



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

# Agenda

Meeting: Housing Bond Oversight Committee Meeting  
Date: Monday, April 15, 2024  
Time: 3:00 p.m. to 5:30 p.m.  
Place: Virtual meeting ([Zoom link](#))  
Purpose: Discuss implementation progress with four jurisdictions.

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- 3:00 p.m. Welcome and Introductions
- 3:10 p.m. Conflict of Interest Declarations
- 3:15 p.m. Public Comment
- 3:20 p.m. Annual Progress Report: Clackamas County - *Presenting: Devin Ellin*
- LIP staff presentation: The Committee identified the questions/areas of interest for LIP presentations, in addition to any questions specific to each jurisdiction's progress report.
    - 1) *Provide an overview of where your jurisdiction is in the process of committing funds and your timeline for committing remaining funds*
      - *Metro staff will prepare 1 slide with Figure 1 from your Progress Report*
    - 2) *Share an example of a project(s) that has completed construction. What are your lessons learned on:*
      - *Equitable contracting and workforce participation*
      - *Affirmative marketing strategies, partnerships for referral and low-barrier lease up*
      - *Projects that have included Permanent Supportive Housing. Provide a description of the PSH units, % of building, population served, and service providers*
    - 3) *Share an example of a project(s) in pre-development*
      - *Share about any known financing issues including the impacts of private activity bonds shortfall, market issues, or gaps. Does the project have a PAB/LIHTC allocation?*
      - *Share about the impacts of cost escalation on housing quality. How are development partners and jurisdictions solving for cost increases?*
    - 4) *What are your overall lessons learned on the Metro AHB?*
  - Q/A and discussion
- 3:50 p.m. Break
- 4:00 p.m. Annual Progress Report: Washington County - *Presenting: Jill Chen and Andrew Crampton*
- LIP presentation – *see questions above*
  - Q/A and discussion

4:30 p.m. Annual Progress Report: Beaverton - *Presenting: Javier Mena*

- LIP presentation – *see questions above*
- Q/A and discussion

4:50 p.m. Annual Progress Report: Hillsboro - *Presenting: Chris Hartye*

- LIP presentation – *see questions above*
- Q/A and discussion

5:10 p.m. Committee discussion and reflection on themes from local presentations

5:25 p.m. Closing/Next steps

5:30 p.m. Adjourn

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានកម្មប្រតិបត្តិការរើសអើងសម្រាប់សេចក្តីណែនាំ [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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# Housing Bond Progress Report for Clackamas County | 2023

This progress report summarizes how local jurisdictions are carrying out their Affordable Housing Bond strategies. Each year, jurisdictions share progress reports with Metro, which are then reviewed by the Affordable Housing Bond Community Oversight Committee. Metro staff then create a yearly report summarizing progress across all implementing areas.

## SECTION 1: UNIT PRODUCTION AND FUNDING

This section provides a high-level overview of the Affordable Housing Bond projects and units in your jurisdiction, along with plans to leverage SHS funding for rental assistance and/or services. Please review and confirm the information in Figure 1 and let us know of any changes.

**Figure 1. Production progress and resources committed**

Project	Total Project Cost	Metro Bond Funds	Number of BOND ELIGIBLE units <i>(excludes manager units and non-eligible units)</i>					Status	Construction start <i>(anticipated or actual)</i>	Completion
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units	Number of occupants (as of Dec-2022)			
Tukwila Springs	\$ 19,418,863	\$ 5,548,542	48	48	0	48		Complete	Jun-21	Jun-22
Fuller Station Apartments	\$ 47,344,650	\$ 8,570,000	99	30	82	25		Complete	Apr-21	Sep-22
Las Flores	\$ 62,122,512	\$ 15,903,000	171	70	129	9		Construction	Oct-21	May-24
Good Shepherd Village	\$ 60,799,032	\$ 18,330,000	142	58	79	35		Complete	Mar-22	Sep-23
Mercy Greenbrae at Marylhurst Commons	\$ 42,497,871	\$ 3,000,000	100	40	83	40		Construction	Sep-22	Apr-24
Hillside Park A & B	\$ 94,617,283	\$ 25,454,545	143	40	14	0		Pre-Construction	Sep-24	Sep-26
Hillside Park C	\$ 66,013,743	\$ 14,545,455	78	68	53	0		Pre-Construction	Sep-24	Mar-26



Lake Grove	\$ 29,658,024	\$ 10,000,000	54	20	28	0		Pre- Construction	May-25	Jun-26
Shortstack Milwaukie	\$ 7,542,392	\$ 700,000	15	0	15	0		Pre- Construction	Jun-24	Jun-25
Wilsonville TOD	\$ 59,514,261	\$ 8,000,000	110	40	79	16		Pre- Construction	Jun-24	Nov-25
<b>Total committed or underway</b>	<b>\$ 110,051,542</b>	<b>960</b>	<b>414</b>	<b>562</b>						
<b>LIS commitment</b>	<b>\$122,018,094</b>	<b>812</b>	<b>333</b>	<b>406</b>						
<b>% of commitment complete</b>	<b>90%</b>	<b>118%</b>	<b>124%</b>	<b>138%</b>						
<b>Remaining for LIS</b>	<b>\$ 11,966,552</b>	<b>Goal Exceeded</b>	<b>Goal Exceeded</b>	<b>Goal Exceeded</b>						

## SECTION 2: LOCAL IMPLEMENTATION STRATEGIES UPDATE

***Please share how the development plan in your LIS is going. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:***

- a. Results of competitive selections, who was involved and how LIS criteria influenced the outcome.*
- b. How projects are efficiently using Metro bond funds and other public funding.*
- c. Summarize ongoing commitments for project-based rental assistance and supportive services as well as progress in achieving any PSH goals.*
- d. Summarize impacts of increased construction costs and private activity bond constraints on Metro bond housing projects. Please describe how the jurisdiction is working with developers to ensure housing quality and mitigate risks when projects face cost escalations, unexpected challenges, or delays related to local regulations or the changing funding landscape.*
- e. How Supportive Housing Services (SHS) funding is being integrated or leveraged to support outcomes for serving very low-income households and households experiencing or at risk of homelessness.*
- f. Describe the approach and timelines for achieving remaining unit production targets, including any priorities for remaining unit production targets, such as homeownership or supportive housing.*

### **Competitive selections and funding awards**

#### Lake Grove

The Lake Grove development is a partnership between HACC, the City of Lake Oswego (City), and Metro. The City owns six tax lots, most recently used for construction staging, at the intersection of Boones Ferry Road and West Sunset Drive in the City's Lake Grove neighborhood. The City identified the roughly 1.4 acre property as a suitable location for the development of multi-family affordable housing. In February of 2023, HACC and Metro released a developer solicitation seeking a development team to deliver 50 affordable units, including at least 20 units at 30% of AMI or less and at least 25 units with two or more bedrooms. As part of the solicitation, HACC and Metro committed to a full land value write-down Housing Bond Progress Report for Clackamas County | 2023

on the site as well as up to \$10 million in Metro Bond funds, RLRA project-based rental assistance and Supportive Housing Services (SHS) funding. Seven competitive submissions from qualified development teams were received. The submissions were reviewed by a Technical Review Committee (TRC) comprised of staff and consultants representing HACC, Metro, and the City. The TRC provided insight and information for consideration by the Community Advisory Committee (CAC). The CAC, composed of representatives from the Lake Grove Community Stakeholder group and other engaged stakeholders, selected Hacienda Community Development Corporation (CDC) to develop the site.

Hacienda CDC proposed a new construction development consisting of 55 units, including 26 one-bedroom, 25 two-bedroom, and 4 three-bedroom units. Twenty units will serve households at 30% AMI or below, and 10 of those units will be dedicated Permanent Supportive Housing (PSH) serving households referred through Coordinated Housing Access (CHA) and paired with rental assistance and services funding through the

Supportive Housing Services (SHS) Measure. New Narrative will provide supported services. The remaining 35 units will serve individuals and families in a variety of unit sizes and rents set at 60% AMI or below.

#### Wilsonville TOD

To further its LIS priority of encouraging development in high opportunity areas, HACC, with support from its Housing Advisory Board and the City of Wilsonville, allocated \$8 million in Metro bond funds to support a 121-unit affordable housing development in Wilsonville. Wilsonville and West Linn were the only remaining bond-eligible cities in Clackamas County with affordable housing needs identified in its LIS that did not have a bond-supported project in development.

The City of Wilsonville owns a 1.3-acre property at the Wilsonville Transit Center that presents an opportunity to promote transit-oriented development (TOD) with affordable housing. In 2022, the City released a Request for Qualifications/Proposals seeking a development team to build a project at the site that provides affordable housing and is an example of best practices in TOD.

In December 2022, the City awarded Palindrome Properties Group (Palindrome) the development rights to the Wilsonville Transit Oriented Development (WTOD). HACC worked closely with Palindrome and the City to integrate LIS criteria and Housing Bond production targets into the development. This integration effort resulted in the addition 20 PSH units, supported with SHS and RLRA subsidy, to the project programming. WTOD will be a mixed-use development with 121 affordable housing units over an active ground floor space. All of units will be restricted to households earning 30%, 60%, and 80% or less of AMI, including 40 units reserved for households making 30% of AMI or below. The units will be a mix of studio, one-, two-, and three-bedroom units.

#### Shortstack Milwaukie

Shortstack Milwaukie represents Clackamas County's first Housing Bond-funded home-ownership project. It will create 15 affordable homes, priced for households earning 80% AMI, through densification at the "missing middle" / "cottage cluster" scale. The project is made possible by recent up-zoning for middle housing neighborhoods and is located near amenities that working families need to thrive.

Clustered together utilizing the City of Milwaukie's recently adopted cottage cluster zoning provision, the two-story cottages, which will be built with mass timber, will be approximately 900 square feet and 2-bedroom and 1.5 bath. They will include a compact and cost efficient design that provides a modern open ground floor concept that is desirable and marketable for homebuyers. The units are intended to serve a mix of small families, couples, and individuals.

The Shortstack Milwaukie project was awarded state LIFT funds that covered 90% of its funding needs. The development team reached out to HACC seeking \$700,000 in funds to close the remaining financing gap. Given the project's alignment with the LIS and the County's goal to support homeownership opportunities, HACC's Housing Advisory Board voted to recommend the project for an award of funds. The Housing Authority Board consented.

### **Effective use of Metro bond funds and other public funding despite funding constraints and rising costs**

With 970 units in the pipeline—including 289 units completed in 2022-23, 272 units slated for completion in 2024, and 410 units expected to break ground in 2024/early 2025—Clackamas County is on track to exceed each of its unit production targets with only 84% of its total allocation committed.

Utilizing just over \$110 million in Bond funds, Clackamas County was able to leverage over \$365 million in additional public and private funding. Despite an environment of increasing construction costs and rising interest rates, portfolio-wide Clackamas County is averaging just under \$116,500 in Metro bond subsidy per unit.

### **Supportive Housing Services commitments, integration and progress toward PSH unit production**

In response to the urgent and growing need for supportive housing in the region, the development teams behind Tukwila Springs and Good Shepherd Village committed providing additional permanent supportive housing units in their projects. Clackamas County staff worked with the project sponsors to integrate SHS subsidies and RLRA rent assistance to add 59 more PSH units beyond what was originally contemplated (Tukwila Spring +36 units and Good Shepherd Village + 23 units).

In addition, each subsequently funded Metro bond project in Clackamas County's pipeline (aside from the Shortstack homeownership project) includes PSH units that are supported by SHS subsidy and/or RLRA rent assistance.

To date, Clackamas County has 231 units of PSH in its bond pipeline that are supported by services funding from the SHS or state PSH programs and paired with project-based rental assistance from RLRA or HUD.

### **Remaining unit production targets and priorities**

With the units underway in its current pipeline, Clackamas County is on track to exceed each of its production goals. The addition of the Shortstack Milwaukie project meets an important Clackamas County production target of providing affordable homeownership opportunities with Metro bond funding. As outlined in its LIS, HACC reserved nearly half of its total bond allocation to support the repositioning of its public housing portfolio. To date, HACC has committed \$40 million to subsidize the development of the first three buildings, totaling 275 units, at its Hillside Park public housing complex. HACC plans to allocate its remaining bond funds—approximately \$22 million—to support repositioning efforts at its Hillside Park and Clackamas Heights public housing developments. HACC will be submitting concept endorsement proposals for both projects, with the goal of supporting 150-200 new units, by year-end. In total, Clackamas County hopes to support the development of over 1100 new affordable units with its Metro bond allocation.

## SECTION 3: PROJECT HIGHLIGHTS

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

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

- a. Who the project intends to serve.*
- b. Project team and partnerships*
- c. Noteworthy features or highlights (e.g., community space, free wi-fi and project amenities)*
- d. How projects are incorporating sustainability, climate resilience and AC/cooling strategies to keep people safe*
- e. Anything else worth highlighting*



**TUKWILA SPRINGS: 18000 WEBSTER ROAD, GLADSTONE, OR 97027**

Located in the City of Gladstone, Tukwila Springs is the rehabilitation of a former congregate care facility into 48 units of Permanent Supportive Housing. Originally constructed in the early 1960s, the building was previously used as a nursing home and most recently as a juvenile rehabilitation center but has been vacant since 2017. The Housing Authority of Clackamas County (HACC) acquired the property in 2019 using Metro Affordable Housing Bonds. Tukwila Springs is Clackamas County's first Phase 1 Housing Bond Project.

After conferring with the Confederated Tribes of the Grand Ronde and the Mayor of Gladstone, HACC selected Tukwila Springs as the project's name. The area the housing development sits on was known for both natural springs and filbert orchards. Tukwila is the Clackamas Tribe word for Filbert.

Tukwila Springs 48 units, consisting of 40 studio & 8 single-room occupancy (SROs) unit. All units include full bathrooms and a microwave and mini-fridge. Energy-efficient heating and cooling is provided in every unit. The project includes a robust array of community amenities including an inviting community living room with a fireplace and television, a community kitchen with a spacious dining hall, a large conference room, a wellness room, an exam room with telehealth capabilities, a shared laundry room, and dedicated offices for Property Management, Resident Services, and Case Management. Free wireless internet is available throughout the building. The site design includes a landscaped courtyard, accessible resident garden beds, walking paths around the property, and covered outdoor seating areas. The project incorporates trauma-informed, sustainable, and universal design elements throughout. The project received a Multifamily Platinum certification from Earth Advantage.

All 48 units serve households with incomes 30% of AMI and below, with HUD project-based Section 8 rental assistance supporting all units. The tenant selection plan targets near-elderly (50 or older) households who are currently experiencing houselessness and have a disabling condition (SHS Population A). Leasing preferences are provided to applicants who live or work in Gladstone and/or request culturally specific supportive housing services for Native Americans. All applicants are referred through the county's Coordinated Housing Access (CHA) wait list. Wrap-around services are supported by OHCS Permanent Supportive Housing (12 units) and Metro Supportive Housing Services (36 units) funding. Home Forward provides property management and resident services and the Native American Rehabilitation Association (NARA) provides culturally specific supportive services that are available to all residents.

HACC's mission is to provide and develop affordable housing with supportive services for individuals and families on their path to improved health, wellness, prosperity, and inclusion. Tukwila Springs aligns with HACC's mission to provide deeply affordable housing and services for Clackamas County's most vulnerable residents.

HACC's team of development staff led the design team comprised of Walsh Construction, Carleton Hart Architects, and Cornerstone Management. Home Forward provides property management and resident services and NARA provides culturally specific supportive services.



Funding Sources leveraged for this project include Low Income Housing Tax Credits, Tax-Exempt Bond Financing, Metro Affordable Housing Bond, OHCS Permanent Supportive Housing Funding, Clackamas County HOME funds, Project-based vouchers from HACC, Metro Supportive Housing Services funding, Seller Financing, Deferred Developer Fee, and private funding.



**FULLER STATION APARTMENTS: 9608 SE FULLER RD, HAPPY VALLEY, OR 97086**

Fuller Station Apartments is a six-story, 100-unit development located directly adjacent to the MAX Green Line in unincorporated Clackamas County. Fuller Station consists of 17 one-bedroom units, 63 two-bedroom units, and 20 three-bedroom units. Energy-efficient heating and



cooling are provided in every unit and any unit in the building can be converted for ADA accessibility. Additionally, the three-bedroom units include in-unit washer/dryers.

