<sup>2</sup> [\(Draft\) Multnomah County Local Implementation Plan: Metro Supportive Housing Services Program \(Dec. 2020\).](#)

				tenant payment and 60% LIHTC rent), includes admin
<b>Supportive Housing (Leased)</b>	\$11,300	\$10,000	\$21,300	Rent based on TBRA Cost Model, Gross Rent (capped at 120% FMR) less Total Tenant Payment, includes admin
<b>Homeless Preference</b>	\$9,600	\$3,000	\$12,600	Rent based on Metro Bond Cost Model, Deeply Affordable, includes admin
<b>Risk Mitigation Pool (RMP)</b>	\$10,000	N/A	\$10,000	<b>One-time investment of \$10,000 per SH unit</b>

**Table 2. Metro Bond Cost Modeling for Rent Reserves**

<b>Yearly Rent Reserve Estimates for Deeply Affordable Units (30% AMI)</b>					
Unit Type Estimates	150 units	75 units	50 units	25 units	300 units
Year	0-BR	1-BR	2-BR	3-BR	Total
Year 10	1,535,400	756,000	538,200	269,100	<b>3,098,700</b>
Year 11	1,566,000	771,300	549,000	274,500	<b>3,160,800</b>
Year 12	1,596,600	786,600	559,800	279,900	<b>3,222,900</b>
Year 13	1,629,000	801,900	571,200	285,600	<b>3,287,700</b>
Year 14	1,661,400	818,100	582,600	291,300	<b>3,353,400</b>
Year 15	1,693,800	834,300	594,000	297,000	<b>3,419,100</b>
Year 16	1,728,000	851,400	606,000	303,000	<b>3,488,400</b>
Year 17	1,762,200	868,500	618,000	309,000	<b>3,557,700</b>
Year 18	1,798,200	885,600	630,600	315,300	<b>3,629,700</b>
Year 19	1,834,200	903,600	643,200	321,600	<b>3,702,600</b>
Year 20	1,870,200	921,600	655,800	327,900	<b>3,775,500</b>

As described in the earlier sections, PHB will coordinate closely with the JOHS, Home Forward and community partners to implement the following strategies to successfully reach our supportive housing goal:

- Deploy Metro housing bond funds to provide final gap financing of two “Phase 2” projects, which will add 55 new units of supportive housing;
- Through the release of the October 2020 [PHB Metro Bond RFQ for Supportive Housing](#), identify 3-5 projects in the development pipeline and provide contingent commitments of Metro bond funds to these projects to maximize leverage of other capital and operations resources. This strategy will support the production of an estimated 120-150 new supportive housing units.
- Starting in 2021, issue annual Metro bond solicitations that include aligned SHS program funds and supportive housing production goals. This strategy will support the production of an estimated 50-70 new supportive housing units annually

# Housing Bond Progress Report for the City of Gresham | 2020

*The purpose of this report is to summarize Gresham’s progress toward implementing the strategies in its approved Local Implementation Strategy (LIS), for consideration by Metro’s Affordable Housing Bond Community Oversight Committee.*

## 1. PROJECTS UNDERWAY

As of the end of December 2020, the City of Gresham has one project underway. This project represents 147 new affordable homes, or 79% of Gresham’s total production target for the Housing Bond, while investing approximately 42% of its allocated \$26,756,995 in funding.

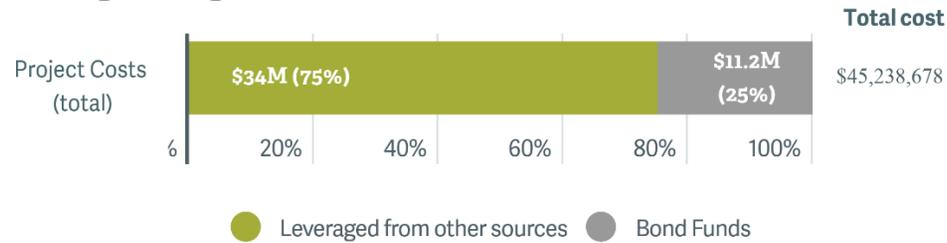


Of the homes created, 31 will have 2 or more bedrooms, representing 33% of its target for family-size homes; and 30 will be affordable to households with incomes at or below 30% of area median income (AMI), representing 39% of their Housing Bond target for deeply affordable homes.

**Table 1a: Summary of projects underway**

Project	Developer	Metro Bond Funds	Total Project Cost	Status	Anticipated ground-breaking date	Anticipated construction completion date
				<i>concept, final, construction, completion</i>		
Albertina Kerr	Edlen and Company	\$11,200,000	\$45,238,678	final	Feb-21	May-22
Total committed or underway		\$11,200,000	\$45,238,678			
Total percentage committed or underway		<b>42%</b>				

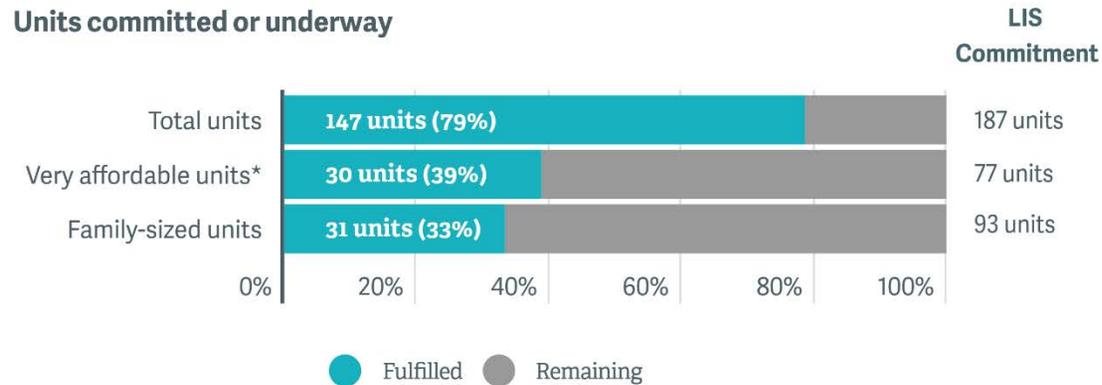
**Amount of funding leveraged from other sources**



**Table 1b: Unit production**

Tallies include **only** bond-eligible units; manager units or other non-bond funded units are not included in these counts.