Project-based Section 8 vouchers provided by HACC support 30 units reserved for households with incomes at or below 30% of AMI, including 25 PSH units reserved for households experiencing houselessness. Services funding from the Metro Supportive Housing Services measure supports the 25 PSH units. In addition, two units serve households at or below 50% of AMI, and 67 units serving households at or below 60% of AMI. There is also one unregulated manager's unit. This project achieved 100% occupancy in April 2023.

Residents benefit from amenities such as a community room with free Wi-Fi, a computer lab with free Wi-Fi, an outdoor community plaza, open-air nature playgrounds, community gardens, 83 parking spaces, secure bike storage, excellent public transit, and gathering space available to local community groups for on-site services.

Clackamas Women's Services is providing supportive housing services for the 25 PSH units. Five units are supported with project-based Mainstream vouchers and serve households with incomes at or below 30% of AMI and where the head of household is disabled and houseless or at risk of houselessness. In addition, seven units are reserved for housing insecure or houseless youth and DevNW provides housing payment assistance for these individuals.

Cornerstone Community Housing is providing resident services for all households at Fuller Station as well as additional services including transition support, stabilization support, and case management. Guardian Real Estate Services manages the property, oversees leasing, and coordinates resident services and supportive case management with its non-profit partners Clackamas Women Services and DEV NW.

Funding Sources leveraged for this project include Low-Income Housing Tax Credits, OMEP, Metro Affordable Housing Bonds and Transit Oriented Development funds, Clackamas County HOME funds, Project-based vouchers from HACC, Metro Supportive Housing Services funding, and private funding.



**LAS FLORES APARTMENTS: SOUTH MAPLE LANE COURT, OREGON CITY, OR 97045**

Las Flores, formerly known as Maple Apartments, will provide 171 homes for Oregon City residents when construction is complete in Spring, 2024. Located minutes from the Clackamas Community College campus in Oregon City, the 5-acre site rests on a hillside abutting a quiet residential neighborhood to the east and overlooking retail and commercial amenities to the west. Designed with agricultural workers, immigrants, and low-

income Oregon City families in mind, units are a mix of 1-, 2-, 3- and 4-bedrooms, with 75% being two-bedrooms and larger. Las Flores is made possible by a partnership between Community Development Partners (CDP) and Hacienda CDC.

Supported by the Agriculture Workforce Housing Tax Credit (AWHTC), 12 units are set aside for agricultural workers and their families. Las Flores will provide year-round, off-farm, permanent housing with programmatic elements designed for farm workers. An additional 31 units will be set aside for field laborers and their families. 70 project-based Section 8 vouchers will support households at or below 30% AMI and will include low-barrier leasing provisions to support vulnerable households. Las Flores includes nine units reserved for individuals and families transitioning out of homelessness. Through a partnership with Northwest Housing Alternatives (NHA), wrap-around supportive services will be offered to these households in addition to services provided by Hacienda's Youth and Family Services division.

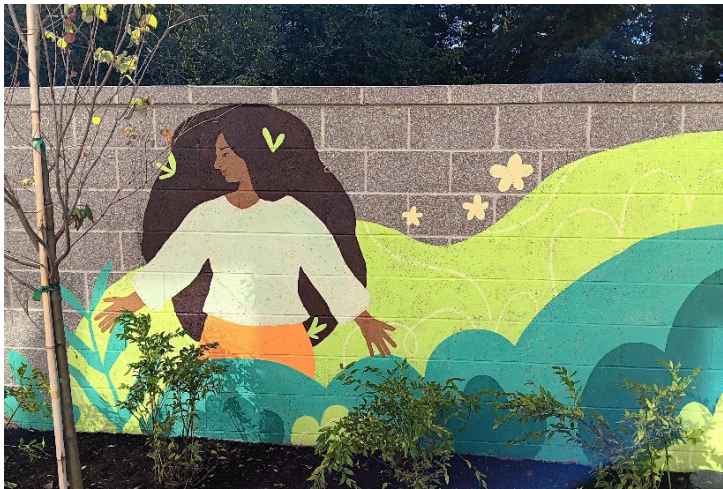
Situated in a park-like setting, the property will host a variety of outdoor amenities including a community garden space, walking paths, play areas, and outdoor picnic areas. The project will also include a community building with space for a movie and game room, a book-share library, computer stations, and a community kitchen for events and classes.

CDP and Hacienda CDC collaborated with the Center for Public Interest Design (CPID) during the early design phase of the project. CPID promotes a mode of practice that is socially conscious, environmentally sustainable, and economically accessible to all. The development team integrated PTAC heat pumps into every unit and is targeting Earth Advantage Multifamily Gold certification. Included among the project's various sustainable design elements, is a functioning solar panel array on the community building and all of the residential buildings will be solar-ready.

The design team is led by a partnership between Community Development Partners (CDP) and Hacienda CDC and comprised of Salazar Architect and LMC Construction. The project will be managed by Guardian Real Estate Services and resident services will be led by Hacienda Youth and Family Services. NHA will provide supportive services.

Funding Sources leveraged for this project include: Low-Income Housing Tax Credits, Tax-Exempt Bond Financing, Metro Affordable Housing Bond, Multifamily Energy Program, Project-based vouchers from HACC, Seller Financing, Deferred Developer Fee, and private funding.





**GOOD SHEPHERD VILLAGE: 12608 SE SKYSHOW PL, HAPPY VALLEY, OR 97086**

Good Shepherd Village has the distinction of being the first regulated affordable housing development in Happy Valley, OR. Construction was completed in fall 2023 and the property is currently leasing up. The community consists of 143 homes, 58 of which, are reserved for families and individuals experiencing houselessness (permanent supportive housing), including 15 reserved expressly for veterans. Good Shepherd Village serves priority populations with a broad range of needs based on an analysis of people living and/or working in Happy Valley.

The community was made possible, in part, by a generous donation from the Brockamp Family to Catholic Charities of Oregon (CCO). In 2012, the Brockamp Family donated the 11-acre site to CCO with the intent to have the land used for affordable housing. Included on the site is a four-acre natural area that will remain untouched, focusing the development on the remaining seven acres. As the affordable housing arm of CCO, Caritas Community Housing Corporation (Caritas Housing) works to advance equity for immigrants, refugees, and people who are houseless and vulnerable, with a special emphasis on those who are not served by other providers. Caritas Housing is the sponsor and developer of the project.

Good Shepherd Village includes one unregulated management unit, 13 studios, 50 one-bedrooms, 60 two-bedroom, and 19 three-bedroom units. The three-bedroom and several of the two-bedroom units are focused in two buildings each surrounding a small courtyard. A third building houses all the studios, one-bedrooms, remaining two-bedrooms, as well as the community rooms and office space for resident and supportive services.

This community will serve families and individuals with incomes up to 60% of the area median income. Fifty-eight (58) units will be reserved for households with incomes at or below 30% of AMI and eighty-four (84) units will be reserved for households with incomes up to 60% of AMI. VASH and HUD project-based Section 8 vouchers support 35 permanent supportive housing (PSH) units and project-based RLRA rental assistance supports 23 PSH units. Wrap-around services for all 58 PSH units are supported with Metro Supportive Housing Services funding.

In addition to the large, multi-use community room, multiple resident lounge areas were incorporated into the design based on trauma-informed design feedback received through community engagement. Community amenities include laundry facilities, secure bike enclosures, on-site parking, outdoor gathering space children's play areas, and a community garden. The project incorporates trauma-informed, sustainable, and universal design elements throughout. Earth Advantage Multifamily Gold certification is expected for all three buildings and each unit provides energy-efficient heating and cooling.

Resident and supportive services are provided by Catholic Charities of Oregon. The development team consists of WALSH Construction as the general contractor, MWA Architects providing architectural services, and the Housing Development Center providing development consulting.

Funding Sources leveraged for this project include Low-Income Housing Tax Credits, OHCS Permanent Supportive Housing Funds, OHCS Multifamily Energy Program, Metro Affordable Housing Bonds, Project-based vouchers from HACC, Metro Supportive Housing Services funding, private funding, and donated land.





**MERCY GREENBRAE APARTMENTS: 3190 FURMAN DRIVE, LAKE OSWEGO, OR 97034**

Greenbrae at Marylhurst Commons Apartments (fka Marylhurst Commons), located on the former Marylhurst University campus in Lake Oswego, will provide 100 homes for low-income families when construction is completed in spring 2024. The 4.25 parcel of land is leased by Mercy Housing Northwest (MHNW) from the Sisters of the Holy Names of Jesus and Mary (SNJM).

Mercy Greenbrae at Marylhurst Commons is a mixed-income community serving both low-income households and households experiencing or at risk of houselessness (consistent with Supportive Housing Services Population B Criteria). This community will consist of one-, two-, and three-bedroom apartments, with over 80% of the units having two or more bedrooms. Sixty (60) units will serve households at 60% AMI or below and forty (40) units will serve households at 30% AMI or below. 30% AMI units are available to households referred to the project in partnership with the Lake Oswego School District and the Housing Authority's Coordinated Housing Access program.

With this income mix, Greenbrae will provide an important opportunity for lower-wage working families to be included in the high-opportunity Lake Oswego community. Mercy Housing Northwest is working in partnership with the Lake Oswego School District to reduce the number of families with children enrolled in Lake Oswego Schools who are houseless or at risk of homelessness. The development team focused on creating comfortable and welcoming spaces and programming, including two- and three-bedroom units, to attract and accommodate families. The property will include a spacious community room with free Wi-Fi, a community kitchen, and computer workstations. Outdoor spaces will include a playground, basketball hoop, community garden space, and seating. Spacious laundry rooms will also be located on each floor.

Mercy Greenbrae will be among the largest affordable housing projects built to Passive House US (PHIUS) energy efficiency standards. The building will be 100% electric and emissions-free. It is expected to use approximately 40% less energy than comparable new construction buildings. The building will include centralized tempered and filtered air to ensure comfortable and healthy indoor air even on days when outdoor air quality is hazardous. Water-efficient fixtures, LED lighting, and high-performance windows are also included throughout the project. Furthermore, every unit is carpet-free, further improving indoor air quality and keeping maintenance demands low for residents.

On any given year, the Lake Oswego School District (LOSD) serves 30-50 households who struggle with housing insecurity. To help bridge this gap, LOSD is providing referrals for up to 25 of the 40 units set aside for households earning 30% of AMI or below. Mercy Greenbrae will be an affordable living option for these households and will ensure kids can stay enrolled in their local schools and remain integrated in their communities. Mercy Housing Northwest will also provide on-site services supported by Metro Supportive Housing Services funding. Partnerships with community organizations will be tailored to meet the specific needs of residents, as those needs become clear during the lease-up phase of the project in spring, 2024.

Pre-leasing began in late January 2024 and will continue through opening day, in April. A community Grand Opening Celebration will take place in summer, 2024. This is Mercy Housing Northwest's first property in Oregon, and they look forward to growing this partnership and expanding their presence in Oregon in the future, especially in Clackamas County. MHNW is backed by affiliate organization Mercy Housing Inc., one of the largest nonprofit affordable housing developers, owners, and operators in the country. The project was designed by Carleton Hart Architecture and is being built by Walsh Construction Company. Mercy Housing will manage the property and will provide on-site Resident Services.

Funding Sources leveraged for this project include Low Income Housing Tax Credits, OHCS LIFT, Metro Affordable Housing Bond, OHCS Multifamily Energy Program, RLRA Project-based vouchers, Metro Supportive Housing Services funding, and private funding.





**HILLSIDE PARK BUILDINGS A, B, & C: 2889 SE HILLSIDE CT, MILWAUKIE, OR 97222**

Hillside Park is an existing public housing site that currently includes 100 housing homes situated on 13.7 acres. Hillside Park was built in the early 1940s and is Oregon’s oldest public housing community. After 80+ years of operation, the aging buildings have exceeded their useful life and require recapitalization. Hillside Park Buildings A and B and Hillside Park Building C (the “Hillside Projects”) are two projects being developed on the Hillside Park site.

Combined, the Hillside Projects will bring 275 new units of amenity-rich affordable housing to households with incomes at or below 60% AMI. Of those 275 units, 221 are bond-eligible and 54 will serve as replacement units. At least 140 units will be supported with project-based Section 8 rental assistance including 21 units that will be reserved for service-enhanced permanent supportive housing (PSH) supported by Metro Supportive Housing Services funding.

Buildings A and B will be co-owned by Related Northwest (RNW) and the Housing Authority of Clackamas County (HACC), and will consist of two, four-story buildings comprising 175 units. 20 units will be reserved for households earning 30% AMI or below and 155 units will be restricted to households earning 60% AMI or below. Additionally, 13 of the 30% AMI units will be reserved for PSH.

Building C will consist of a 100-unit, four-story building that will be subsidized with project-based Section 8 rental assistance. The project will set aside 68 units restricted to households at or below 30% AMI and the remaining 32 units will be restricted to households earning 50% AMI. Among the 30% AMI units, eight will be reserved for PSH. Building C will be developed by RNW and, upon conversion to permanent financing and an approved 8609, RNW will exit the limited partnership.

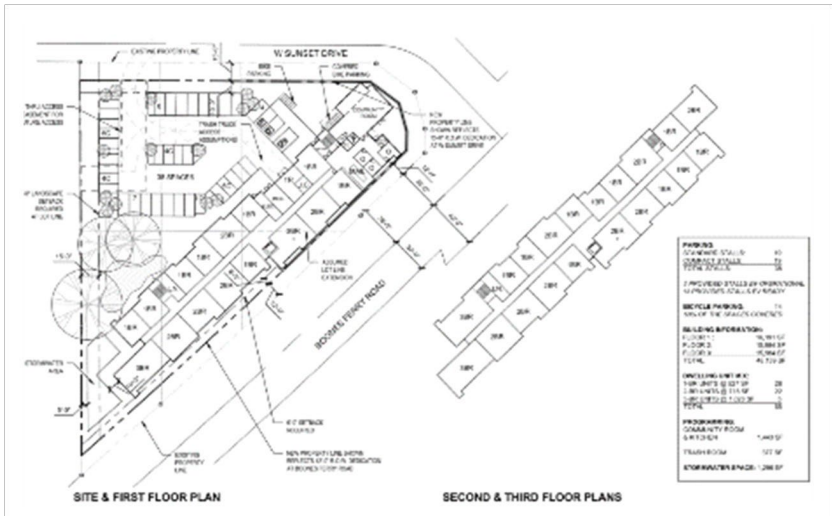
The Hillside Projects bring together RNW, a prominent local developer of affordable housing, and the Housing Authority of Clackamas County HACC, the current property owner. Ankrom Moisan Architects have been selected to design the property with Walsh Construction serving as the general contractor. The project partners have devised a project-specific resident services plan that intends to meaningfully respond to the distinctive needs of the projects' target populations. Culturally responsive and culturally specific service providers including Impact NW, Unite Oregon, Community Vision, and HACC's service team will ensure that our most vulnerable communities have the supports they need to thrive in their new housing. In order to ensure that we reach the project's target population, all three service providers will provide targeted outreach support.

The Hillside Projects will encompass extensive public improvements and infrastructure work, including a complete overall of the current street network to integrate the community into the city grid. The result will be an accessible, enriched, and pedestrian-friendly community. The development is aiming to achieve Earth Advantage Gold Certification or higher. Plans include all-electric systems, energy-efficient heat pump heating and cooling, low-impact development (LID) infrastructure elements, and solar arrays for each building.

Additionally, the project will further Clackamas County's racial equity goals by incorporating an inclusive community engagement plan, delivering culturally responsive onsite services, utilizing accessible screening criteria, and creating new affordable housing in an area with proximate access to public transit, schools, parks, shopping, health care and services in the Milwaukie core commercial area.

Anticipated funding sources include: 4% LIHTC, Regional Affordable Housing Bonds, LIFT, Tax-Exempt Bonds, Perm Debt, HOME, HOME-ARP, City of Milwaukie CET funds, TOD funds, Section 8 Vouchers, and SHS funds.





**LAKE GROVE AFFORDABLE HOUSING - 16719 BOONES FERRY ROAD, LAKE OSWEGO, OR 97035**

The Lake Grove affordable housing development is being designed on a site in Lake Oswego’s Lake Grove neighborhood, that was recently used for construction staging. The City identified the roughly 1.4-acre Property as a suitable location for the development of multi-family affordable

housing. HACC is working in partnership with Hacienda CDC, Metro, and the City of Lake Oswego to develop this much-needed affordable housing.