Project	Total units	30% AMI units	2+ BR units	30% AMI and 2+ BR units	61-80% AMI units <i>(should be no more than 10% of total units)</i>	# of Rental Subsidies
Albertina Kerr	147	30	31	8	15	30
Total committed or underway	<b>147</b>	<b>30</b>	<b>31</b>	<b>8</b>	<b>15</b>	<b>30</b>
LIS Commitment	187	77	93	N/A	N/A	0
% of commitment fulfilled	79%	39%	33%	N/A	N/A	N/A
Remaining to achieve local targets	40	47	62	N/A	N/A	N/A



\*refers to households at 30% Area Median Income (AMI)

**Narrative 1: Referencing the data above, provide a narrative (appx. 750 words) describing progress toward implementing the development plan in your LIS. Feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you'd like to highlight. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. Description and results of competitive selections, including who was involved and how LIS criteria were applied and impacted the outcome.*
- b. Cost containment strategies.*
- c. Leveraged capital and ongoing operating funding.*
- d. Approach(es) to aligning resident or supportive services.*
- e. Plans, strategies and anticipated timelines for achieving remaining unit production targets (total, 30% AMI, 2+ bedrooms).*

The City of Gresham's Local Implementation Strategy identifies a plan to complete 2-4 developments for 187 units, of which 77 are deeply affordable and 93 are family-sized units. The City of Gresham has identified two housing investments that will produce 104% of the total housing units (194), 100% of the deeply affordable units (77), and 75% of the family-sized units (70). Gresham will need to invest in 23 family-sized units to fully meet production targets.

Gresham completed the intergovernmental agreement with Metro for administering bond funds in February 2020. Consequently, the City released a Request for Proposals (RFP) in April 2020. Consistent with Gresham's Local Implementation Strategy, the local process for project selection included review by City Staff, the Gresham Community Development and Housing Subcommittee (CDHS), and review and endorsement by the Gresham City Council. The City also retained two consultants to review the proposals for consistency with the regional bond program and local implementation strategy. One consultant focused on financing, including maximizing the leverage of bond funds. One consultant focused on community and racial equity to ensure that recommended investments provide a comprehensive approach to furthering racial equity. Metro staff also reviewed the proposals for consistency with the Metro housing bond framework. The City staff review, CDHS review, and consultant review considered 7 criteria in the evaluation of projects. These seven criteria also had an additional twenty-five sub-criteria which included considerations such as target population, contracting, access to services, culturally relevant programming and services, and property management. This process was developed to select investments that best aligned with the City's local implementation strategy.

Criteria	Scoring
Development Program	35
Engagement, Partnerships, and Furthering Racial Equity	30
Development Team and Capacity	20
Site Readiness and Location	20
Project Financing Readiness	25
Property Management / Resident Services	15
Marketing and Leasing	15

The process resulted in the recommendation of two projects to proceed: Albertina Kerr Workforce and Inclusive Housing and Rockwood 10. Albertina Kerr has completed Final Endorsement. Gresham is moving forward with endorsement for Rockwood 10, anticipated to be completed in early 2021.

*Cost containment and leveraged capital and ongoing operating funding*

Albertina Kerr Workforce and Inclusive Housing will be delivering 147 new units at a bond investment of approximately \$84,000 per unit. The project is also utilizing HUD Section 811 project rental assistance for 30 units to support the 30% AMI units. This rental assistance program is similar to Project Based Section 8 except they are for residents with intellectual and developmental disabilities. Albertina Kerr is also contributing the land to the project, and had a significant philanthropic capital campaign. The project will benefit from a restriction on property taxes under Exemption 70 and 11.

Rockwood 10 will be delivering 47 units of 30% AMI housing, and benefits from utilization of the 4% LIHTC program, and that these units are part of a larger campus providing a range of services and an additional 177 units of regulated housing.

*Construction*

Albertina Kerr Workforce and Inclusive Housing is anticipated to begin construction in February 2021, and be completed in spring of 2022.

*Approaches to Aligning services*

Albertina 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 such as Urban League of Portland, Latino Network, El Programa Hispano and IRCO, and other organizations such as Human Solutions. The 30 units for those with intellectual and developmental disabilities 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. 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 disabilities. 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.

Community Development Partners (CDP) and Hacienda CDC are partnering with Hacienda Youth and Family Services to provide services at Rockwood 10. This partnership is critical in providing culturally specific programming and services tailored to keep low-income families in their homes. Some households applying for affordable housing will have problems with language barriers, poor credit, or recent evictions, primarily for non-payment of rent, and low incomes. Hacienda Resident Services staff will work closely with the property management firm to provide culturally specific language services and establish low-barrier screening criteria which allows for some flexibility in the application decision. Residents with prior evictions for non-payment of rent will be given options on how to mitigate their past rental history. Options include payment of a security deposit, agreement to participate in financial fitness training, participation in case management services or other support services, depending upon the barriers identified for the family and an evaluation of the applicant's eligibility to obtain any public assistance. Hacienda's Youth and Family Services Resident Advocate will be the primary point of contact for each resident selected for Housing at the Rockwood 10 apartments.

*Plans, strategies and anticipated timelines for achieving remaining unit production targets*

With the completion of both Albertina Kerr Workforce and Inclusive Housing and Rockwood 10, Gresham will have 23 units of 2+ bedroom units remaining for the completion of unit production targets.

The City is currently focused on the construction, leasing, marketing, and managing of the two investments currently selected. The City anticipates further discussion with City Council and a community-engagement process beginning in spring 2021 to assist in developing priorities for the remaining bond funds. This process is anticipated to inform a future solicitation that would be released in late 2021 or early 2022. Given the need for 23 units of family-sized units to complete the cities remaining unit production targets, this future solicitation will focus on an investment to produce family size housing.

## 2. RACIAL EQUITY DEVELOPMENT METRICS

The following metrics reflect preliminary cost estimates and development plans. These figures will be updated as projects are refined during the planning process. Note that metrics related to total cost take into account all units within a project, whereas metrics related to bond subsidy only consider bond eligible units.

**Table 2a: Location/access**

Project	Location (Address)	Within ¼-mile of frequent service bus?	Within ¼-mile of non-frequent service bus?	Within ½ mile of MAX?	Within 1/3 mile of park or green space?	Walkscore
Albertina Kerr	930 Northeast 162nd Ave, Gresham, OR 97230	No	Yes	Yes	No	54
% of projects that meet criteria:		0%	100%	100%	0%	
				Average walkscore:		54

Proximity should be calculated using the "walk" function in Google Maps.

<https://www.walkscore.com/>

Project name	Notes: Describe access to other amenities, including schools and groceries.
Albertina Kerr	Housing development located on Albertina Kerr's 10-acre campus.

**Table 2b: Equitable Contracting**

Project name	General contractor	Contracting goal*	
		% total hard costs to be awarded to COBID firms (required metric)	% total soft costs to be awarded to COBID firms (optional metric)
Albertina Kerr	Pence	20%	

\* For projects that have a 'minimum' and 'aspirational' goal, please report the minimum goal.

**Notes for Table 2b: Please provide interim progress for projects that are under construction. If you have additional contracting goals, please note them here.**

Albertina Kerr is anticipated to be under construction in February 2021.

**Table 2c: Prevailing Wage**

Project name	Prevailing wage - Davis Bacon, BOLI
Albertina Kerr	No

**Table 2d: Workforce Participation (if applicable/tracked)**

Project name	Workforce Tracking (Y/N)	Goal for % of total work hours worked by apprentices (optional)	Goal for % of total hours worked by women (optional)	Goal for % of total hours worked by POC (optional)
Albertina Kerr				

**Notes for Table 2d: Please provide additional summary information regarding project-level strategies and goals, and interim progress if available.**

**Describe progress toward implementing your LIS strategies for advancing racial equity. In addition to data provided in the above tables, feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you'd like to highlight. 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, including proximity to parks/green space/trails, public elementary/middle/high schools, other types of schools, and groceries*
- b. *How selected projects have incorporated or are incorporating strategies for fair housing*
- c. *Outcomes or project-level goals/commitments related to diversity in contracting and hiring*
- d. *Outcomes or project-level plans to align culturally specific programming and supportive services to meet the needs of tenants.*

*How locations of selected projects supported the location strategy*

Gresham's local implementation strategy requires development partners to conduct an assessment of the development site and adjacent community, documenting the community assets that can respond to residents needs and further opportunity. For locations in the city with fewer community assets, the strategy requires developer to document the ways in which their investment will increase access and opportunity for residents and the local community. These requirements were incorporated into the RFP issued in April 2020 and measured by within the criteria for Development Program and the *access to services* sub criteria under Engagement, Partnerships, and Furthering Racial Equity.

The two investments selected are located in areas that provide excellent access to transit and key amenities. Importantly, both investments are located within a campus setting co-located with mission-driven organizations that provide a variety of services.

Albertina Kerr is situated on a 9-acre campus immediately along NE 162nd Ave, and is in a residential neighborhood with a mix a low-rise multifamily and single-family housing, with convenient access to transit, grocery stores, health care services, community centers, parks and school. There are bus stops immediately next to the site on each side of the street (less than 0.1 mi walking) and a MAX station is 0.5 miles walking distance with sidewalks, ramps and lights along the entire distance except for ~125 feet as the sidewalks along Kerr's property will be improved as part of the project. 162<sup>nd</sup> has an active bus line, and was identified for additional transportation improvements within Metro's regional transportation measure in the fall of 2020.

Rockwood 10 is located in the heart of the Rockwood town center, that is the center of Rockwood's cultural and social hub. It is within a ¼ mile from the Burnside Max station and within 1/3 miles from the nearest TriMet bus line. As part of the development, Rockwood 10 will extend SE 185th right-of-way (road and sidewalk) from the north end of the property through the site connecting to Yamhill Street. The town center is a true community of residential and smaller scale services in a walkable, pedestrian-oriented environment with integrated open spaces. This includes the Downtown Rockwood development, which has a workforce trades center, business development

hub, and food market hall. Wallace Medical Concern, Worksource Oregon, and Mt. Hood Community College Small Business Development Center are all located nearby.

*How selected projects have incorporated or are incorporating strategies for fair housing*

Albertina Kerr will be using affirmative marketing practices to market the housing units to communities of color and persons with disabilities per an Affirmative Fair Housing Marketing Plan (AFHMP). Albertina Kerr will solicit feedback from referring and culturally specific organization to make our 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, and these activities would start between 6 months 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 10 has also completed Affirmative Fair Housing Marketing Plan that includes substantial outreach to the community and organizations that work with communities of color, a marketing plan, and low-barrier screening. More information is available in the AFHMP and community engagement plan.

*Outcomes or project-level goals/commitments related to diversity in contracting and hiring*

Both Albertina Kerr Workforce and Inclusive Housing have made significant commitments related to contracting. Albertina Kerr is currently over 30% for COBID certified firms. Rockwood 10 also exceeds the city goal for 20% of hard costs meeting COBID requirements.

*Outcomes or project-level plans to align culturally specific programming and supportive services to meet the needs of tenants*

The 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.

As noted in previous question, CDP 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.

### 3. COMMUNITY ENGAGEMENT

**Describe your progress toward implementing your LIS strategies for ongoing community engagement (appx 750 words). Where possible, please incorporate engagement data/metrics describing the number of people/organizations engaged and demographics, if available. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. Number of people engaged, including (where possible) demographic breakdown that shows participation of communities of color and other marginalized community members (please do not share names or other identifying information)*
- b. Number of partnerships with community-based organizations, and outreach strategies used to encourage participation and mitigate barriers*
- c. Summary of engagement themes/feedback*
- d. Themes in how feedback directly informed project implementation and outcomes (emphasis on feedback from communities of color and other marginalized groups)*

Like other public agencies, the City of Gresham continues to explore effective outreach strategies during the pandemic. Most recently, the City hosted a housing forum in November 2020 via Zoom webcast, that included twenty-three individuals, including organizations such as Human Solutions, Microenterprise Services of Oregon (MESO) and My Father's House. The City spent the summer and fall of 2020 publicizing the RFP solicitation, which included public meetings, discussion with the community development and housing subcommittee, and City Council.

Going forward, City staff has begun scoping a public engagement process that will align with our new City Council and the City's diversity, equity, and inclusion efforts. The key decision is to assist in identifying priorities for the remaining funds, and the City will be partnering with community organizations to host forums and identify community liaisons to shape the vision for a future solicitation. These will include outreach to the partners that supported the local implementation strategy development such as Beyond Black CDC and El Programa Hispano, Quad Inc. as well as the more than two dozen organizations that have assisted in the outreach for the two development projects underway.

Albertina Kerr's community engagement plan for the project has included outreach in order to understand the demand for and needs of the direct support professionals (DSP) and those with intellectual and development disabilities (I/DD), as well as communicate and solicit feedback from the neighboring community that Kerr has been part of for over 100 years.