This community will serve a mix of families and individuals earning 60% and below the Area Median Income (AMI). This 55-unit property will provide 26 one-bedroom, 25 two-bedroom and 4 three-bedroom homes. Twenty (20) units will be rent-restricted to 30% AMI and 10 of those units will be dedicated to PSH. The 10 PSH units will be supported with RLRA project-based rent assistance and wrap-around services provided by New Narrative this is supported by SHS funding. The remaining units will serve individuals and families in a variety of unit sizes and rents set at 60% AMI or below. With the larger units and targeted outreach to communities of color, the development team hopes to assist in meeting the needs of BIPOC families in our region.

The development is aiming to achieve Earth Advantage Gold Certification or higher. Plans include 100% electric systems, energy-efficient mini-split heat pump heating and cooling, EV charging stations, and a solar system estimated to offset two-thirds of the building's total electrical needs. All electric utilities will be paid for by the owner.

The development team includes Access Architecture, a minority-owned, equity-driven architecture firm that brings quality design with a strong emphasis on community engagement; Mackenzie, a design-forward architecture firm committed to creating lasting, inclusive, and just-built environments; Colas Construction (COLAS), a minority-led seasoned general contractor with decades of affordable housing experience and a strong track-record of MWESB participation; and New Narrative, a dedicated service provider of permanent supportive housing services. The property management partner will be selected through a Request for Proposal process to ensure that the selected firm aligns with the missions of the stakeholders and the needs of the community.

Anticipated funding sources include 4% LIHTC, PABs, Regional Affordable Housing Bonds, Perm Debt, and additional sources to be determined.



### **SHORTSTACK MILWAUKIE - 3736 SE HARVEY STREET, MILWAUKIE, OR 97222**

The Shortstack Milwaukie project will deliver an innovative, replicable homeownership solution, led by a partnership between Shortstack Developers and Proud Ground. The project will create 15 affordable homes in Milwaukie, via smart densification at the “missing middle” / “cottage cluster” scale. The project leverages recent up-zoning for middle housing neighborhoods and is located near amenities that working families need to thrive.

The Shortstack development concept is a direct response to housing legislation passed recently in Oregon, including House Bill 2001 (2019); the City of Portland’s Better Housing by Design (2020) and Residential Infill Project (2021); and the City of Milwaukie’s Middle Housing Zoning Code Update (2022). These policies address the State’s desperate need for affordable housing options by creating opportunities to increase residential density for infill sites. This project also responds to affordable housing needs detailed in Governor Kotek’s Executive Order No. 23-04 which calls for the production of 36,000 housing units per year.

The homes in the Shortstack Milwaukie community will be priced for households earning up to 80% AMI. The homes feature a compact, open floorplan concept that is desirable and marketable for home buyers. These ~900sf cottages are 2-bedroom, 1.5 bath, two-story structures clustered together utilizing the City of Milwaukie’s recently adopted cottage cluster zoning provision. The units are intended to serve a mix of small families, couples, and individuals – all of whom are constituents in need of more affordable home-buying options.

The 24,300-sf site, located in the Ardenwald neighborhood, is well-connected to Milwaukie’s thriving downtown commercial center, good schools, and major employers. The site is within ½ mile of the MAX yellow line, and less than ¼ mile from several tri-met bus lines (the nearest



stop is only a block away). This community is within walking distance of Providence Hospital, Safeway, Ardenwald Elementary School, Downtown Milwaukie, and many other public amenities. Water Tower Park is a block away and the larger Mintorn North Natural Area is ½ mile. These all-electric homes are designed to exceed the energy efficiency requirements set forth by the City of Milwaukie building code and the development team is pursuing Energy Trust of Oregon’s Pathway to Net Zero Program. To round out the development team, Works Progress Architecture has been enlisted to design the property, and the general contractor will be selected via a competitive process this spring.

Anticipated funding sources include City of Milwaukie CET, OHCS LIFT, Metro Affordable Housing Bonds, a USDA Wood Innovation Grant, Proud Ground Subsidy, and conventional construction debt.



**WILSONVILLE TOD: 9749 SW BARBER STREET, WILSONVILLE, OR 97070**

The Wilsonville Transit-Oriented Development (TOD) will be a mixed-use community with 120 affordable housing units over an active ground floor space. Palindrome Properties Group (Palindrome or PPG) was awarded the development rights to the Wilsonville Transit Oriented Development (WTOD) by the City of Wilsonville in response to a competitive Request for Qualifications (RFQ).

All units will be restricted to households earning between 30% - 80% of the area median income (AMI), including 40 reserved for households making 30% of AMI or below. The homes will be a mix of studios, one-, two-, and three-bedrooms. The proposed building will be a single five-story elevator building with a landscaped plaza and a mix of on-site and proposed shared parking on the adjacent Tri-Met parcel. In addition to providing affordable housing for 120 households, Palindrome proposes to activate the ground floor with community amenities such as the SMART transit welcome center, Wilsonville Community Sharing food bank, commercial space, and resident amenities. For the commercial space,

Palindrome proposes to create a coffee shop and craft beer tap room with a focus on commuters, area employees, and neighborhood residents within walking or biking distance.

Palindrome is partnering with Latino Network, a Latino-led education organization grounded in culturally specific practices and services, to facilitate community outreach during the predevelopment period, provide referral services to the property management agent, and develop programming at the new apartment community.

The fully accessible elevator building amenities include on-site management offices, social service offices, parcel lockers, a fitness room, a multi-purpose community room, a bike room, and a laundry room. To further reduce barriers for residents, all common areas will include complimentary Wi-Fi access. Exterior amenities will include a children's playground, sports court, covered picnic tables, outdoor patio spaces, and EV charging stations.

With sustainability in mind, the project will pursue an Earth Advantage sustainability certification. Upgraded sustainable features will include a rooftop photovoltaic solar system, enhanced insulation, high-performance windows, LED lighting, Energy Star appliances, and smart thermostats in every unit. The landscape design will use native water-smart plants, and the units include low-flow water fixtures. Each residential unit will include through-wall PTAC air conditioning combined with ceiling fans in each bedroom. The common areas of the building will be serviced by roof-top condensers. The development will also include EV parking spaces on-site for residents and guests.

The development team will be comprised of Palindrome as the lead developer, the Latino Network as the service provider, PacifiCap Construction as the general contractor, and YBA Architects as the architect.

WTOD will be financed with tax-exempt bond financing, 4% Low-Income Housing Tax Credits (LIHTCs), energy tax credit equity, State grant funding for the Wilsonville SMART transit welcome center, a METRO transit-oriented development grant, deferred development fees, City of Wilsonville Land Contribution, Metro Affordable Housing Bond funding, Project-based RLRA vouchers, and Private Debt.



## SECTION 4: PERMANENT SUPPORTIVE HOUSING

This section confirms PSH unit commitments in your jurisdiction. PSH is defined as: units using coordinated access systems serving Population A (Extremely low-income individuals who have one or more disabling conditions; and are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness). Please confirm the information in Figure 2.

**Figure 2. Permanent Supportive Housing Commitments**

Project	Total Units	PSH Units	Target Population	Service Partners	Plans to leverage (SHS) Supportive Housing Services funding (Yes/No/TBD)	
					For rental Assistance	For Wraparound Services
Tukwila Springs	048	48	PSH	NARA	NO	YES
Fuller Station Apartments	99	25	PSH, Foster Youth to Independence (FYI), Asian, Latine	DevNW, Clackamas Women’s Services, Cornerstone Community Housing	NO	YES
Las Flores	171	9	PSH, Families, Ag Workers, Farm Laborers	Northwest Housing Alternatives (NHA)	NO	YES
Good Shepherd Village	142	58	Asian, Latine, Veterans, PSH	Catholic Charities of Oregon, APANO, El Programa Hispano Católico, Familias en Accion, Do Good Multnomah	YES	YES
Mercy Greenbrae Apartments	100	40	PSH, Families	Mercy Housing NW, Mercy Housing Management Group	YES	YES
Hillside Park A & B	143	13	PSH, Families	Impact NW, Community Vision, and Unite Oregon	NO	YES
Hillside Park C	78	8	PSH, Families	Impact NW, HACC Service Team	NO	YES
Lake Grove	54	10	Latine, PSH, Families	New Narrative	YES	YES
Wilsonville TOD	120	20	Latine, PSH, Families	Latino Network	YES	YES
<b>Total</b>	<b>955</b>	<b>231</b>				

HACC is currently on track to produce 231 units of permanent supportive housing.

## SECTION 5: CONTRACTING AND WORKFORCE OUTCOMES UPDATE

Local implementation strategies prioritize racial equity by setting contracting goals for COBID-certified firms and tracking workforce participation in the construction of Metro bond projects. Please review and confirm the information in Figures 3 and 4 and let us know of any changes.

**Figure 3. Equitable contracting goals and outcomes**

Project name	Developer, General contractor	Actual/expected construction completion	Contracting goals		Contracting outcome	
			% of total contract amounts paid to...		% of total contract amounts paid to...	
			Project goal (% hard costs)	Project goal (% soft costs)	Project outcome (% hard costs)	Project outcome (% soft costs)
Tukwila Springs	HACC/Walsh	Jun-22	25%	20%	22%	75%
Fuller Station Apartments	GRES/R&H	Sep-22	20%	20%	19.8%	15%
Las Flores	CDP/Hacienda CDC/LMC	May-24	20%	20%	35.7%*	35.7%*
Good Shepherd Village	Caritas/Walsh	Sep-23	20%	20%	34.03%	30.4%
Mercy Greenbrae Apartments	Mercy NW/Walsh	Apr-24	20%	20%	32.3 %*	18.7%*
Hillside Park A & B	Related NW/Walsh	Apr-26	30%	20%	TBD	TBD
Hillside Park C	Related NW/Walsh	Apr-26	30%	20%	TBD	TBD
Lake Grove	Hacienda CDC/Colas	Jun-26	25%	25%	TBD	TBD
Shortstack Milwaukie	HomeWork Development/Sister City/Proud Ground/GC-TBD	Jun-25	30%	30%	TBD	TBD
Wilsonville TOD	Palindrome/PacifiCap Construction	Nov-25	25%	25%	TBD	TBD

*\*In construction in progress, these numbers are not final*

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

Project name	Developer, General contractor	Actual/expected Construction completion	Workforce tracking?		Workforce goals			Workforce outcomes		
			Y/N	BOLI, Davis Bacon, N/A	% of total labor hours* worked by...			% of total labor hours* worked by...		
					POC	Women	Apprentices	POC	Women	Apprentices
Tukwila Springs	HACC/Walsh	Jun-22	N	Davis Bacon	N/A	N/A	N/A	N/A	N/A	N/A
Fuller Station Apartments	GRES/R&H	Sep-22	N	Davis Bacon/BOLI	N/A	N/A	N/A	100%	3%	13%
Las Flores	CDP/Hacienda CDC/LMC	Dec-23	Y	Davis Bacon	N/A	N/A	N/A	37%*	1.1%*	7.0%*
Good Shepherd Village	Caritas/Walsh	Sep-23	Y	Davis Bacon	N/A	N/A	N/A	64.3%	1.9%	13.6%
Mercy Greenbrae Apartments	Mercy NW/Walsh	April-24	Y	N/A	N/A	N/A	N/A	26.0%*	3.7%*	0.4%*
Hillside Park A & B	Related NW/Walsh	Apr-26	Y	Davis Bacon	N/A	N/A	N/A	TBD	TBD	TBD
Hillside Park C	Related NW/Walsh	Apr-26	Y	Davis Bacon	N/A	N/A	N/A	TBD	TBD	TBD
Lake Grove	Hacienda CDC/Colas	Jun-26	Y	N/A	35%	35%	35%	TBD	TBD	TBD
Shortstack Milwaukie	HomeWork Development/Sister City/GC-TBD	Jun-25	N	N/A	25%	5%	5%	TBD	TBD	TBD
Wilsonville TOD	Palindrome/ PacifiCap Construction	Nov-25	Y	BOLI	N/A	N/A	N/A	TBD	TBD	TBD

*\*In construction in progress, these numbers are not finals*

## SECTION 6: ADVANCING EQUITY IN CONSTRUCTION

***Please share progress on equitable contracting and workforce strategies in your jurisdiction. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:***

- a. Progress toward achieving equitable contracting goals*
- b. Progress toward advancing workforce participation through workforce tracking*
- c. Plans to expand local capacity to monitor and report on contracting and workforce outcomes*

### **Good Shepherd Village**

Good Shepherd Village completed construction in mid-September of 2023. With contracting goals of both 20% hard and soft costs, Good Shepherd Village (GSV) exceeded its goals with outcomes of 34% for hard costs and 30% for soft costs.

Although workforce diversity goals were not established for the Good Shepherd Village project, the percent of total labor hours worked by people of color was just over 64%, nearly 2% by women, and almost 14% for apprentices.

Early in the pre-construction phase, Good Shepherd Village's ownership team conducted direct outreach to consultants listed in the COBID database. They conducted individual informational interviews with certified firms to ascertain interest and availability and provided the opportunity to ask direct questions and learn about the project prior to responding to proposals. The ownership team made a concerted effort to communicate with MWESB subcontractors during the budgeting process and continued these efforts throughout the preconstruction period, which allowed the project team to create realistic budgets that supported their equity goals.

Additionally, the ownership team allowed for the participation of MWESB subcontractors that met equity objectives, but were not yet certified. This allowed the project to hire a woman-owned flooring company that was not initially certified but was able to become WBE certified during their work on the project.

Another example of the project's commitment to supporting MWESB businesses was demonstrated during construction when a minority-owned landscaping subcontractor was unable to complete their scope. Rather than firing the subcontractor and negatively affecting the future viability of their new business, the ownership team worked with the business on a subcontracting plan that allowed another subcontractor to finish the scope. The cost overages were equitably split between the general contractor and subcontractor. This support for growing businesses allows them to learn from early failures without resulting in their undoing.

Good Shepherd's general contractor, Walsh Construction, attended multiple minority contracting group meetings to inform MWESB subcontractors about available opportunities. In addition, the project team connected with the Professional Business Development Group, Clackamas Workforce, and the North Clackamas Chamber to find local MWESB firms to work on the project.

## Las Flores

Las Flores is currently in construction with completion slated for May of 2024. With contracting goals of 20% for both hard and soft costs, the project is currently exceeding its contracting goals for COBID-certified firms, with preliminary outcomes of 36% for both hard and soft costs. Although the project is nearing completion, these numbers are not final.

While workforce diversity goals were not established for the Las Flores project, preliminary workforce tracking shows the percent of total labor hours worked by people of color is currently 37%, 1.1% by women, and 7% by apprentices. Although the project is close to construction completion, these numbers are not final.

LMC, the General Contractor working on the Las Flores project, built relationships within the community to raise awareness and identify qualified contractors and suppliers. This outreach included:

- **Pre-bid Outreach:** LMC Construction organized pre-bid outreach events in the community to engage potential contractors and suppliers. They conducted information sessions and workshops to prepare interested firms for upcoming bid opportunities. By providing support and guidance in the bidding process, LMC aimed to create an inclusive and competitive environment.
- **Partnerships with Local Membership Groups:** LMC collaborated with local membership groups, such as chambers of commerce or local business associations, to leverage their resources and networking opportunities. These partnerships allowed LMC to tap into existing networks of minority and women-owned businesses, fostering connections and promoting their involvement in the project.
- **Utilization of LMC's Network:** LMC leveraged its network of qualified DMWESB and Section 3 firms that had prior experience on similar projects. This approach not only ensured the involvement of experienced contractors but also promoted diversity and inclusion within the project's workforce and supplier base.
- **Advertisement of Employment Opportunities:** LMC actively advertised all employment opportunities related to the project through various channels, including local newspapers, community groups, and apprenticeship programs. This approach aimed to attract a diverse pool of talent from the local community and create job opportunities for underrepresented groups.
- **Community Engagement:** LMC partnered with community groups and actively participated in local community events. This involvement helped increase awareness of the project and its benefits within the community. It also provided opportunities for direct engagement with local businesses and residents.
- **Participation in Industry Meetings:** LMC attended meetings of industry organizations such as NAMCO, and OAME to announce the project to their members. This outreach strategy helped LMC Construction connect with minority and women-owned businesses and communicate the project's potential opportunities.

LMC Construction employed several strategies from their diversity plan to assist in meeting workforce goals. Some of these strategies included:

- **Facilitating Sub-Tier Contracts:** LMC fostered opportunities for smaller contracting firms by pairing them with larger firms. This collaborative approach enabled smaller businesses to participate in projects and contribute to a more diverse contracting ecosystem.

- **Prevailing Wage Support:** LMC offered support and guidance to subcontractors in complying with prevailing wage requirements and reporting. This assistance helped subcontractors navigate the complexities of wage regulations and promoting fair compensation for workers.
- **Breaking Down Work Opportunities:** LMC broke down project work into smaller parts for subcontracting. This approach created more employment opportunities and increased the accessibility of projects to a wider range of contractors, including those from diverse backgrounds.
- **On-the-Job Training:** LMC Construction allowed on-the-job training, which included individuals with minimal previous work experience. This inclusive approach not only promoted workforce diversity, but also provided opportunities for individuals to gain valuable experience and skills in the construction industry.
- **Enhancing Targeted Recruitment:** LMC intensified their efforts to engage a more extensive and diverse audience through focused recruitment strategies.
- **Utilizing Accessible Advertising Channels:** LMC advertised job openings through channels that were easily accessible to women and apprentices, including community organizations, women's advocacy groups, and job placement centers.
- **Participating in Specialized Job Fairs and Career Events:** LMC actively attended job fairs and career events that specifically catered to women and apprentices, allowing the general contractor to establish connections with potential candidates and promote opportunities within their projects, including Las Flores.

### **Mercy Greenbrae**

Mercy Greenbrae Apartments is currently in construction with completion tracking for April 2024. With contracting goals of 20% for both hard and soft costs, the project is currently exceeding its hard cost contracting goals with preliminary outcomes of 32% for hard costs but is tracking slightly under its soft cost goal at 18.7%. Although the project is nearing completion, these numbers are not final.

Although workforce diversity goals were not established for the Mercy Greenbrae Apartments project, preliminary workforce tracking shows the percent of total labor hours worked by people of color is currently 26%, 4% by women, and 0.4% by apprentices. Although the project is close to construction completion, these numbers are not final.

The project team working on the Mercy Greenbrae project understands that setting contracting goals early on during the schematic design is advantageous. This allowed the general contractor, Walsh Construction, to identify key subcontractors early in the estimating process, and prior to bidding, to ensure both strong participation from certified firms, as well as to identify scopes that would be a better fit for smaller, emerging firms.

The project is currently tracking at 32% of total hard cost contracts paid to COBID-certified firms. This preliminary outcome represents a new high for Mercy Housing Northwest. The ownership team found that exceeding this goal was attainable without substantially altering the overall

project cost or increasing risk to the project. Mercy believes they can continue to build on the success of the Mercy Greenbrae project to achieve even higher percentage outcomes on future work.

The project is currently tracking slightly under its soft cost contracting goal. The project team shared that without engaging a certified architect, they found it difficult to reach the 20% contracting goal. Going forward, the project team will think critically about the architect scope of work and seek opportunities to engage certified firms for owner-controlled soft cost scopes. Identifying certified firms for soft cost scopes early in the development phase would help to ensure that the project could meaningfully achieve its 20% soft cost goal.

### **Shortstack Milwaukie**

The project will soon be soliciting for the project's general contractor. Requested submission materials will include the general contractor's anticipated COBID participation rates and these will be considered in the overall evaluation process for selecting the project's general contractor. It can prove more difficult to meet contracting and workforce goals for smaller projects because the pool of subcontractors used on smaller projects are not typically accustomed to hiring for jobs with contracting and workforce participation goals and usually cannot afford the additional personnel costs. Another challenge for smaller projects is that often times overarching priorities do not align.

### **Wilsonville TOD**

To date, 30.81% of project costs expended on predevelopment work were paid to COBID certified vendors. This includes work related to surveying, as well as civil, land, and structural engineering services. Palindrome is in the process of engaging a COBID certified environmental firm. Palindrome, like many other Metro Bond project developers, often have projects in Portland, which has led the organization to bake in the many of the contracting and workforce requirements into their standard practices. Palindrome allocates some project funds to provide scholarships or related support to assist interested folks into workforce related programs and jobs. This includes supporting apprenticeship programs, as well as supporting individuals, especially women, by providing situational support, such as childcare. This approach has many benefits; not only does it make a positive contribution to the overall trades, but it provides broader support and encouragement to the local workforce, in turn bolstering housing production support.

### **LCPtracker**

In 2022, Metro provided HACC with \$25,967 specifically to support the annual subscription costs of the contracting compliance and workforce reporting software called LCPtracker. HACC utilized LCP tracker on Tukwila Springs, Fuller Station Apartments, Good Shepherd Village and Las Flores. The funds Metro provided for the LCP tracker subscription was only enough to cover HACC's initial bond projects. In response, HACC is shifting the responsibility and costs of tracking goals and outcomes for newer projects to the ownership teams

LCPtracker allowed HACC to track demographics for the projects' workforce, with both the contractors and subcontractors on bond funded projects and report on actual workforce demographics. By tracking specific demographics, this data can then be analyzed and used to develop measures to increase participation for future projects.



## SECTION 7: ADVANCING EQUITABLE HOUSING OPPORTUNITY, ACCESS, AND STABILITY

The Affordable Housing Bond Program is guided by principles that aim to help those left behind by the region’s housing market. This includes communities of color, families with children, people with disabilities, seniors, veterans, and those at risk of homelessness or displacement. Each local implementation strategy outlines commitments to affirmative marketing, low-barrier lease-up, culturally responsive resident services and housing stability to those who have experienced displacement or are at risk of displacement.

**Please share updates on the following, along with any best practices, lessons learned, or opportunities for improvement:**

- a. How project locations support strategies described in your LIS, along with any location priorities for future solicitations (feel free to include a map if you can).

HACC’s 2020 NOFA gave points to priority locations described in the LIS. Location priorities included projects sited in close proximity to public transit, grocery or drug stores, medical services, libraries or senior centers, public schools, parks, recreation or community centers. Currently, all of HACC’s bond projects are located within a half mile of bus service or light rail and within one and a half miles of a grocery or drug store. The following table was included in Clackamas County’s LIS and forecasts rental housing needs over 20 years (2019-2039) by incorporated cities within the Metro boundary of Clackamas County.

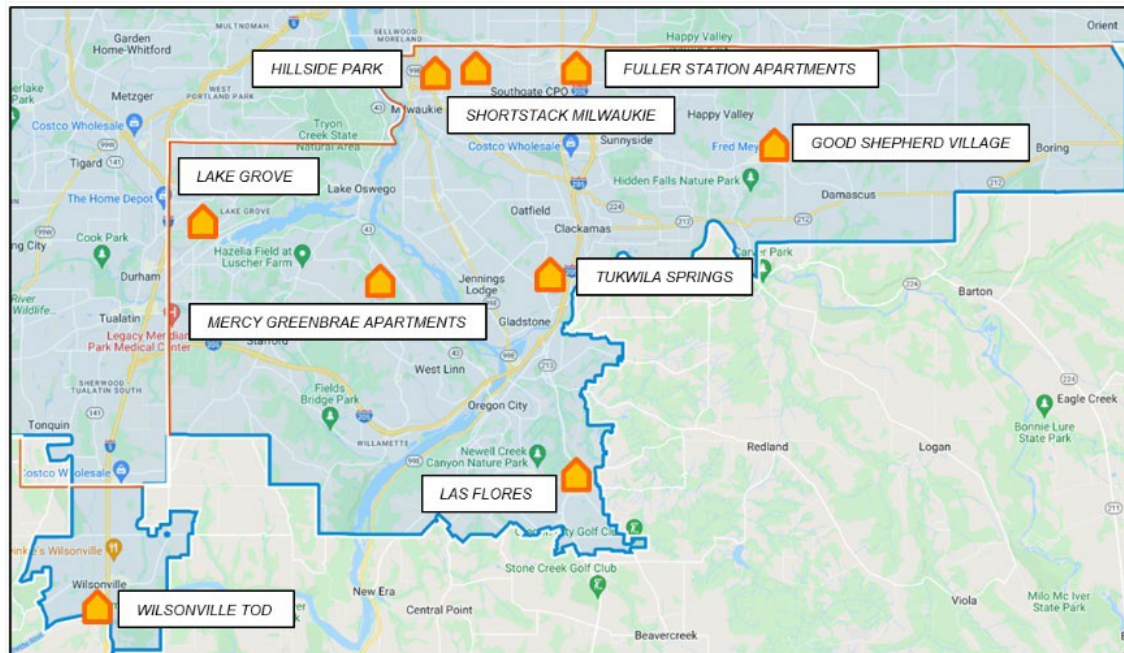
Estimated rental housing needs, based on Median Family Income (MFI) forecasted for the next twenty years (2019-2039) within the Metro boundary of incorporated cities of Clackamas County.

City*	Extremely Low Income (<30% MFI Need)	Very Low Income (30-50% MFI Need)	Low Income (50-80% MFI Need)	Total affordable rental housing need between 0-80% MFI
Gladstone	62	72	51	185
Happy Valley	473	548	1,025	2,046
Lake Oswego	198	167	198	563
Milwaukie	256	167	274	697
Oregon City	441	353	599	1,393
West Linn	98	164	102	364
Wilsonville	333	592	347	1,272

Source: U.S. Department of Housing and Urban Development. U.S. Census Bureau, 2012-2016 ACS Table 19001. The table above was included in Clackamas County's Metro Bond Local Implementation Strategy.

HACC currently has Bond-supported projects either completed, in construction, or in development in all bond-eligible cities in Clackamas County, except West Linn.

<i>JURISDICTION</i>	<i>PROJECT</i>	<i>UNITS</i>	<i>30% AMI</i>	<i>2BR+</i>
Gladstone	Tukwila Springs	48	48	0
Happy Valley	Good Shepherd Village	142	58	79
Lake Oswego	Marlyhurst & Lake Grove	154	60	112
Milwaukie	Hillside Park Redevelopment P1 + Shortstack	236	108	82
Oregon City	Maple Apartments	171	70	129
West Linn				
Wilsonville	Wilsonville TOD	120	40	79
Unincorporated	Fuller Road Station	99	30	82
<b>Clackamas County Metro Bond Pipeline Projects</b>		<b>970</b>	<b>414</b>	<b>563</b>
<b>Clackamas County Metro Bond Production Goal</b>		<b>812</b>	<b>333</b>	<b>406</b>



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

The Property Manager for Good Shepherd Village, Quantum Residential, brings over 30 years of experience managing properties to this project, many of which focus on the priority populations for Good Shepherd Village. It is standard practice at Caritas Housing's properties to conduct low-barrier screening to minimize challenges in accessing affordable housing. The leasing team knows BIPOC communities experience a vast array of barriers to accessing housing, including high and numerous rental application fees, lack of Social Security Numbers (SSN)/Cards, and/or limited rental and credit history, especially for new immigrants. Catholic Charities and Quantum worked closely to be responsive to potential barriers while acknowledging the important element of setting a clear and consistently applied policy to override the screening criteria, in the case of health or safety issues that are verifiable. Additionally, credit score minimums were not a factor in our lease-up processes, alternative forms of identification besides SSN were accepted, a lack of rental history or rectified past debt were not penalized, and the leasing team worked with community partners to establish application fee assistance for their clients and referrals.

For the Hillside Projects, Related NW and HACC are making a concerted effort to break down barriers to access for marginalized populations by working closely with community partners to assess the potential impacts of screening criteria and develop criteria that align with the building's service capacity but does not create disproportionate barriers to certain populations. Several strategies will be employed at the project to provide equitable access, including:

- Screening will include a consistently applied override policy for reviewing prospective tenants' credit, rental, and criminal histories.
- Linguistically appropriate materials that reflect community demographics to provide access to priority communities and help ensure equitable access to communities of color.
- On-site management and staff will receive diversity, equity, and inclusion training and will be educated to understand the specific target population goals of the project. Importantly, management will endeavor to hire staff and vendors representative of the community.

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

All units receiving SHS funding or project-based rental assistance from HACC are/will be referred through the County's Coordinated Housing Access (CHA) waitlist. HACC has been offering service packages—that pair rental assistance with wrap-around services—to project sponsors to encourage them to support dedicating additional PSH units in their bond-funded projects.

Applicants seeking PSH at Tukwila Springs, Fuller Station Apartments, Good Shepherd Village, Las Flores, and Mercy Greenbrae are/will be referred through Clackamas County's Coordinated Housing Access (CHA). Tukwila applicants have been prioritized in one of two ways- with a preference for applicants living in Gladstone or applicants who are working with a culturally specific agency that supports Native Americans. Tukwila Springs partnered with Native American Rehabilitation Association (NARA NW) to provide referrals because Native American applicants

are chronically underserved across Clackamas County’s programs. Referrals are sent by NARA NW to the CHA system where they are screened and referred to Tukwila Springs. NARA NW identifies individuals who meet eligibility criteria and are receiving services at various NARA NW sites (including medical and behavioral health sites) or who have been referred to NARA by other community agencies serving homeless individuals (i.e. DoGood Multnomah, Bybee Lakes Hope Center.)

Support from Resident Services and onsite Case Management has been critical for leasing PSH units. Catholic Charities’ Resident Services team works with all PSH referrals to make initial contact, walk prospective tenants through the application process, help them assemble the needed documents, and be their main point of contact for questions and any needs that arise. The team strives to remove barriers by meeting PSH applicants in person and problem-solving any challenges related to the application process. They also coordinate closely with the Housing Authority and Quantum Residential to make sure all the necessary information for both application processes is being collected in order to reduce the need for corrections. The Resident Services team submits each completed application to the Housing Authority and follows up to track progress and help ensure applicants are able to attend a program orientation to secure their voucher. To support a comfortable move-in process for PSH tenants, Resident Services procured and distributed “household basics” (essential furniture, bedding, kitchen and bathroom supplies, and more) to each PSH unit to set tenants up with the necessities for their new home.

*d. Partnerships that align culturally specific/responsive services that meet the needs of residents (Figure 5).*

**Figure 5. Summary of project plans and partnerships for affirmative marketing and culturally responsive services**

Project name	Who the project seeks to serve	Plans/partnerships for affirmative marketing	Plans/partnerships for culturally responsive services
Tukwila Springs	PSH	Home Forward, NARA, CHA	NARA
Fuller Station Apartments	PSH, Foster Youth to Independence (FYI), Asian, Latine	Asian Health & Service Center, IRCO, NAYA, Urban League of Portland, El Programa Hispano Católico, Oregon Outreach, Impact NW, Independent Living Resources, Clackamas County Social Services & CHA	DevNW, Clackamas Women’s Services, Cornerstone Community Housing
Good Shepherd Village	Asian, Latine Veterans, PSH	NARA, Asian Family Center, NAACP, JOIN, NW Pilot Project, Clackamas County Social Services & CHA	Catholic Charities of Oregon, APANO, El Programa Hispano Católico, Familias en Acción, Do Good Multnomah
Las Flores (fka Las Flores (fka Maple) Apartments)	Farmworkers and their families, Latine, PSH	Hacienda CDC, NAYA, El Programa Hispano Católico, NHA, Urban League of Portland, Asian Health & Service Center, IRCO, Impact NW, Clackamas County Social Services & CHA	Hacienda CDC, NHA

Mercy Greenbrae Apartments (fka Marylhurst Commons)	PSH, Families	Lake Oswego School District, YMCA of Great Portland, Clackamas Workforce Partnership, Northwest Family Services, Clackamas Children's Commission, and the Clackamas Children's Center	Mercy Housing NW, Mercy Housing Management Group
Hillside Park A & B	PSH, Families, Individuals living with disabilities, BIPOC households	Impact NW, NHA, Community Vision, Unite Oregon	Impact NW, Community Vision, Unite Oregon
Hillside Park C	PSH, Families, BIPOC households	Impact NW, HACC, NAYA, Latino Network, Urban League, IRCO, and Portland Homeless Family Solutions.	Impact NW, HACC Service Team
Lake Grove	Latine, PSH, Families	New Narrative	New Narrative
Shortstack Milwaukie	Families, BIPOC	Shortstack and Proud Ground	Partnerships to be confirmed as part of marketing and outreach plan.
Wilsonville TOD	Latine, PSH, Families	Latino Network, Asian Health and Service Center, POIC +RAHS	Latino Network

*e. Physical accessibility features (Figure 6)*

**Figure 6. Physical accessibility features**

Project name	Number of ground floor units	Number of ADA (Type A) units	Universal design (Y/N)
Tukwila Springs	48	28	Y
Fuller Station Apartments	10	5	Y
Good Shepherd Village	32	8	Y
Las Flores (fka Maple) Apartments	57	9	Y
Mercy Greenbrae Apartments (fka Marylhurst Commons)	23	5	Y
Hillside Park A & B	52	10	Y
Hillside Park C	19	5	Y
Lake Grove	17	4	Y
Shortstack Milwaukie	15 Townhomes	0	Y
Wilsonville TOD	13	3	Y



## SECTION 8: COMMUNITY ENGAGEMENT TO INFORM PROJECT OUTCOMES –

Jurisdictions prioritize racial equity by engaging people of color and historically marginalized communities in shaping project design and outcomes.