In 2018, Kerr worked closely to collaborate with four other Portland Metro organizations that predominantly employ DSPs to understand and refine the housing needs for this workforce. This group was led by Albertina Kerr and included Central City Concern, LifeWorks NW, Morrison Child and Family Services and Trillium Family Services and was funded by a capacity building grant provided by Meyer

Memorial Trust. They found that of their 3,421-person workforce, 1,592 individuals earned less than \$35,000 per year. Kerr and two of the organizations collected a robust survey directly from a large number of their DSP employees which highlighted the interest and demand for this kind of housing, as well as the priorities of the population. Kerr also consulted with professionals, organizations and peers to understand the accessibility needs of the disability community, so as to design housing that could overcome barriers to independent and inclusive living. As part of the external communication, the development team presented the project's design to the Wilkes East Neighborhood association in November 2019 and will go back for additional presentations for marketing and leasing strategies given the target populations, as well as to provide updates during construction.

The feedback from the survey and focus group with Kerr DSP staff demonstrated that many staff were interested in living in affordable housing owned by Kerr within 30 minutes of their workplace. In addition, many staff live doubled up in order to be able to afford housing. Staff also provided feedback on which amenities were the most desirable.

Key findings from the study include:

- Data regarding the prevalence of I/DD among adults is outdated and likely severely underrepresents the number of adults with I/DD. Based on the outdated prevalence rate, there are 31,000 adults with I/DD in region (could be as much as 5 times higher).
- Of these, there may be more than 24,000 (77%) at risk of losing their housing in the coming years, due to lack of affordable and accessible options and the number that are living with aging caregivers.

The feedback received from DSPs influenced the unit mix (addition of 3-bedroom units to serve larger families) and amenities that were included in the project (as described above). The feedback received from individuals with I/DD resulted in the addition of the 30 units at 30% AMI and designed to be fully accessible (see specific unit features above) to meet this great unmet need in the metropolitan area. The feedback received from individuals with I/DD also resulted in choosing a construction type that included an elevator so that the accessible units could be located on all floors and thus fully integrated into the community.

Aside from expanding outreach to additional referral organizations, those that work with people with disabilities, and the nearby community, the Albertina Kerr will continue to engage with the community by reaching out to the Reynolds School District, partner with culturally relevant organizations to reach residents with specific needs, and advance the affirmative marketing, advertising, and leasing activities. A schedule for these is provided in the community engagement plan.

Community Development Partners and Hacienda CDC have spent several years developing the Rockwood 10 plan with the residents, organizations, and networks that comprise the Rockwood community. This began very early in the process working with Center for Public Interest Design (CPID) to do an Asset Based Community Development (ABCD) analysis of the site, community specifically to inform the design and programming. Discussions indicated the need for diversification of housing types, as well as the residents they serve. With Rockwood's increasing density, there is a need for accessible family-sized units with services that support enduring fiscal health and education. Units and programming conducive to seniors was also demanded through communications with the Neighborhood Association during the project design phase.

The need for a safe pedestrian network connecting services and businesses to residential districts and public open spaces as well as public transportation was a high priority. Parking was a concern for some neighbors. Given the proximity of Vance Park, having a park that was more robustly programmed with services was a priority.

Through outreach from organizations such as Hacienda, NAYA, Beyond Black, and East County Rising Rockwood 10 developed a program to provide family sized units with a range of income levels. Some of the organizations asked to participate include: Rockwood Center, Snow Cap, Refugee and Immigrant Hospitality Organization (IRCO), Rosewood Initiative, Boys and Girls Club, New Adventures For Youth, MESO, Metro East DIY, Birch Community Services, Rockwood CDC, Rockwood Neighborhood Association, Rockwood Rising, Pueblo Unido, Latino Network, Metropolitan Family Services, Beyond Black CDC, NAYA, Human Solutions, New Avenues for Youth, Outgrowing Hunger, PlayEast, Black Food Sovereignty Coalition, Metropolitan Family Services, Growing Gardens, El Programa Hispano, Go Get Your Child and Rockwood residents.

A number of key themes were identified and incorporated into the project:

- A centralized space that could accommodate informal gathering was the impetus for a public commons within Rockwood 10. That this commons would then begin to connect a wide array of services and opportunities through Rockwood's town center came as the result of conversations with community associations and stakeholders. Youth services and educational opportunities were identified as predominately existing outside Rockwood's central core, with inner-core resources fragmented due to lack of safe infrastructure. In response, this report outlines means by which Rockwood 10 will create new connections for this thriving community.
- Provide safer connections: Signs, pavement markings and traffic-calming devices will provide safe arterial routes for pedestrians and bicyclists.
- Reduce cut through traffic and speeds: Green infrastructure and traffic-calming devices will discourage increased speeds and unnecessary use.
- Safe intersections: Improved crosswalks will provide opportunities for network connections and wayfinding to public commons.
- Guides and wayfinding: Signage and pavement markings will illuminate safe routes and nearby amenities like parks, schools and business districts

## ATTACHMENT A: SHS INTEGRATION ADDENDUM

- a. Please describe your anticipated strategy or strategies for integrating SHS funds into your Housing Bond implementation strategy. Possible approaches may include:
- b. Increase capital construction by utilizing SHS funds for rental assistance/operating subsidy to meet existing 30% AMI unit goals and increase production of 60% AMI units;
- c. Increase the number of 30% AMI units by leveraging SHS funds to exceed the minimum goal for deeply affordable units;
- d. Prioritize supportive housing by leveraging SHS funds to provide supportive services to units created through the housing bond;
- e. A combination to the above;
- f. No change in production or affordability targets; plan to use SHS funds only for rental assistance to fill identified operating gaps as modeled by Metro; or
- g. No change in production or affordability targets; no use of SHS funds.

**1. Please complete the below tables describing your anticipated approach or approaches for all approved bond projects and for remaining bond funds not yet committed.**

### Existing Projects with Concept Endorsements or Final Approval

Project Name	Approach(es) (see above options)
Albertina Kerr Workforce & Inclusive Housing	e) no change in targets; but explore option for rental assistance or operating gaps; or f) no change anticipated.

### Remaining Bond Funds

Project or solicitation name (use multiple rows if multiple approaches will be used to select projects for remaining funds – or just list “all remaining funds” if only one approach will be used)	Approach(es) (see above options)
Rockwood 10	e) no change in targets; but explore option for rental assistance or operating gaps; or f) no change anticipated.
Future solicitation (anticipated 2022)	e) no change in targets; but explore option for rental assistance or operating gaps; or f) no change anticipated.

**2. Provide a brief narrative (500 word max) describing the rationale for these approaches and how you arrived at them. As relevant, you may wish to include description of financial modeling and policy considerations that have helped to inform your approach.**

The City of Gresham will work closely with the Joint Office of Homeless Services and Multnomah County to maximize the benefit of supportive housing services (SHS) within the City. Gresham's Local Implementation Strategy for the Regional Affordable Housing Bond, subsequent solicitation in 2020, and selection of two projects for the housing bond has identified the investments to meet the City's 30% AMI unit goal of 77 units. This goal has been met without the need to utilize SHS funds.

The City of Gresham retains flexibility to utilize supportive housing services funding for the highest and best use that aligns with the County's supportive housing services local implementation plan. While the Albertina Kerr Workforce and Inclusive Housing development and the Rockwood 10 development do not require SHS funds for capital construction or operating expenses, the City does not want to preclude the ability to explore a SHS investment in these properties in the future if doing so will allow for the expansion of services. This is particularly true for these investments, as they are both located in a campus setting with a variety of services, and service providers, located on site. The City does not anticipate the need for SHS in conjunction with a future housing bond solicitation, but does not want to preclude the ability to do so in the future, particularly as the county plan is completed and work begins. The City is also exploring potential SHS investments with existing service providers in the City as well as existing regulated housing. Selection for best programs to invest SHS in the City will be done in close collaboration with the Joint Office of Homeless Services and Multnomah County.

# Housing Bond Progress Report for Home Forward | 2020

*The purpose of this report is to summarize Home Forward's progress toward implementing the strategies in its approved Local Implementation Strategy (LIS), for consideration by Metro's Affordable Housing Bond Community Oversight Committee.*

## 1. PROJECTS UNDERWAY

### Troutdale

Home Forward has an allocation of approximately \$15.9M in Metro bond funds that will be used to develop housing in the “Balance of County” (areas outside the cities of Portland and Gresham). As an experienced owner and developer, Home Forward will develop and own its bond funded project(s) directly, rather than acting as a funder/pass-through entity.

We have focused our efforts on Troutdale because it has the largest population and highest need for affordable housing when compared to Fairview and Wood Village. Home Forward has worked with the city of Troutdale and Multnomah County to transfer a 3.5-acre vacant parcel of land at no cost to Home Forward. The County Commissioners approved an Intergovernmental Agreement (IGA) outlining the land transfer on December 17, 2020. This helps to reduce the overall cost of the project and leverages land from other public funders with similar goals for increased affordable housing.

Home Forward will begin the development process, starting with architect and contractor selections in the first quarter of 2021. We plan to use non-competitive 4% tax credits and other non-competitive resources to fill the funding gaps, which would allow the project to start construction in summer 2022 and begin occupancy in summer 2023. We plan to use Supportive Housing Services funding for rental assistance to fill the remaining gaps and support resident services.

If this project proceeds as planned by using the zoning density from the city owned adjacent vacant site, we will meet all the unit targets at this one project. If we are restricted to the current zoning allowed of 103 units, we will work with Metro to determine how best to use the remaining funding for eight units and meet the production targets.

### Dekum Court

As a Phase I Metro bond project within the City of Portland, Dekum includes the redevelopment of 40 units of existing public housing and an additional 147 affordable homes financed with Metro GO Bond funds. Although the original plans estimated a total of 200 units, the final total is 187 units due to financing and site conditions. The final design consists of five 3-4 story apartment buildings spread across four acres of the site with an additional acre held as a “land bank” for future development. A centrally located community building will provide property management offices and areas for community gatherings. The first phase of construction is scheduled to begin in August

2021 and will allow for existing Dekum residents to stay in their current homes until the new apartments are ready for them to occupy. Phase 2 construction will begin with demolition of the former public housing units, construction of the remaining new homes and completion by March 2024.

	CONSTRUCTION PHASING #1: 47 UNITS		CONSTRUCTION PHASING #2: 140 UNITS	TOTAL PROPERTY
	REPLACEMENT HOUSING	NEW UNITS WITH METRO BOND FUNDS	NEW UNITS WITH METRO BOND FUNDS	TOTAL
Studio	--	05	51	56
1 Bdrm	--	--	16	16
2 Bdrm	16	02	49	67
3 Bdrm	23	--	18	41
4 Bdrm	01	--	06	07
<b>Total</b>	<b>40</b>	<b>07</b>	<b>140</b>	<b>187</b>

**Within the 147 Metro funded units:**

Unit Size	AMI Limit	Unit Count	Type of unit
0BR	30%	24	New -- Metro Funded
0BR	60%	32	New -- Metro Funded
1BR	30%	5	New -- Metro Funded
1BR	60%	11	New -- Metro Funded
2BR	30%	18	New -- Metro Funded
2BR	60%	33	New -- Metro Funded
3BR	30%	11	New -- Metro Funded
3BR	60%	7	New -- Metro Funded
4BR	30%	3	New -- Metro Funded
4BR	60%	3	New -- Metro Funded
<b>Totals</b>		<b>147</b>	

Metro Units	147
% of Metro units @ 30% AMI	41.5%
% of family sized Metro Units	51%

*Cost Containment*

Dekum Court’s construction budget has to accommodate increased costs associated with a two-phased construction sequence (escalation of material and labor costs) and building on an occupied site (greenfields are inherently less expensive to develop). LEVER Architecture and Walsh Construction have approached the project with a rigor that minimizes unnecessary costs and maximizes value and amenities that will benefit residents.

- Existing 40 apartments and associated off-street parking are retained during the construction of Phase 1—saves significant temporary relocation costs
- Site plan uses exiting access points and utility connections—reduces infrastructure costs
- Buildings are oriented to the slope—minimizes excavation and grading
- Building form balances an appropriate response to context and access to light, air and views with a disciplined approach to construction means and methods—there are few unit types, structural load paths are continuous, and floor-to-floor and room dimensions are consistent with building materials

- Mechanical and plumbing systems are optimized—kitchens and baths are modular, runs are as short possible, fixtures are back-to-back
- Circulation space in units is limited to create truly livable spaces—more occupiable floor area and in-unit storage in fewer square feet

### *Leveraging of Funds*

Dekum will use 4% tax credits, Home Forward Development Reserves, rental assistance and low-interest debt enabled by Oregon Affordable Housing Tax Credits (OAHTC) to meet Metro’s 30% AMI goals and family housing requirements in a single project. All state resources utilized on Dekum are non-competitive resources in nature (4% tax credits and OAHTC), thereby leaving competitive resources (LIFT, 9% tax credits) available for other developers in the region.