Please share a summary of community engagement efforts in 2023 (Figures 7 and 8). Please address:

- a) WHO was engaged
- b) WHAT activities were done
- c) WHAT themes came from the engagement, and
- d) WHAT changes were made in response to project design and/or resident services programming

If applicable, describe any partnerships used to support reaching community members.

**Figure 7. WHO WAS ENGAGED: Summary of community engagement demographics (add rows as needed)\***

Project or engagement event	Total participants	Were demographics tracked? (Y/N)	If yes, how many voluntarily reported demographics?	Of those reporting demographics...						
				% people of color	% people with low incomes	% older adults (over 60)	% limited English proficiency	% immigrants and refugees	% existing tenants in building	% people who have experienced homelessness
HSP A & B -Focus Group	10	Y	10	22%	100%	N/A	40%	20%	100%	N/A
HSP C – Focus Group	10	Y	10	22%	100%	N/A	40%	20%	100%	N/A
HSP A & B – Local Stakeholder Meetings	40	N								
HSP – Public Town Hall	40	N								
Hillside Park (HSP) A & B – Stakeholder Interviews	8	N								
HSP C – Stakeholder Interviews	8	N								
HSP A & B – Public Town Hall	20	N								
HSP C – Public Town Hall	20	N								
HSP A & B – Focus Group	10	Y	10	22%	100%	N/A	40%	20%	100%	N/A
Lake Grove	10 identified	Anticipated, Y								
Wilsonville TOD	30	Y	80.0%	79.2%	85.0%	N/A	33.3%	41.7%	N/A	N/A

**Figure 8. ENGAGEMENT ACTIVITIES, THEMES AND OUTCOMES (add rows as needed)**

<b>WHAT YOU DID</b> Include engagement done by developers/CBOs on all your projects in 2022. List community engagement activities such as “focus group,” “3 listening sessions,” “survey,” etc.	<b>WHAT YOU HEARD</b> Summarize major themes of feedback from each engagement activity, e.g. “more large units,” “more garden space,” “preferred cool exterior colors,” etc.	<b>WHAT YOU CHANGED</b> Summarize what changes were made to project in response to each theme of feedback, e.g. “added 5 more three- and four-bedroom units,” “increased garden space,” etc.
<b>Hillside Park A &amp; B - Stakeholder Interviews</b> Conversations with individual stakeholders, including service providers, Providence Hospital, and government departments.	Importance of culturally specific services.	Revised initial service plan to integrate PSH and committed to serving special needs population (individuals living with disabilities).
<b>Hillside Park A &amp; B - Stakeholder Meeting Updates.</b> Project updates with neighborhood associations.	Supportive relocation, the importance of green space as a priority, bike lanes, and parking solutions were discussed.	No major design changes—neighborhood groups were largely asking for clarifications around our approach to transportation and parking.
<b>Hillside Park A &amp; B - Focus Groups.</b> Hosted two focus groups with current residents to talk about exterior amenities and unit layouts.	Priority for universal design elements, walking paths, community gardens, and walk-through closet	Increased engagement with universal design and number of Type A units in Building C. Integrated walking paths into the landscape plan. Committed to walk-through closet layout for 1-bedroom units. Matched community plaza north of Building A with aesthetic preferences.
<b>Hillside Park A &amp; B - Public Town Hall.</b> Hosted a virtual public town hall to provide development updates.	Participants vocalized the importance of community garden spaces and asked for clarifications about how the team was delivering on the master plan.	Added garden boxes to Buildings A & B landscape plan.
<b>Hillside Park C - Stakeholder Interviews</b> Conversations with individual stakeholders, including service providers, Providence Hospital, and government departments.	Importance of culturally specific services.	Revised initial service plan to integrate PSH and committed to serving special needs population (individuals living with disabilities).
<b>Hillside Park C - Stakeholder Meeting Updates.</b> Project updates with neighborhood associations.	Supportive relocation, the importance of green space as a priority, bike lanes, and parking solutions were discussed.	No major design changes—neighborhood groups were largely asking for clarifications around our approach to transportation and parking.
<b>Hillside Park C - Focus Groups.</b> Hosted two focus groups with current residents to talk about exterior amenities and unit layouts.	Priority for universal design elements, walking paths, community gardens, and walk-through closets.	Increased engagement with universal design and number of Type A units in Building C. Integrated walking paths into the landscape plan. Committed to walk-through closet layout for 1-bedroom units.

<p><b>Hillside Park C - Public Town Hall.</b> Hosted a virtual public town hall to provide development updates.</p>	<p>Participants vocalized importance of community garden spaces and asked for clarifications around how team was delivering on master plan.</p>	<p>Increased scope of community garden in Building C.</p>
<p><b>Lake Grove – Community Engagement Website.</b> In 2023, Hacienda and Access Architecture developed and launched a community engagement website allowing community stakeholders to stay informed and learn about engagement events throughout the process. <a href="https://www.engagewithlakegrove.com/about">https://www.engagewithlakegrove.com/about</a></p>	<p>The project engaged in social media outreach and 1:1 conversations with project local organizations and individuals. The goal is to identify community representatives to participate in an advisory-like focus group (Lake Grove United) for feedback on the project. In early 2024, via a virtual gathering, the Lake Grove United Group will kick off meetings with plans to convene 5-8 times throughout the year. The first project open house will take place on Feb 22<sup>nd</sup>.</p>	<p>N/A</p>
<p><b>Shortstack Milwaukie</b> - In November 2023, the Shortstack Milwaukie development team held a second pre-application meeting with City of Milwaukie planning staff to review community design guidelines and updated cottage cluster planning/zoning requirements.</p>	<p>N/A</p>	<p>N/A</p>
<p><b>Wilsonville TOD</b> - As part of the Equitable Housing Plan process, the development team conducted stakeholder and public engagement to understand housing challenges and possible solutions.</p>	<p>The top interior amenities requested: Extra Storage, Library/Study Rooms, Craft Room and large refrigerators in the 3-bedroom units Top outside features requested: Playground/Outdoor Gym, Green Areas/Community Gardens, Covered Areas, Security Cameras Top onsite services requested: Bilingual Signs/Staff, Childcare, Cultural Events, Internet/Free Wi-Fi, Group Fitness Classes</p>	<p>With the exception of the craft room, it is anticipated that all requested amenities can and will be incorporated into the development or provided by Latino Network, the proposed service provider.</p>

## SECTION 9: INITIAL APPLICATION AND LEASING OUTCOMES

*For projects that are currently leasing or have completed the initial leasing process, please share any progress, lessons learned or best practices related to application and leasing strategies.*

Good Shepherd Village was the first regulated affordable housing development within the city of Happy Valley, providing stable, affordable housing in an amenity-rich area serving disadvantaged households. Good Shepherd Village was the only HACC project that went through leasing in 2023.

The lease-up for Good Shepherd Village is currently underway and the project is 52% occupied. Regular meetings between HACC, Catholic Charities Resident Services, Quantum Residential, and the Caritas Housing development team have been critical to a successful leasing process. This close collaboration between all partners has helped streamline communication and ensure that tenants, especially those exiting homelessness, receive the support they need throughout the application process. Weekly monitoring of progress towards monthly move-in goals has helped the team address roadblocks and keep lease-up on track. The leasing team also established clear procedures and timelines for outreach in order to ensure tenants receive adequate communication and time to assemble documentation, while also moving through the waitlists efficiently.

# Housing Bond Progress Report for Washington County | 2023

This progress report summarizes how local jurisdictions are carrying out their Affordable Housing Bond strategies. Each year, jurisdictions share progress reports with Metro, which are then reviewed by the Affordable Housing Bond Community Oversight Committee. Metro staff then create a yearly report summarizing progress across all implementing areas.

## SECTION 1: UNIT PRODUCTION AND FUNDING

This section provides a high-level overview of the Affordable Housing Bond projects and units in your jurisdiction, along with plans to leverage SHS funding for rental assistance and/or services. Please review and confirm the information in Figure 1 and let us know of any changes.

**Figure 1. Production progress and resources committed**

Project	Total Project Cost	Metro Bond Funds	Number of BOND ELIGIBLE units <i>(excludes manager units and non-eligible units)</i>					Status  <i>Pre-construction, construction, complete</i>	Construction start  <i>(anticipated or actual)</i>	Completion
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units	Number of occupants (as of Dec-2023)			
Cedar Rising	\$33,661,515	\$10,230,000	81	33	50	0	39	Complete	Apr-22	Dec-23
Heartwood Commons	\$10,045,608	\$9,283,000	54	54	0	54	31	Complete	Dec-21	Mar-23
Plambeck Gardens	\$43,583,824	\$14,700,000	116	47	60	8		Construction	Apr-23	Oct-24
Altura	\$33,283,866	\$12,000,000	74	14	45	0		Construction	Sep-22	Jun-24
Plaza Los Amigos	\$43,972,319	\$13,670,523	112	26	72	16		Construction	Jul-22	Apr-24
Opal Apartments	\$21,113,400	\$6,149,000	54	28	9			Construction	Jun-22	Mar-24
Terrace Glen	\$54,176,941	\$17,484,000	144	51	74	3	260	Complete	Jan-21	May-23
The Valfre at Avenida 26	\$13,603,343	\$3,792,088	36	8	30	8	92	Complete	Sep-21	Oct-22



Alongside Senior Housing	\$25,586,313	\$6,270,000	57	23	0	24	64	Complete	Jul-22	Sep-23
Viewfinder	\$32,951,190	\$11,583,000	81	34	56	30	189	Complete	Jul-20	Dec-21
Woodland Hearth	\$35,287,381	\$9,450,000	63	24	40	0		Pre-construction	Oct-24	Apr-26
<b>Total committed or underway</b>	<b>\$114,611,611</b>	<b>872</b>	<b>342</b>	<b>436</b>						
<b>LIS commitment</b>	<b>\$118,135,532</b>	<b>814</b>	<b>333</b>	<b>406</b>						
<b>% of commitment complete</b>	<b>97%</b>	<b>107%</b>	<b>103%</b>	<b>107%</b>						
<b>Remaining for LIS</b>	<b>\$3,523,921</b>	<b>Goal Exceeded</b>	<b>Goal Exceeded</b>	<b>Goal Exceeded</b>						

\*SEE PSH SECTION FOR NOTES ON CHANGES TO PSH UNIT COUNT

## SECTION 2: LOCAL IMPLEMENTATION STRATEGIES UPDATE

***Please share how the development plan in your LIS is going. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:***

*a. Results of competitive selections, who was involved and how LIS criteria influenced the outcome.*

In fall 2022, Washington County put out a NOFA for the remaining \$13 million available in Washington County’s Eligible Share of Metro Housing Bond funds. Staff conducted an initial review to ensure that applications were complete and complied with the framework requirements and application instructions. A Review Committee was convened with four members who were volunteers or Washington County staff with expertise in affordable housing. The Committee reviewed the application materials, the consultant reports prepared by High Impact Financial (engaged to evaluate project feasibility and financial characteristics) and conducted a meeting to discuss questions and share perceptions about the applications. The Review Committee members then individually rated the applications and provided comments regarding their scoring. Staff tabulated the Committee scores to produce an average score for each application. First, second and third place ranked applications were consistent across all review committee members. CPAH/Woodland Hearth \$9,450,000: The Woodland Hearth project by Community Partners for Affordable Housing (CPAH) received the highest score which was unanimous among the reviewers. Woodland Hearth had the highest percentage of family sized units, the highest percentage of 3- and 4-bedroom units, the highest percentage of 30% AMI units, the highest percentage of PSH units, and the most financial sources already secured.

To pair operational and debt-leverage assistance for the PSH Units, CPAH applied for funding for OHCS units and were awarded funding in summer 2023. CPAH is moving towards a financial closing in Fall 2024.

*b. How projects are efficiently using Metro bond funds and other public funding.*

Washington County has worked closely with project partners to explore all avenues for potential funding gaps to ensure Metro Bond commitments are able to deliver projects consistent with all Final Endorsement commitments. To give an example, Woodland Hearth is facing project gaps due to infrastructure requirements related to a gravity-fed pump station required by the City of Tigard as a land use condition of approval for the project. Washington County is seeking Board of County Commissioners authorization to request funding to address the project gap in the Federal Government's Fiscal Year 2025 Congressionally Directed Funding Proposed Projects for Consideration. This shows the priority Washington County brings to support Metro Bond projects by advocating for a variety of public funding to be paired with Metro Housing Bond funds.

*c. Summarize ongoing commitments for project-based rental assistance and supportive services as well as progress in achieving any PSH goals.*

Washington County has exceeded the 100-unit PSH goal established in the LIS, and delivered through its Housing Authority the first all-PSH multifamily project in Washington County, Heartwood Commons. While the team is actively working on a lease-up improvement strategy for the building, it should be acknowledged that lease up at the Heartwood has faced challenges and, as the first HAWC PSH development, the county is learning along the way and making iterative changes to bring rehouse people and get the building leased up.

Initial staffing posed an issue, particularly with property management staff. It took some time to get to a fully staffed building. One of the service providers decided a couple of months in that this was not a good program fit for their agency and backed out of the contract. In order to adjust to these staffing challenges, there was an intentional leasing slowdown in moving in new residents for a few months to address appropriate staff ratio and resident safety issues. Last fall when leasing was set to increase, there were issues within our referral process through our Coordinated Entry system. In response to those challenges, we built a new direct referral path specifically for PSH services. This has been in place since early January and has resulted in increased successful referrals. With this new referral path and staff capacity in place, we are on track to have the building leased up by April 1.

Heartwood's leasing process was an important lesson in what it takes to make PSH work for Washington County, using both capital and operating funding sources. We're learning lots of lessons with the Heartwood and this will help us do better with our next round of PSH investments with our community partners.

Metro is in the beginning stages of engaging stakeholders to create a regional definition of Permanent Supportive Housing (PSH). Metro also plans to create regional recommendations on PSH eligibility and funding standards. Washington County staff have worked to clarify PSH definitions in projects that receive RLRA vouchers or other supportive rent assistance to support deeply affordable units. County Housing staff are working to ensure all reporting reflects this updated alignment effort to both define PSH and successful pair SHS voucher and operations funding will Metro Housing Bond funded projects.

- d. *Summarize impacts of increased construction costs and private activity bond constraints on Metro bond housing projects. Please describe how the jurisdiction is working with developers to ensure housing quality and mitigate risks when projects face cost escalations, unexpected challenges, or delays related to local regulations or the changing funding landscape.*

Washington County staff actively attend OAC and construction draw meetings as projects undergo construction to ensure that value-engineering discussions are balanced with delivering quality housing in the face of cost escalations and other funding challenges. Six of the 12 projects in Washington County's jurisdiction have been completed, so that mitigates future program risk as a substantial amount of unit goals have already been delivered. In addition, the County does balance the need to deliver high-quality projects with also minimizing utilizing additional Metro Housing Bond funds. Two projects did request additional Metro Housing Bond funds during construction, Heartwood Commons and Opal Apartments. Those two-projects received additional funding due to unique circumstances from expected existing site conditions that occurred during construction, and the funding was necessary to successfully advance both projects. Prior to requesting additional Metro Housing Bond funds, staff worked with the Opal Apartments sponsor to require them to maximize their deferred developer fee and the permanent loan amount, as well as supporting their application for additional funding sources through OHCS and the Department of Human Services.

Staff are closely monitoring the remaining projects four under construction to ensure they can be successfully delivered without comprising quality and services. In addition, staff are supporting the two remaining projects in pre-development, the Aloha 209<sup>th</sup> project and Woodland Hearth, to ensure they can successfully close. The County has \$3.5 million in remaining Metro Housing Bond funds that will be used to successfully complete the Program in the County and ensure all LIS unit production goals are exceeded as expected.

- e. *How Supportive Housing Services (SHS) funding is being integrated or leveraged to support outcomes for serving very low-income households and households experiencing or at risk of homelessness.*

SHS funds are integrated into affordable housing sites to provide a mix of case management services, resident services, resident flex funds, enhanced property management support, and additional building operations dollars to support low income, high acuity chronically homeless households as well as the developments themselves. Some of these services are co-located on site, like at

Heartwood Commons, to best support those high needs households in achieving long term housing stability. SHS funded RLRA vouchers have also been layered into some properties to increase the amount of PSH units within an affordable community.