## **2. RACIAL EQUITY DEVELOPMENT METRICS**

**Describe progress toward implementing your LIS strategies for advancing racial equity. In addition to data provided in the above tables, feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you’d like to highlight. 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, including proximity to parks/green space/trails, public elementary/middle/high schools, other types of schools, and groceries*
- b. How selected projects have incorporated or are incorporating strategies for fair housing*
- c. Outcomes or project-level goals/commitments related to diversity in contracting and hiring*
- d. Outcomes or project-level plans to align culturally specific programming and supportive services to meet the needs of tenants.*

Home Forward has recently increased its MWESB contracting goals from 20% to 28%. We hope to meet our new 28% goal at both the Dekum and Troutdale sites. As part of the general contractor selection process, we score questions related to general contractor practices, lessons learned and experience meeting 28% MWESB goal. We follow our Workforce Training and Hiring Program, which requires state-registered apprentices to work a minimum of 20% of the labor hours per trade on construction contracts over \$200,000 and subcontracts of no less than \$100,000. In addition to apprentice hours, Home Forward’s program aims to increase the numbers of women and communities of color in the construction trades. We will report on our ongoing project participation to Metro.

As with all of our projects, Home Forward plans to:

- Engage targeted and/or marginalized communities, communities of color and service providers that work with those communities as part of our community engagement and leasing process
- Create an inclusive tenant screening criteria process, minimizing barriers to housing experience by communities of color;

- Provide culturally specific resources and services.

#### **Dekum Court**

Contracting Process – The competitive process for selection of the CMGC included a requirement to meet a 20% MWESB goal. During subsequent contract negotiations, the contractor has agreed to meet Home Forward’s new 28% MWESB goal. In addition to reporting on apprenticeship hours, Home Forward is including new requirements for reporting on journey-level hours by women and BIPOC participants. The Equity Plan attachment to the contract also requires significant progress to improve jobsite culture such as documented participation in training programs such as “Green Dot” or “Rise Up” models.

In addition, Home Forward is looking to develop a new program in collaboration with the four state-certified pre- apprenticeship training programs to 1) increase participation of women and BIPOC communities and 2) increase successful apprenticeship experiences. The initial pilot project will focus on two construction projects (Dekum and PCC-Killingsworth which are within half a mile of each other) with the recognition that apprenticeship experiences may occur throughout the Metro region. In addition to outreach to Home Forward residents and participants, recruitment will also include the geographic area surrounding the construction sites (roughly the neighborhoods of Woodlawn, Concordia and Cully in NE Portland).

#### **Troutdale**

Location selection - The Troutdale site meets the location strategy outlined in Home Forward’s LIS by being zoned correctly to hold nearly 111 units, being donated and being close to parks, public schools, job opportunities, public transportation and other amenities.

### **3. COMMUNITY ENGAGEMENT**

**Describe your progress toward implementing your LIS strategies for ongoing community engagement (appx 750 words). Where possible, please incorporate engagement data/metrics describing the number of people/organizations engaged and demographics, if available. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. Number of people engaged, including (where possible) demographic breakdown that shows participation of communities of color and other marginalized community members (please do not share names or other identifying information)*
- b. Number of partnerships with community-based organizations, and outreach strategies used to encourage participation and mitigate barriers*
- c. Summary of engagement themes/feedback*
- d. Themes in how feedback directly informed project implementation and outcomes (emphasis on feedback from communities of color and other marginalized groups)*

**Troutdale**

Prior to adoption of the LIS, engagement included focus groups with low income residents at nearby Home Forward properties and clients of El Programa Hispano. A large workshop with service providers in east Multnomah County also provided input regarding services gaps (reported previously). On-going engagement has included County and City elected officials and staff. Now that the County has confirmed transfer of the donated land, more extensive outreach will continue in early 2021. We anticipate forming a working group comprised of staff and residents of east county housing advocates, plus local school officials (including Head Start and Mt Hood Community College), and neighboring residents and businesses to help inform the design process and services planning.

**Dekum Court**

Extensive community engagement is summarized in the following table.

Timeframe	Primary participants	Description
July 2015	Residents	Group meeting & dinner: Outreach about subsidy change application (HUD RAD program)
June 2019	Residents	Group meeting & dinner: Outreach about HUD approval for subsidy change (presentation; Q & A's)
Feb 2020	Residents	Group meeting & dinner: Outreach about timeline; subsidy change and first meeting with design team  Door-to-door distribution of Community Newsletter and timeline (before and after meeting)
Feb 2020	Concordia Neighborhood Association members; (Land Use Committee)	presentation of initial concepts & invitation to participate in CAC

March 2020	Woodlawn Neighborhood Association members	presentation of initial concepts & invitation to participate in CAC
April 2020 thru November 2020	24 CAC members <ul style="list-style-type: none"> <li>• 6 current residents</li> <li>• 6 neighbors</li> <li>• 12 community partners (advocates, educators,</li> </ul>	90 minute Zoom meetings: #1 – Introductions and review of goals #2 – Site design focus #3 – CAC visioning; tracking log #4 – Resident services & property management #5 – Site design focus #6 – Equity focus #7 – Site design, community building, interior apartment layout focus #8 – Design focus (cont. from #7) #9 – Financing and next steps
July 2020	Residents	Door-to-door written survey of resident needs conducted by resident services contractor
August 2020	Residents	Three design focus groups (2 English-speaking and 1 Spanish-speaking)
September 2020	Concordia Neighborhood Association members (Land Use Committee)	Updated presentation upon request of Land Use Committee
October 2020	Residents	Dinner, Zoom Call, and Youth art contest kickoff
October 2020	Adjacent neighbors (approximate 2 blocks surrounding site)	130 direct mail invitations included in Community Newsletter update; Zoom meeting presentation and Q & A

The 24 Community Advisory Committee (CAC) worked closely with the design team to balance conflicting goals. CAC members included 4 African Americans; 5 Latinx and Native American members; and 2 residents with disabilities. Community partners invited to participate include Albina Head Start, Urban League, NAYA, Hacienda CDC, Work Systems, Multnomah County Library; and Portland Public Schools. Current Home Forward residents serving on the CAC received stipends at a rate of \$25/hour for their participation in CAC meetings.

Key feedback that influenced the final design included:

- Desire for both in-unit washer and dryer hook ups (appliance provided by residents) and an on-site community laundry facility for those who don't own appliances
- Expanded storage space within units (prioritize over larger living areas)
- 75 on-site parking spaces (representing a balance between neighbor & resident desires for more parking and City regulations that do not require on-site parking)
- Desire for outdoor sports court adjacent to community building
- Strong support for increased ADA units above the minimum required (17 ADA units included represent 5 more than the minimum) plus all the remaining ground floor units are "visitable")
- Willingness to "wait and see" in relationship to the programming for the land banked area. Possibilities include affordable home ownership, additional parking and/or additional rental housing as the potential for much more housing allowed by zoning.)