The Washington County SHS team is working closely with the county's leadership and development team to create a SHS Development NOFA. This NOFA will focus on providing capital dollars to create a wide range of supported housing in the county, matched with operations funding also from SHS, to fill gaps in our housing continuum.

- f. Describe the approach and timelines for achieving remaining unit production targets, including any priorities for remaining unit production targets, such as homeownership or supportive housing.*


Washington County has met all unit production targets. For the remaining \$3.5M in Metro bond funds, Washington County staff are accessing options to fully utilize these remaining funds, and will be providing an update this spring 2024 on the direction to fully utilize the remaining allocated amount for the County. This will likely consist of supporting a project under development utilizing Metro Housing Bond funds that has not yet reached financial closing.

### SECTION 3: PROJECT HIGHLIGHTS

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


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

- a. Who the project intends to serve.*
- b. Project team and partnerships*
- c. Noteworthy features or highlights (e.g., community space, free wi-fi and project amenities)*
- d. How projects are incorporating sustainability, climate resilience and AC/cooling strategies to keep people safe*
- e. Anything else worth highlighting*

<p style="text-align: center; font-size: 24pt; font-weight: bold;">Completed</p>	<p><b>Viewfinder</b> - Community Development Partners &amp; Housing Authority of Washington County - 81 units - Tigard</p> <p><i>Population to be served:</i> Individuals and Families; 8 units set-aside for Veterans</p> <p><i>Leveraged Funding Sources:</i> 4% LIHTC, SDC Exemption</p> <p><i>Service Partnerships:</i> Good Neighbor Center &amp; Veterans Administration</p> <p><i>Development Team:</i> Bremik Construction &amp; Scott Edwards Architecture</p> <p><i>Project Highlights:</i> 11 units of PSH were added to the project in collaboration with the Supportive Housing Services Program. Community room and outdoor courtyard on second floor; playground onsite. Building features art by three local artists. All units have air conditioning. Building is equipped with solar power.</p>	
	<p><b>Valfre at Avenida 26</b> – DCM Communities &amp; Housing Authority of Washington County - 36 units – Forest Grove</p> <p><i>Population to be served:</i> Individuals and Families; 8 PSH units</p> <p><i>Leveraged Funding Sources:</i> 4% LIHTC, Washington County Housing Production Opportunity Fund</p> <p><i>Service Partnerships:</i> Bienestar &amp; Sequoia Mental Health</p> <p><i>Development Team:</i> LMC Construction &amp; Carleton Hart Architecture</p>	



	<p><i>Project Highlights:</i> All units have air conditioning. Project built on previous cement mixing plant, providing important infill development. Community space and playground onsite.</p>	
	<p><b>Terrace Glen</b> – Related NW &amp; Housing Authority of Washington County - 144 units – Tigard</p> <p><i>Population to be served:</i> Individuals and Families; 3 PSH units</p> <p><i>Leveraged Funding Sources:</i> 4% LIHTC, Metro Transit Oriented Development, SDC Exemption</p> <p><i>Service Partnerships:</i> HomePlate Youth Services, EngAge, &amp; IRCO</p> <p><i>Development Team:</i> Walsh Construction &amp; C2K Architects</p> <p><i>Project Highlights:</i> All units have air conditioning. Project includes 3 4-bedroom units. Community room and playground onsite. All units have air conditioning.</p>	
	<p><b>Heartwood Commons</b> – Housing Authority of Washington County - 54 units – unincorporated Washington County</p> <p><i>Population to be served:</i> Individuals – all PSH units</p> <p><i>Leveraged Funding Sources:</i> Housing Production Opportunity Fund (Wa. Co.), Housing Authority of Washington County Local Development Fund</p> <p><i>Service Partnerships:</i> CPAH, Bienestar, Sequoia Mental Health</p>	

	<p><i>Development Team:</i> GSI Builders, Inc., Ink Built Architecture</p> <p><i>Project Highlights:</i> Motel conversion project. Washington County’s first all PSH project. All units have air conditioning.</p>	
	<p><b>Cedar Rising</b> – BRIDGE Housing - 82 units – unincorporated Washington County</p> <p><i>Population to be served:</i> Individuals and Families</p> <p><i>Leveraged Funding Sources:</i> 4% LIHTC, Local Innovation and Fast Track (LIFT) Funding, Metro Transit Oriented Development funds, Washington County Housing Production Opportunity Fund</p> <p><i>Service Partnerships:</i> Hacienda CDC</p> <p><i>Development Team:</i> LMC Construction &amp; Scott Edwards Architecture</p> <p><i>Project Highlights:</i> Units range in size from studio to 3-bedroom. Community room, outdoor play area, BBQs, and raised garden beds onsite. All units have air conditioning.</p>	

	<p><b>Alongside – Northwest Housing Alternatives - 58 units – Tigard</b></p> <p>Population to be served: Seniors</p> <p>Leveraged Funding Sources: 4% LIHTC, HOME (Wa. Co.)</p> <p>Service Partnerships: Veterans Administration, SAGE Metro Portland, DAVS Washington County</p> <p>Development Team: Walsh Construction &amp; SERA Architects</p> <p>Project Highlights: Located directly adjacent to the Tigard Senior Center. Provides 23 units of Permanent Supportive Housing for seniors. Located with pedestrian access to Fanno Creek Trail.</p>	
<p style="text-align: center;"><b>Under Construction</b></p>	<p><b>Altura– BRIDGE Housing - 75 units – Beaverton</b></p> <p><i>Population to be served:</i> Individuals and Families</p> <p><i>Leveraged Funding Sources:</i> 4% LIHTC, SDC Exemption, Housing Production Opportunity Fund (Wa. Co.), City of Beaverton</p> <p><i>Service Partnerships:</i> Hacienda CDC</p> <p><i>Development Team:</i> Colas Construction &amp; Salazar Architects</p> <p><i>Project Highlights:</i> Located in high opportunity area (South Cooper Mountain). Community room and playground onsite. All units have air conditioning.</p>	

**Plaza Los Amigos** - REACH CDC & Bienestar - 113 units  
– Cornelius

*Population to be served:* Individuals and Families

*Leveraged Funding Sources:* 4% LIHTC, Weatherization funds, Metro Transit Oriented Development Funds, Wa. Co. Housing Production Opportunity Funds, American Rescue Plan Act (ARPA) funds, Energy Trust of Oregon, PGE.

*Service Partnerships:* Sequoia Mental Health Services

*Development Team:* LMC Construction & Ankrom Moisan Architects

*Project Highlights:* 16 Permanent Supportive Housing (PSH) units. Solar power array onsite. Units range in size from 1 to 3-bedrooms. Site features fustal court, community room, community garden and pedestrian connection to local park.



**Opal** - Home First Development & Christ United Methodist Church - 53 units – unincorporated Washington County

*Population to be served:* Seniors (emphasis on LGBTQIA+ community)

*Leveraged Funding Sources:* 4% LIHTC


*Service Partnerships:* Bienestar, SAGE, Friendly House

*Development Team:* Beaudin Construction & Doug Circosta Architects

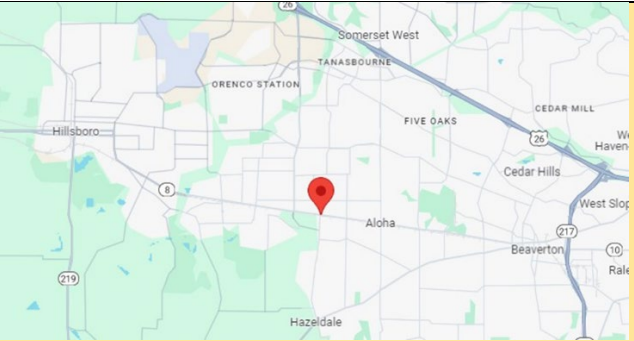
*Project Highlights:* 24 Permanent Supportive Housing (PSH) units for seniors.





	<p><b>Plambeck Gardens</b> – Community Partners for Affordable Housing - 116 units – Tualatin</p> <p><i>Population to be served:</i> Individuals and Families</p> <p><i>Leveraged Funding Sources:</i> 4% LIHTC, Washington County Housing Production Opportunity Fund, City of Tualatin, HOME (Wa. Co.), ARPA,</p> <p><i>Service Partnerships:</i> Centro Cultural, Neighborhood Health Center</p> <p><i>Development Team:</i> LMC Construction &amp; Carleton Hart Architecture</p> <p><i>Project Highlights:</i> Project includes 6 4-bedroom units. Community room onsite. Air conditioning will be provided in units.</p>	
<p>Pre-Development</p>	<p><b>Woodland Hearth</b> – Community Partners for Affordable Housing - 63 units – Tigard</p> <p><i>Population to be served:</i> Individuals and Families</p> <p><i>Leveraged Funding Sources:</i> 4% LIHTC, Metro Housing Bond, City of Tigard Urban Renewal funds.</p> <p><i>Service Partnerships:</i> Community Action, HAKI, Native American Rehabilitation Association.</p> <p><i>Development Team:</i> LMC Construction &amp; Carleton Hart Architecture</p> <p><i>Project Highlights:</i> High-percentage of family sized units, especially 3 &amp; 4 bedroom units. Community room onsite. Air conditioning will be provided in units.</p>	



	<p><b>Aloha 209<sup>th</sup> Development- the Housing Authority of Washington County- Approximately 68 units for families and individuals- Aloha (unincorporated Washington County).</b></p> <p>This will be the final Metro Housing Bond project in Washington County’s LIP jurisdiction. Metro’s Site Acquisition team acquired the property in January 2024 and is working with HAWC for them to develop the property. The HAWC Board of Directors approved the project’s predevelopment budget and partnership formation on February 6, 2024.</p>	
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## SECTION 4: PERMANENT SUPPORTIVE HOUSING

*This section confirms PSH unit commitments in your jurisdiction. PSH is defined as: units using coordinated access systems serving Population A (Extremely low-income individuals who have one or more disabling conditions; and are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness). Please confirm the information in Figure 2.*

**Figure 2. Permanent Supportive Housing Commitments**

Project	Total Units	PSH Units	Target Population	Service Partners	Plans to leverage (SHS) Supportive Housing Services funding (Yes/No/TBD)	
					For rental Assistance	For Wraparound Services
Valfre at Avenida 26	36	8	Individuals, families, Latinx families and individuals.	Sequoia Mental Health, Bienestar	No	No
Viewfinder	81	30	Veterans (10 VASH Units), individuals, families	Project Homeless Connect, Cornerstone Partners	Yes	Yes
Heartwood Commons	54	54	Individuals	CPAH, Sequoia Mental Health	Yes	Yes
Terrace Glen	144	3	Youth	HOME Plate, IRCO	No	No
Alongside	58	24	Veterans (VASH), Seniors	VA	No	No
Opal	54	*	Seniors	Friendly House	TBD	TBD

Plaza Los Amigos	113	16	Latinx Families and Individuals, individuals and families	Sequoia Mental Health, Bienestar	TBD	TBD
Plambeck Gardens	116	16	Families, Individuals	Centro, Virginia Garcia, NAYA	TBD	TBD
Woodland Hearth	63	22	Families, Individuals	HAKI, NAYA	TBD	TBD

\*Opal Apartments had planned to utilize RLRA and PBV to provide 24 PSH units, however the project team is in conversations with the County’s homeless services team to ensure any PSH units are placing chronically homeless from the County’s from our homeless services system and also have funding for services attached to the unit, so at this time the County is not reporting the project as providing PSH units.

## SECTION 5: CONTRACTING AND WORKFORCE OUTCOMES UPDATE

*Local implementation strategies prioritize racial equity by setting contracting goals for COBID-certified firms and tracking workforce participation in the construction of Metro bond projects. Please review and confirm the information in Figures 3 and 4 and let us know of any changes.*

**Figure 3. Equitable contracting goals and outcomes**

Project name	Developer, General contractor	Actual/expected construction completion	Contracting goals		Contracting outcome	
			% of total contract amounts paid to...		% of total contract amounts paid to...	
			Project goal (% hard costs)	Project goal (% soft costs)	Project outcome (% hard costs)	Project outcome (% soft costs)
Cedar Rising	BRIDGE/ LMC	Dec-23	20%	20%		
Heartwood Commons	HAWC/ GSI	Mar-23	20%	20%	21.6%	76.3%
Plambeck Gardens	CPAH/ LMC	Aug-24	20%	20%		
Goldcrest	BRIDGE/ COLAS	June-24	20%	20%		
Plaza Los Amigos	REACH/ LMC	Apr-24	20%	20%		
Opal Apartments	Home First/ Beaudin	Jan-24	20%	20%		
Terrace Glen	Related NW/ Walsh	May-23	20%	20%	31.2%	NA
The Valfre at Avenida 26	DCM/ LMC	Oct-22	20%	NA	33.1%	NA
Alongside Senior Housing	NHA/ Walsh	Oct-23	20%	20%	22.9%	25%

Viewfinder	CDP/ Bremik	Dec-21	20%	20%	21.8%	26%
Woodland Hearth	CPAH	Oct-25	30%	20%		

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

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

Project name	Developer, General contractor	Actual/expected Construction completion	Workforce tracking?	Prevailing wage	Workforce goals % of total labor hours* worked by...			Workforce outcomes % of total labor hours* worked by...		
			Y/N	BOLI, Davis Bacon, N/A	POC	Women	Apprentices	POC	Women	Apprentices
Cedar Rising	BRIDGE/ LMC	Dec-23	N	N						
Heartwood Commons	HAWC/ GSI	Feb-23	N	BOLI						
Plambeck Gardens	CPAH/ LMC	Aug-24	N	N						
Goldcrest	BRIDGE/ COLAS	June-24	N	N						
Plaza Los Amigos	REACH/ LMC	Apr-24	Y	Davis Bacon						
Opal Apartments	Home First/ Beaudin	Jan-24	Y	Davis Bacon						
Terrace Glen	Related NW/ Walsh	June-23	N	N						
The Valfre at Avenida 26	DCM/ LMC	Oct-22	N							
Alongside Senior Housing	NHA/ Walsh	Oct-23	Y	Davis Bacon				45%	4%	12%
Viewfinder	CDP/ Bremik	Dec-21	Y	Davis Bacon				42%	3%	18%
Woodland Hearth	CPAH	Oct-25	Y	Davis-Bacon						

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

## SECTION 6: ADVANCING EQUITY IN CONSTRUCTION

**Please share progress on equitable contracting and workforce strategies in your jurisdiction. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:**

- a. Progress toward achieving equitable contracting goals

Washington County projects have met the equitable contracting goals established in the LIS and required for Metro Concept and Final Endorsement process. This success was a result of close collaboration with project teams, especially the project's general contractors. To give one example, Alongside was completed this fall and exceeded equitable contracting goals with 22.9% of project hard cost and 25% of project soft costs paid to COBID certified subcontractors. This was accomplished by the project sponsor, NHA, doing targeted bid requests to COBID certified firms, with personal follow up phone calls and emails to try and get as many engaged in the project bidding as possible. Vetting of contractor is completed to assess that they are knowledgeable of the scope of work, and that they can complete the project before contracting with them. In addition, Washington County as lead developer exceed COBID goals on hard costs for Heartwood Commons and substantially exceeded soft cost goals. This shows the commitment the County has to promoting workforce participation not only as a funder, but also a developer on affordable housing.

*b. Progress toward advancing workforce participation through workforce tracking*

Washington County negotiated with the final project to be funded through a NOFA, Woodland Hearth, to track workforce goals and outcomes in response to questions from Metro staff during the 2023 annual reporting process. The County did not set workforce tracking goals in its LIS, however in response to the desire to at least have some workforce outcomes, the County asked partners on projects that triggered Davis-Bacon to provide workforce tracking outcomes since the data on those projects is recoverable even after a project is completed.

*c. Plans to expand local capacity to monitor and report on contracting and workforce outcomes*

Washington County will require workforce tracking on the two remaining projects it's pipeline that have not closed- Woodland Hearth and Aloha 209<sup>th</sup> Metro Site Acquisition. In addition, the County has used the Metro Housing Bond workforce tracking model to emulate these systems for County-wide construction procurement. The County is implementing a system-wide workforce tracking process, and the Metro Housing Bond projects were a key test case to allow for lessons-learned and successes that encouraged County procurement to utilize these systems for all Public Works projects in the County.

## **SECTION 7: ADVANCING EQUITABLE HOUSING OPPORTUNITY, ACCESS, AND STABILITY**

*The Affordable Housing Bond Program is guided by principles that aim to help those left behind by the region's housing market. This includes communities of color, families with children, people with disabilities, seniors, veterans, and those at risk of homelessness or displacement. Each local implementation strategy outlines commitments to affirmative marketing, low-barrier lease-up, culturally responsive resident services and housing stability to those who have experienced displacement or are at risk of displacement.*

***Please share updates on the following, along with any best practices, lessons learned, or opportunities for improvement:***

- a. *How project locations support strategies described in your LIS, along with any location priorities for future solicitations (feel free to include a map if you can).*

Proximity to transit, parks, schools, and basic needs shopping was part of the competitive scoring criteria Washington County utilized in its Notice of Funding Availability (NOFA) evaluation process in 2020. Overall geographic dispersal of projects throughout Washington County's bond implementation area was also considered broadly throughout the evaluation process.

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

Meeting with community-based organizations serving communities of color to understand lessons learned from previous lease-up processes.

- Reviewing screening criteria of property management companies for several projects to determine how low-barrier screening is embedded in existing screening criteria.
- Working with the property management company to ensure appropriate translation materials and services are available.
- Developing a property flyer that is accessible to individuals with limited English language skills and can easily be translated.
- Developing a training for community-based organizations to describe the lease-up process in plain language.
- Coordinate with community-based organizations serving communities of color to hold information sessions with individuals interested in housing at the property.
- Follow-up regularly with property management team on timelines and status of project.
- Coordinate with staff working on any project based rental assistance and related programs, including Permanent Supportive Housing.
- Debrief with community-based organizations serving communities of color after the lease-up process to understand what went well and what to improve for the next lease-up process.
- Encourage developers to provide materials and translation services in all of Washington County's identified safe harbor languages.

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

Washington County's Supportive Housing Services team has built upon the existing homeless services infrastructure to restructure the previous coordinated referral system, Community Connect, to connect homeless individuals more efficiently to housing options with a trauma-informed approach. Service providers will be trained to provide a 20-minute Phase 1 assessment that quickly connects people to case workers shelter and care without having to wait for a lengthy phone-based assessment. The phased assessment helps participants building relationships with case workers, who support them through their housing navigation and



connection to additional services. The final phase of the assessment, after a housing placement, helps participants consider goals, needs, and resources to support their health and ongoing housing stability.

*d. Partnerships that align culturally specific/responsive services that meet the needs of residents (Figure 5).*

Washington County has worked with project sponsors on each Metro Bond funded project to ensure culturally specific services meet the needs of residents. For each project:

Valfre at Avenida 26: Bienestar providing culturally specific programming and services for a project targeting Latinx community for 36 units in Forest Grove

Terrace Glen: HomePlate providing services to homeless young adults aged 18-24 for 3 PSH units; EngAGE, in addition to traditional services such as economic stability and promoting health lifestyles, will offer an enriched arts program for residents. As the residents settle in, EngAGE will reach out to residents through surveys to develop additional culturally responsive programs.

Plaza Los Amigos: Bienestar, through their Promotores program, will provide culturally specific programming for the Latinx community. Sequoia Mental Health will provide supportive services to the formerly homeless residents in the PSH units.

Plambeck Gardens: This property is general affordable housing with a focus on very low and extremely low income individuals and families (30%, 40%, 50%, and 60% income bands) and individuals transitioning out of homelessness into Permanent Supportive Housing. Community Partners for Affordable Housing is partnering with:

- Centro Cultural for employment related services as well as connections to WorkSystems Inc.
- Virginia Garcia for health and wellness activities
- Native American Rehabilitation Association (NARA) for health and wellness activities for American Indians and Alaska Natives
- Neighborhood Health Center (NHC), based out of Tigard High School, for youth health services
- Naturopathic University of Oregon - Permanent Supportive Housing services
- Native American Rehabilitation Association (NARA) - Permanent Supportive Housing services
- Community Action - Permanent Supportive Housing services

Opal Apartments: This 54-unit property is targeting seniors and the LGBTQ community, with 52% of units targeting 30% AMI individuals and 24 units of PSH. HomeFirst is partnering for resident services with Friendly House/SAGE for case management and outreach services to LGBT seniors and Bienestar for their Latinx residents.

Woodland Hearth: This property is 63 units of affordable housing with a focus on very low and extremely low income individuals and families (30% and 60% AMI) with 22 units for individuals transitioning out of homelessness into Permanent Supportive Housing. Community Partners for Affordable Housing (CPAH) is providing services with:

- CPAH - comprehensive resident services with an onsite resident services coordinator
- Native American Rehabilitation Association (NARA) for mental health and recover services for American Indians and Alaska Natives
- Humanity Assistance Kindness Intercultural Community Services (HAKI) serves east African immigrant and refugee communities
- Community Action - Permanent Supportive Housing services

Alongside: 62 units of senior housing with services provided by Northwest Housing Alternatives (NHA), project developer/owner who has experience with 861 other units of senior housing. They are partnering with the Tigard Senior Center for resident activities. NHA will provide classes for things such as financial education workshops, visits from nursing students, and LIHEAP utility assistant sign ups. Meals on Wheels is a partner for meal service as well delivery of food boxes by NHA's residence services coordinator. Three units of PSH will receive services from Pathways for severe and persistent mental illness (SPMI).

Cedar Rising: 82 units of family housing with 33 units serving extremely low income households at 30% AMI, targeting the Latinx community and communities of color via partnership with Hacienda CDC. BRIDGE is partnering with Hacienda CDC to provide resident and culturally responsive services for housing stability, economic opportunity, and youth and family services such as after-school programming and early childhood education.

Altura: 74 units of which 14 are for very low income households at 30% AMI. The 1,2 and 3 bedroom units are in a high opportunity area of Beaverton in South Cooper Mountain. Hacienda CDC is the resident services provider and will provide services programming such as connection to healthcare services, assistance with household items such as food and clothing, housing stabilization resources, youth and family services, and economic opportunity classes.

*e. Physical accessibility features (Figure 6)*

For example, for the Valfre at Avenida 26 project, in addition to providing two units designed to both Chapter 10 of ANS/ICC A117.1 and UFAS standards (called Type A units) and two units designed to Chapter 10 of ANS/ICC A117.1 (called Type B units), one of each Type A and Type B unit is also designed with sight/hearing accommodations. The entire site also has ADA accessible sidewalks with the exception of three units on the west side that required staired entries; doors throughout the site have levered handles.

**Figure 5. Summary of project plans and partnerships for affirmative marketing and culturally responsive services**

Project name	Who the project seeks to serve	Plans/partnerships for affirmative marketing	Plans/partnerships for culturally responsive services
See list above			

**Figure 6. Physical accessibility features**

Project name	Number of ground floor units	Number of ADA (Type A) units	Universal design (Y/N)
Heartwood Commons	16	5	N
Cedar Rising	15	4	Y
Alongside	10	5	Y
Opal Apartments	0	3	Y
Plaza Los Amigos	6	6	Y
Altura	15	4	Y

The Opal Apartments is a recent success with the planned delivery of multiple ADA adaptable features. All project units are ADA adaptable and designed to be modified at any time to meet the mobility needs of the resident. Given that our project aims to serve seniors, universal design elements are a critical aspect of ensuring that residents have the ability to age in place in units that are designed to meet their unique needs. Examples of these design components include but are not limited to:

- The inclusion of three fully ADA accessible units and all units as ADA adaptable
- Elevator
- ADA accessible entrances and community spaces
- Handrails and grab bars in-unit bathrooms
- Walk-in showers or tubs
- Non-slip flooring
- Rounded edge countertops
- Accessible cabinet pulls
- Levered style door handles
- Handheld showerheads

- Hard exterior surfaces for ease of navigation
- Front-mounted cooktop controls
- Shallow sinks
- Front-load washer/dryer
- Large print elevator controls
- Bathrooms that accommodate wheelchairs with appropriate turning radius

Project or engagement event	Total participants	Were demographics tracked? (Y/N)	If yes, how many voluntarily reported demographics?	Of those reporting demographics...						
				% people of color	% people with low incomes	% older adults (over 60)	% limited English proficiency	% immigrants and refugees	% existing tenants in building	% people who have experience homelessness
NARA Focus Group	9	Yes	8	100%	100%	N/a	N/a	0%	N/a	Some participants
Community Action Focus Group	11	Yes	11	45.5%	100%	N/a	N/a	0%	N/a	Some participants

Community Partners for Affordable Housing (CPAH) partnered with Native American Rehabilitation Association of the Northwest (NARA) and Community Action of Washington County to host two separate focus groups related to Woodland Hearth focusing on services and community amenity spaces for the property. Participants of these focus groups were individuals and families who have had lived experience with homelessness or housing instability but are currently stably housed.

Through this engagement, the biggest themes we heard was the desire for service programming within this new affordable housing development that is responsive to residents’ needs, the desire for community building events for all residents of the building, and the desire to feel safe within the community.

Focus group participants largely seemed to think that the planned community spaces would accommodate the types of programming that they would like to see. Folks did mention a desire for greater green spaces and gardens. CPAH explored the possibility of adding additional garden space and green spaces, but they proved to be infeasible due to site constraints. In the coming months, we will finalize our access control and security camera plan and we will include feedback from these focus groups into those plans. Participants were excited by the amount of parking that is being provided at this property, which is not required by the City of Tigard’s code. Participants expressed the need for off-street parking since

transit in the region is not always reliable or travels to the places they need to get to. Additionally, they expressed that using transit to grocery shop and complete errands for a larger family is especially challenging.

In response to the feedback related to services, CPAH will work closely with both NARA and Community Action, in particular to focus on programs that focus group participants highlighted including Rent Well classes, trauma-informed training with property management, classes related to helping folks transition from living outside to living in an apartment and the upkeep required, safety meetings, and Wellbriety.

## SECTION 8: INITIAL APPLICATION AND LEASING OUTCOMES

*For projects that are currently leasing or have completed the initial leasing process, please share any progress, lessons learned or best practices related to application and leasing strategies.*

**Figure 8. ENGAGEMENT ACTIVITIES, THEMES AND OUTCOMES (add rows as needed)**

<b>WHAT YOU DID</b> Include engagement done by developers/CBOs on all your projects in 2022. List community engagement activities such as “focus group,” “3 listening sessions,” “survey,” etc.	<b>WHAT YOU HEARD</b> Summarize major themes of feedback from each engagement activity, e.g. “more large units,” “more garden space,” “preferred cool exterior colors,” etc.	<b>WHAT YOU CHANGED</b> Summarize what changes were made to project in response to each theme of feedback, e.g. “added 5 more three- and four-bedroom units,” “increased garden space,” etc.

- Make sure public information on office hours and location is complete and up-to-date. Specifically, some referrals were not aware that project’s leasing offices were typically open on weekends.
- Work with referral organizations to make sure they understand LIHTC related tenant requirements and help educate them if not. Repeat this step as needed when new staff from outreach organizations get involved.
- Support leasing staff in creating processes to ensure prospects are quickly contacted regardless of referral source (e.g., email, phone, text, walk-in, website).
- The level of interest from some referral sources is hyper location specific. By conducting outreach to a wide group of organizations, project teams have been able to successfully reach a diverse tenant population despite lower interest from certain groups.



**Terrace Glen**

<b>Race/Ethnicity</b>	<b>Number of Residents</b>	<b>Percent</b>
Hispanic	33	23%
White, Non-Hispanic	63	43%
Black or African American	18	12%
American Indian or Alaska Native	8	6%
Asian	17	12%
Native Hawaiian or Other Pacific Islander	6	4%
<b>Total</b>		<b>100%</b>

Referral sources included: IRCO, HomePlate, HAWC, Family Promise of Tualatin Valley, SAACO, Refugee Care Collective, Transition Projects, Resident Referrals, Portland Public Schools, Impact Northwest, Family Resource Navigator, Community Vision, and Catholic Charities.

# Housing Bond Progress Report for City of Beaverton | 2023

*This progress report summarizes how local jurisdictions are carrying out their Affordable Housing Bond strategies. Each year, jurisdictions share progress reports with Metro, which are then reviewed by the Affordable Housing Bond Community Oversight Committee. Metro staff then create a yearly report summarizing progress across all implementing areas.*

## SECTION 1: UNIT PRODUCTION AND FUNDING

*This section provides a high-level overview of the Affordable Housing Bond projects and units in your jurisdiction, along with plans to leverage SHS funding for rental assistance and/or services. Please review and confirm the information in Figure 1 and let us know of any changes.*

Not much has changed from last year's report, Beaverton's 4 projects are on their way and at different stages.

**The Mary Ann** opened its doors in October 2021. Its 54 units are home to 117 people, including 46 children under 18. Eleven of the units are restricted to households at or below 30% area median income (AMI).

The reported race and ethnicity of The Mary Ann residents are as follows:

- Head of Household – Black/African American: 4
- Head of Household – American Indian/Alaska Native: 1
- Head of Household – Asian: 4
- Head of Household – Native Hawaiian/Other Pacific Islander: 1
- Head of Household – Latino/Hispanic: 9

**Amity Orchards (Scholls Ferry Road Development)** began construction of its 164 units in July 2022. Shortly after the start of construction and due to higher interest rates, updated subcontractor bids, infrastructure investment requirements, the project experience a \$10 million funding deficit. This funding gap was covered with OHCS and developer funding. Currently the project is expected to do a rolling leasing process as each of the three buildings complete construction. The first building is scheduled to be completed by mid-December 2024, the second building by mid-February 2025, and the final building by mid-May 2025. Of the 164 units, 17 will be restricted at 30% AMI or below without additional subsidy. The developer looked into making some of the 30% units as PSH; however, they don't have the resources/staff needed to manage such units.

We expect to break ground in fall 2024 with the construction of 81 units, 33 of which will be restricted at 30% AMI or below. In addition to the City's \$8.5 million Metro Bond allocation, the city is committing eight (8) Project Based Vouchers to this project. REACH CDC has been in conversations with Washinton County's Supportive Housing Service department to connect resources with households exiting homelessness.

The fourth and final project being funded with Metro Bond resources is the city’s **Senior Housing on 5th** project. On May 5, 2023, Community Partners for Affordable Housing (CPAH) was selected as the developer for the Senior Housing on 5th project. The proposal includes 104 units, 68 of which will be restricted at 30% AMI or below, and 30 of which will be designated as PSH units. The ground floor will include a Head Start and another commercial space with a to-be-determined use. The project is expected to break ground in summer 2025. The site is located in a very dynamic and strategic area of the city, which is currently being used as a temporary year-round shelter. The shelter will be relocating to a new location later this year.

**Figure 1. Production progress and resources committed**

Project	Total Project Cost	Metro Bond Funds (excludes SAP funding)	Number of BOND ELIGIBLE units <i>(excludes manager units and non-eligible units)</i>					Status  <i>Pre-construction, construction, complete</i>	Construction start <i>(anticipated or actual)</i>	Completion  Month/Year
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units	Number of occupants (as of Dec-2023)		Month/Year	
Elmonica Station	\$44,542,602	\$8,439,934	80	33	32	0	0	Pre-construction	Sep-24	Apr-26
Mary Ann	\$21,867,324	\$3,000,000	54	11	29	0		Complete	Jun-20	Sep-21
Amity Orchards	\$88,554,642	\$9,000,000	135	17	79	0	0	Construction	Jul-22	May-25
Senior Housing on 5th	\$50,530,613	\$10,500,000	104	68	0	30	0	Pre-construction	Aug-25	Dec-26
<b>Total committed or underway</b>		<b>\$ 30,939,934</b>	<b>373</b>	<b>129</b>	<b>140</b>					
<b>LIS commitment</b>		<b>\$ 31,587,595</b>	<b>218</b>	<b>89</b>	<b>209</b>					
<b>% of commitment complete</b>		<b>98%</b>	<b>171%</b>	<b>145%</b>	<b>67%</b>					
<b>Remaining for LIS</b>		<b>\$ 647,661</b>	<b>Goal Exceeded</b>	<b>Goal Exceeded</b>	<b>69</b>					

**SECTION 2: LOCAL IMPLEMENTATION STRATEGIES UPDATE**

*Please share how the development plan in your LIS is going. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:*

- a. *Results of competitive selections, who was involved and how LIS criteria influenced the outcome.*
- b. *How projects are efficiently using Metro bond funds and other public funding.*
- c. *Summarize ongoing commitments for project-based rental assistance and supportive services as well as progress in achieving any PSH goals.*
- d. *Summarize impacts of increased construction costs and private activity bond constraints on Metro bond housing projects. Please describe how the jurisdiction is working with developers to ensure housing quality and mitigate risks when projects face cost escalations, unexpected challenges, or delays related to local regulations or the changing funding landscape.*
- e. *How Supportive Housing Services (SHS) funding is being integrated or leveraged to support outcomes for serving very low-income households and households experiencing or at risk of homelessness.*
- f. *Describe the approach and timelines for achieving remaining unit production targets, including any priorities for remaining unit production targets, such as homeownership or supportive housing.*

The City of Beaverton Local Implementation Strategy (LIS) included leveraging three publicly owned sites, The Mary Ann, Senior Housing on 5th, and Elmonica. These three sites are in areas near mass transit, schools, and other amenities. The Amity Orchards project is in an emerging area next to Mountainside 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, and
- Housing accessibility for seniors and non-abled body residents.