On-going activities include outreach to Portland Public Schools and Head Start regarding potential partnerships for a community educational facility on-site (with additional fundraising to pay for building on donated land).

During 2021, the CAC will be meeting quarterly. Prior to their February meeting, a SurveyMonkey is under development to get feedback on the initial process and how they might recommend changes going forward.

## ATTACHMENT A: SHS INTEGRATION ADDENDUM

Please describe your anticipated strategy or strategies for integrating SHS funds into your Housing Bond implementation strategy. Possible approaches may include:

- a. Increase capital construction by utilizing SHS funds for rental assistance/operating subsidy to meet existing 30% AMI unit goals and increase production of 60% AMI units;
- b. Increase the number of 30% AMI units by leveraging SHS funds to exceed the minimum goal for deeply affordable units;
- c. Prioritize supportive housing by leveraging SHS funds to provide supportive services to units created through the housing bond;
- d. A combination to the above;
- e. No change in production or affordability targets; plan to use SHS funds only for rental assistance to fill identified operating gaps as modeled by Metro; or
- f. No change in production or affordability targets; no use of SHS funds.

1. Please complete the below tables describing your anticipated approach or approaches for all approved bond projects and for remaining bond funds not yet committed.

### Existing Projects with Concept Endorsements or Final Approval

Project Name	Approach(es) (see above options)
Dekum	No change in production or affordability targets; no use of SHS funds.

### Remaining Bond Funds

Project or solicitation name (use multiple rows if multiple approaches will be used to select projects for remaining funds – or just list “all remaining funds” if only one approach will be used)	Approach(es) (see above options)
Troutdale	No change in production or affordability targets; plan to use SHS funds only for rental assistance to fill identified operating gaps as modeled by Metro.

**2. Provide a brief narrative (500 word max) describing the rationale for these approaches and how you arrived at them. As relevant, you may wish to include description of financial modeling and policy considerations that have helped to inform your approach.**

If approved by the Joint Office of Homeless Services, Home Forward plans to use SHS funds at our Troutdale project for rental assistance to support planned 30% AMI units. This will not increase the number of 30% units, but will allow the project to leverage more debt, which will likely close the funding gap. Without SHS funds the project would have to apply for competitive funding and would take longer to build and occupy. Using SHS funds will not change the production or affordability targets because rental assistance is not available in Multnomah County for Metro bond units.

Using SHS funds will also help ensure that extremely low-income residents are not rent burdened. Without SHS funds residents would have to pay rents at 30% AMI rather than having the rent be 30% of their actual income. If a tenant's income is zero the tenant pays zero in rent, ensuring the lowest income residents are not rent burdened. We do not plan to provide Permanent Supportive Housing at Troutdale due to the lack of easily accessible mental and behavioral health services, hospitals, pharmacies, clinics and public transportation.

# Housing Bond Progress Report for the Site Acquisition Program | 2020

*The purpose of this report is to summarize the Site Acquisition Program's progress toward implementing the strategies in its approved Local Implementation Strategy (LIS), for consideration by Metro's Affordable Housing Bond Community Oversight Committee.*

## 1. PROJECTS UNDERWAY

The Site Acquisition Program (SAP) is moving forward with affordable housing on two Metro-owned properties. The SAP is also currently under contract on a third property and should close in June, 2021. Metro-owned properties purchased with funds from outside of the housing bond may utilize SAP funds as gap funding in coordination with the local implementing jurisdiction.

### **Elmonica Station, 10730 Baseline Rd, Beaverton**

Metro and the City of Beaverton successfully released a joint solicitation for an affordable housing developer to develop Metro's 1.07 acre property near the Elmonica MAX Station purchased with TOD Program funds in anticipation of developing a Housing Bond project. Metro and the City released the solicitation on November 2<sup>nd</sup>, 2020 and held a developer information session November 18<sup>th</sup>. Responses are due January 15<sup>th</sup> and staff anticipate a developer will be recommended by a selection panel appointed by Metro and the City in late February or early March.

Metro and the City developed the goals of the Elmonica project to complement the remaining targets in Beaverton's LIS. Staff expect the site can yield approximately 60-80 units. Of those, the solicitation is requiring that 28 units be reserved for very-low income households earning 30 percent AMI or below and that 29 units be family-sized with two or more bedrooms.. These targets should complement Beaverton's remaining jurisdictional LIS goals.

The Elmonica Station site meets several SAP location goals, including being located in an area with higher than the regional rate of People of Color and people with Limited English Proficiency, near schools and parks, within walking distance to high frequency transit, in an area with limited existing income-restricted affordable housing, and within a HUD Difficult Development Area which allows for a boost in eligible tax credits.

Metro anticipates leveraging TOD Program funds in addition to remaining SAP funds designated to the City of Beaverton. Additional details on supportive services, cost containment, and capital/ongoing funding will be available once a project is selected.

### **TBN Building, 74<sup>th</sup> & Glisan, Portland**

Metro and the City of Portland are conducting community outreach to support a future developer solicitation for Metro's 1.6 acre property at 74<sup>th</sup> and NE Glisan in Portland purchased with TOD Program funds in anticipation of a Housing Bond project. Metro staff have facilitated two meetings of a neighbor/stakeholder engagement group that will continue to meet regularly until early spring, 2021. The purpose of this group is to inform goals that may be included in the solicitation, including desired ground floor uses, developer characteristics, future outreach, outdoor space, etc. The stakeholder group is made up of nearby faith organizations, businesses and schools, neighbors and advocacy organizations representing the houseless population, people with affordable housing needs, cultural groups and BIPOC community groups.

Metro and Portland Housing Bureau staff expect to release a solicitation for an affordable housing developer in late spring that could deliver approximately 120 -150 units on the site that meet LIS goals for 30 percent AMI affordability and 50 percent family-sized units. Prior to development occurring, part of the existing building is currently leased to African Youth Community Organization (AYCO) for office uses at a discounted rate.

The TBN Building site meets SAP location goals, including being in an area with higher than the average regional rate of People of Color, people with Limited English Proficiency, and people with low incomes. The SAP LIS seeks to target acquisitions in areas at risk of displacement. The City of Portland identified this area as at early risk for displacement in its 2013 Gentrification and Displacement Study. The relatively large site can support family sized units while maintaining proximity to high frequency bus transit along Glisan and Burnside, while also being near highly desired amenities like grocery stores.

### **Portland Value Inn, 10450 SW Barbur Blvd, Portland**

The SAP is under contract with but has not yet closed on a one acre property located at 10450 SW Barbur Blvd. The site is currently a hotel that is being utilized by the Joint Office of Homeless Services (JOHS) as a temporary COVID-19 shelter. The SAP's acquisition of the site would lower JOHS's cost burden to operate the shelter until eventually redeveloped by an affordable housing developer. The location meets SAP LIS goals of being within an area with higher than the regional rate of People of Color and people with Limited English Proficiency, near high frequency transit, adjacent to an elementary school, and in an area at risk of displacement due to the potential future investment in the Southwest Corridor MAX.

Project	Developer	Metro Bond Funds	Total Project Cost	Status	Anticipated ground-breaking date	Anticipated construction completion date
				<i>concept, final, construction, completion</i>		
Elmonica Station, Beaverton	Solicitation responses due January 15th	~\$11.9 mil (\$3.46 SAP)*	TBD	RFQ	2022	2023
TBN Building, 74 <sup>th</sup> & Glisan, Portland	Solicitation release in spring, 2021	~\$17 mil (SAP share TBD)*	TBD	Outreach	2023	2024

\* Total bond funds will be a mixture of local jurisdiction allocation and SAP allocation

## 2. RACIAL EQUITY DEVELOPMENT METRICS

Describe progress toward implementing your LIS strategies for advancing racial equity. In addition to data provided in the above tables, feel free to include additional data illustrating progress toward local goals, if there are other relevant metrics you'd like to highlight. 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, including proximity to parks/green space/trails, public elementary/middle/high schools, other types of schools, and groceries*
- b. *How selected projects have incorporated or are incorporating strategies for fair housing*
- c. *Outcomes or project-level goals/commitments related to diversity in contracting and hiring*
- d. *Outcomes or project-level plans to align culturally specific programming and supportive services to meet the needs of tenants.*

The Metro SAP Criteria prioritizes racial equity by acquiring sites in the following locations:

- In areas where there are existing marginalized communities including communities of color, English language learners, and low-income households.
- In areas lacking investments in affordable housing
- In neighborhoods where displacement is occurring or has occurred.
- Near amenities identified as priorities in Metro's community outreach process.

### **Elmonica Station, 10730 Baseline Rd, Beaverton**

Metro's Elmonica Station site addresses most of the racial equity location criteria reflected in the SAP LIS. The site is within an area with higher than the regional average of People of Color and people with Limited English Proficiency. The immediate area lacks additional affordable housing except for one income-restricted project approximately ½ mile to the east. The site is in walking distance to two elementary schools, several parks, and high frequency transit. A Costco is the nearest store that sells grocery items, which is ½ mile away.

Metro and the City of Beaverton included criteria in the solicitation that addresses fair housing and diversity on contracting. Respondents should include a plan for the site's programming and a marketing and lease-up plan that demonstrates how the lease-up process ensures equitable access for people of color and marginalized communities, including a low barrier screening process. Respondents must also show how they can meet at 20 percent COBID hard and soft cost goals and describe how equity is addressed through their proposals to include how diversity is applied to the organization, a resident service plan for the proposed project that is inclusive and applicable to the target population, and the provision of culturally responsive and culturally specific services. These criteria are consistent with those identified in the City of Beaverton's LIS.

**TBN Building, 74<sup>th</sup> & Glisan, Portland**

Metro's TBN site addresses all of the racial equity location criteria reflected in the SAP LIS. The site is within an area with higher than the regional average population of People of Color, people with Limited English Proficiency, and people with low incomes. There are no other income-restricted projects nearby and the City of Portland's 2013 Gentrification and Displacement study identified the area as having a high risk of displacement. The site is also near several grocery stores, schools, and high frequency transit.

The future solicitation for the site will include criteria related to fair housing and diversity in contracting similar to the Elmonica Station solicitation but corresponding to the goals reflected in the City of Portland's LIS.

**Portland Value Inn, 10450 SW Barbur Blvd, Portland**

Metro has not closed on the Value Inn as of the writing of this report, however it does meet several location criteria reflected in the SAP LIS. It's within an area with higher than the regional average population of People of Color and people with Limited English Proficiency. There are no other income-restricted housing projects nearby and the site may be at risk of displacement due to its proximity to the potential Southwest Corridor MAX investment. It's adjacent to an elementary school and high frequency transit, however it's about two miles away from the nearest full service grocery store.

The future solicitation for the site will include criteria related to fair housing and diversity in contracting similar to the Elmonica Station solicitation but corresponding to the goals reflected in the City of Portland's LIS.

### 3. COMMUNITY ENGAGEMENT

**Describe your progress toward implementing your LIS strategies for ongoing community engagement (appx 750 words). Where possible, please incorporate engagement data/metrics describing the number of people/organizations engaged and demographics, if available. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. Number of people engaged, including (where possible) demographic breakdown that shows participation of communities of color and other marginalized community members (please do not share names or other identifying information)*
- b. Number of partnerships with community-based organizations, and outreach strategies used to encourage participation and mitigate barriers*
- c. Summary of engagement themes/feedback*
- d. Themes in how feedback directly informed project implementation and outcomes (emphasis on feedback from communities of color and other marginalized groups)*

The Metro SAP is continuing engagement activities to inform development outcomes on Metro-owned sites. Metro is currently organizing a stakeholder engagement process that will inform the future solicitation for the TBN Building site in Portland. The goal for this process is to consult with neighbors and stakeholders to better understand their ideas about how a new affordable housing project can bring community benefit. Metro has assembled a group of community members including people who are Black, Indigenous and other people of color, those with lived experience of housing instability, houselessness and low-income housing, and people who live and/or work in the neighborhood of the site, as a way to include the voices of future residents and neighbors in identifying community values and priorities.

Though the group may continue to grow, currently there are 17 stakeholder group members. Of these, over half are BIPOC, and over half have personal experience with houselessness. Metro will collect and report on concrete demographics once the group membership is solidified. Metro will be conducting broader community engagement partnering with these stakeholders to reach additional community members they are connected to, with similar priority groups as outlined above.

To identify stakeholder group members, Metro connected with eight culturally specific organizations, seven other community-based organizations, two churches, one elementary school and a few neighborhood businesses. Metro is offering stipends and childcare participation support to those who need them, in order to help mitigate participation barriers. Metro is also offering language access support for meetings, though currently no members have needed this accommodation.

This group will meet periodically through the spring to generate ideas for how an affordable housing building might benefit the neighborhood and community it will serve. The product from this engagement will be a statement of values/priorities that will be

included in the RFQ for developers to respond to. The group has had only two meetings as of the time of this report. Metro SAP staff anticipate adapting and applying this process to future development sites.