We expect to exceed the number of units being created, including family-sized and deeply affordable (30% AMI) units. Projects' designs include universal design and strategies to lower screening criteria requirements. For description of amenities near the Mary Ann, Amity Orchards, Elmonica, and Senior Housing on 5<sup>th</sup> please refer to project highlights in Section 3

### **SECTION 3: PROJECT HIGHLIGHTS**

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

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

- a. *Who the project intends to serve.*
- b. *Project team and partnerships*
- c. *Noteworthy features or highlights (e.g., community space, free wi-fi and project amenities)*

- d. How projects are incorporating sustainability, climate resilience and AC/cooling strategies to keep people safe*
- e. Anything else worth highlighting*
- f. Who the project intends to serve.*
- g. Project team and partnerships*
- h. Noteworthy features or highlights (e.g., community space, free wi-fi and project amenities)*
- i. How projects are incorporating sustainability, climate resilience and AC/cooling strategies to keep people safe*
- j. Anything else worth highlighting*

**The Mary Ann** Serves very low-income families with children with incomes at or below 60% of the (AMI) with 20% of the homes set aside for households at or below 30% AMI. Onsite programs and services to residents are provided through a partnership with Bienestar. As part of their work, Bienestar provides culturally specific, bilingual services to the Latinx and low-income community of Washington County. The building is owned and managed by REACH. The Mary Ann was designed by Scott Edwards Architecture with construction by Walsh Construction and construction management by The Klash Group. This \$22.6 million project is financed with funding from the City of Beaverton's allocation of the Metro affordable housing bond, Oregon Housing and Community Services, Business Oregon, Washington County, City of Beaverton grant funds, the Beaverton Urban Redevelopment Agency, and Energy Trust of Oregon. Permanent financing was provided by the Network for Oregon Affordable Housing (NOAH). Wells Fargo Bank made a nearly \$12 million Low Income Housing Tax Credit (LIHTC) equity investment in the project and is also the construction lender. The Community Housing Fund provided acquisition financing. In addition to the new homes, The Mary Ann features 39 parking spaces, bike racks in the garage and wall hung bike racks in the apartments, laundry facilities, and a community room that opens to a large courtyard. Residents also benefit from proximity to transit options like the MAX light rail and WES community rail, multiple shopping opportunities, grocery stores, Beaverton City Library, post office, restaurants, services, parks, and across the street from Beaverton High School. The Mary Ann was completed and opened to the public in fall of 2021.





**Amity Orchards:** After being the selected developer on May 12, 2020, Wishcamper Development Partners (WDP) acquired the adjacent property, also known as “Black Bird Farms”, with the intent of expanding the development from 164 units to 309, without additional Metro bond funds. However, due to cost escalations and limited Private Activity Bond, the project was divided into two phases. Phase one consists of 164-units which will serve 300+ people across three buildings with one 80-unit building restricted for senior housing. Additional changes from the original Concept Endorsement include:

- Originally, the project included 12 units restricted at 30% AMI or below. However, the final agreement increases the 30% units to 17.
- The remaining units (152) were restricted at 60% AMI or below in the original proposal. The final agreement includes 96 units restricted at 60% AMI or below and 51 units restricted at 70% AMI or below.

In addition to the \$9 million Metro Bond funds allocated to this project, the city invested \$849,191 of American Rescue Plan Act (ARPA) received from the federal government. Oregon Housing and Community Services also invested \$9 million to offset market costs and \$3 million as gap funding loan.

Shortly after the start of construction and due to higher interest rates, updated subcontractor bids, infrastructure investment requirements, the project experience a \$10 million funding deficit. This funding gap was covered with OHCS and developer funding. Currently the project is expected to do a rolling leasing process as each of the three buildings complete construction. The first building is scheduled to be completed by mid-December 2024, the second building by mid-February 2025, and the final building by mid-May 2025. Of the 164 units, 17 will be restricted at 30% AMI or below without additional subsidy. The developer looked into making some of the 30% units as PSH; however, they don't have the resources/staff needed to manage such units.



**Elmonica:** On June 1, 2021, City of Beaverton Council approved the selection of REACH CDC as the developer for the Elmonica project and requested Metro provide concept approval of the project. Metro provided such approval on December 16, 2021. The selected proposal is an 81-unit mix of studio, one-bedroom, two-bedroom, and three-bedroom units. The design is done in a way to promote multi-generational living with the studio units next to the three-bedroom units. The nearby amenities for Elmonica include:

- Public schools serving the site include Beaver Acres Elementary School, 5 Oaks Middle School, and Aloha High School.
- Parks such as the Waterhouse Powerline Park, Parr Park, Tualatin Hills Park, Vendla Park, and Tualatin Hills Nature Park with the immediate vicinity.
- The site is centrally located with multiple and diverse grocery stores within less than 2 miles.
- Major employers in the general surrounding area include Nike, Intel, Tektronix, Cascade Microtech, Columbia Sportswear, Providence St. Vincent Hospital, and other high-tech companies. The site is located less than 1,000ft from the Elmonica light rail station. The nearby bus routes include the #67 on 158th, #59 on Walker, and #52 on 185th.

Colas Construction (COLAS), the largest Black-owned construction firm in the Northwest, is the general contractor selected for this project. COLAS is an industry leader in affordable housing, M/WBE percentages and consistently delivers on-time and on budget for large-scale projects. COLAS and REACH have also partnered with LatinoBuilt, National Association of Minority Contractors, Oregon Association of Minority Entrepreneurs, Oregon Tradeswomen, Portland Opportunities Industrialization Center (POIC), and many others to achieve tangible minority/women-owned contractor results. Bienestar will support outreach, marketing, lease-up, and deliver programming to the project. The building will utilize trauma-informed and universal design standards including accessible Type A units, hearing impaired units, multi-lingual signage, and maximize natural light in common spaces. Multiple challenges have risen as the project goes through the land use/permitting process. Issues such as:

- The site's location requires permit approval from the city of Beaverton and Washington county.
- The property is located at the corner of SW Baseline and 170<sup>th</sup>, due to its dimensions access to the property is challenging.
- REACH purchased the undeveloped adjacent property, which in turn sold to a private developer. The idea was leverage both sites for the benefit of access to the property.
- PGE electric poles being installed in the right of way without proper notification have required the project to be redesigned
- Multiple project redesigns were needed to accommodate the partnership with the private developer and county/city permitting/zoning requirements.
- These delays have led to a funding gap to which the city and county plan to increase its funding. Funding will also be needed from the state to completely fill the funding gap.

As previously mentioned, we expect the project to break ground this fall 2024.



**Senior Housing on 5th:** the Beaverton community center, the proposed site for senior affordable housing on 5th, is 1.37 acres in size and is located at the southeast corner of SW Hall Boulevard and SW 5th street, across the street from Beaverton city



park. it is a block south of the Beaverton city library and approximately four blocks north of the Elsie Stuhr Community Center. the Beaverton farmer’s market is two blocks north and old town commercial businesses are blocks away.

The site is directly served with high-frequency bus service including bus route 76 with a stop immediately adjacent on SW 5th street. The site is within a half-mile walk of two non-high frequency bus routes, 88 and 78. All these bus routes go to the Beaverton Transit Center, less than a mile away, where riders may transfer to MAX and WES light rail lines. The site is zoned regional center-old town (RC-BC) which is intended to provide a mix of housing, jobs, and services at a scale that acknowledges and complements historic development patterns.

As previously mentioned, on May 5, 2023, Community Partners for Affordable Housing (CPAH) was selected as the developer for the Senior Housing on 5th project. The proposal includes 104 units, 68 of which will be restricted at 30% AMI or below, and 30 of which will be designated as PSH units geared for chronically homeless seniors. CPAH’s partnerships for outreach, leasing assistance, resident services, and wrap-around services include Bienestar, Native American Rehabilitation Association Northwest (NARA NW), and the Urban League.

Unit size (no. of bedrooms)	No. of units	AMI %	PSH	PBV	Square feet/unit	Gross monthly rent/unit
1-bedroom	36	60%				\$1,198
1-bedroom	60	30%	22	19		599
Studio	8	30%	8			559
Total	104		30	19		

The ground floor commercial space is very important in this project. To ensure the proposed uses met community needs, CPAH conducted outreach to its residents and the community to understand needed uses in the area. Residents were excited by the idea of active ground floor spaces. Over half of those polled asked for an affordable grocery store. CPAH also engaged with service providers to discuss needs in the community-at-large and those specific to central Beaverton. Partner organizations were interested in the possibilities of a health clinic and early childhood education center being located on the property. As part of their due diligence, CPHA reached out to grocery chains (Green Zebra and Basic Markets) to test interest. CPHA also initiated discussions with NARA NW, Virginia Garcia, and the Elsie Stuhr Senior Center, all of whom expressed interest in having a presence.

Since their initial outreach, CPHA reconnected with the grocery chains for further discussions; unfortunately, there was no interest in moving forward with either company. Nonetheless, conversations with Community Action for a potential Head Start program seem to be fruitful. Additional work and due diligence are being done to identify the other commercial partner.



#### SECTION 4: PERMANENT SUPPORTIVE HOUSING

*This section confirms PSH unit commitments in your jurisdiction. PSH is defined as: units using coordinated access systems serving Population A (Extremely low-income individuals who have one or more disabling conditions; and are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness). Please confirm the information in Figure 2.*

**Figure 2. Permanent Supportive Housing Commitments**

Project	Total Units	PSH Units	Target Population	Service Partners	Plans to leverage (SHS) Supportive Housing Services funding (Yes/No/TBD)	
					For rental Assistance	For Wraparound Services

SENIOR HOUSING ON 5TH	104	30	SENIORS 55+	NARA, BIENSTAR	TBD	TBD

## SECTION 5: CONTRACTING AND WORKFORCE OUTCOMES UPDATE

Local implementation strategies prioritize racial equity by setting contracting goals for COBID-certified firms and tracking workforce participation in the construction of Metro bond projects. Please review and confirm the information in Figures 3 and 4 and let us know of any changes.

**Figure 3. Equitable contracting goals and outcomes**

Project name	Developer, General contractor	Actual/expected construction completion	Contracting goals		Contracting outcome	
			% of total contract amounts paid to...		% of total contract amounts paid to...	
			Project goal (% hard costs)	Project goal (% soft costs)	Project outcome (% hard costs)	Project outcome (% soft costs)
Elmonica Station	REACH CDC/COLAS	Apr-26	25%	25%	TBD	TBD
Mary Ann	REACH/Walsh	Sep-21	20%	20%	27.5%	22.6%
Amity Orchards	Wishcamper/COLAS	May-25	20%	20%	TBD	TBD
Senior Housing on 5th	CPAH/LMC-ALMAR	Dec-26	30%	30%	TBD	TBD

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

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

Project name	Developer, General contractor		Workforce tracking?	Prevailing wage	Workforce goals	Workforce outcomes
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		Actual/expected Construction completion	Y/N	BOLI, Davis Bacon, N/A	% of total labor hours* worked by...			% of total labor hours* worked by...		
					POC	Women	Apprentices	POC	Women	Apprentices
Elmonica Station	REACH CDC/COLAS	Apr-26	Y	Davis Bacon	N/A	N/A	N/A	TBD	TBD	TBD
Mary Ann	REACH/Walsh	Sep-21	Y	N/A	N/A	N/A	N/A	38%	2%	12%
Amity Orchards	Wishcamper/COLAS	May-25	Y	N/A	N/A	N/A	N/A	TBD	TBD	TBD
Senior Housing on 5th	CPAH/LMC-ALMAR	Dec-26	Y	Davis Bacon/BOLI	N/A	N/A	N/A	TBD	TBD	TBD

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

## SECTION 6: ADVANCING EQUITY IN CONSTRUCTION

***Please share progress on equitable contracting and workforce strategies in your jurisdiction. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:***

- a. Progress toward achieving equitable contracting goals*
- b. Progress toward advancing workforce participation through workforce tracking*
- c. Plans to expand local capacity to monitor and report on contracting and workforce outcomes*

The city strives to have a workforce which represents the racial and ethnic makeup of the community it serves and as stewards of the Metro Affordable Housing Bond, we continue to further this work through ongoing outreach efforts with community partners and the MWESBDV/COBID community. The city is a member of LatinoBuilt, Professional Development Business Group (PDBG), and OAME. As a member we attend membership meetings and maintain frequent communication with leaders in these and other trade associations. These partnerships strengthen the city’s relationships with developers, general contractors, subcontractors, and suppliers. Additionally, these relationships assist the city in addressing identified challenges in the earlier project phase, such as outreach fatigue/trust issues with government entities, casual meet and greets that don’t result in meaningful connections, and a lack of knowledge about the city’s commitment to MWESB hiring. After each project award, the successful developer is asked to attend a trade association event with their general contractor to discuss their project schedule with perspective subcontractors.

While the city did not commit to a specific workforce or apprentice performance, we do want to track this data as it will inform capacity and areas of employment and contracting opportunities. To that end, the city tracks the demographics and hours worked by each apprentice and

combines that with labor hours to express the percentage of apprenticeship hours on each project. Reports produced from the Mary Ann show that 11.88% of hours spent on the project were apprentice hours. We will be tracking this information on all housing projects.

The City of Beaverton funded LatinoBuilt Foundation for a second year through the PY22 Community Development Block Grant (CDBG) to expand a project called the “LatinoBuilt Microenterprise Support Program,” which offers holistic professional services to small Latinx -owned construction businesses in Beaverton who have suffered due to the COVID-19 pandemic. Their goal for this year is to onboard and facilitate this programming for twenty-five (25) Latinx-owned microenterprise construction businesses in Beaverton. The city also funded PDBG through the CDBG for a first year to serve nine (9) beneficiaries "Building pathway to success for underserved Construction entrepreneurs".

Last, the city continues to develop and implement a web-based software COBID tracking system. This MWESB database stores progress at all phases of construction to facilitate ongoing communication between the city, developer, and general contractor. The information captured on each project includes the estimate and actual costs of professional services, suppliers, and subcontractors, in addition to labor and apprenticeship hours spent on each site. The labor and apprenticeship hours include race and ethnicity, gender, and the specific trade of each employee. These reports provide insight into where the project stands in real time with MWESB percentages and promotes our ability to successfully implement equitable contracting goals and strategies in listed in our LIS.

## **SECTION 7: ADVANCING EQUITABLE HOUSING OPPORTUNITY, ACCESS, AND STABILITY**

*The Affordable Housing Bond Program is guided by principles that aim to help those left behind by the region’s housing market. This includes communities of color, families with children, people with disabilities, seniors, veterans, and those at risk of homelessness or displacement. Each local implementation strategy outlines commitments to affirmative marketing, low-barrier lease-up, culturally responsive resident services and housing stability to those who have experienced displacement or are at risk of displacement.*

***Please share updates on the following, along with any best practices, lessons learned, or opportunities for improvement:***

- a. How project locations support strategies described in your LIS, along with any location priorities for future solicitations (feel free to include a map if you can).*
- b. How projects are incorporating affirmative marketing strategies, partnerships for referral, and low-barrier lease-up.*
- c. Specific strategies for leasing permanent supportive housing units (e.g. coordinated referrals).*
- d. Partnerships that align culturally specific/responsive services that meet the needs of residents (Figure 5).*
- e. Physical accessibility features (Figure 6)*

For the Mary Ann, the screening criteria was modified to allow potential tenants previously prevented from benefiting from affordable housing units. In addition, Bienestar, who provides resident services for the Mary Ann, and provide culturally specific, bilingual services to the Latinx residents of the Mary Ann, can support and provide culturally responsive services to the Mary Ann community. REACH has

developed highly inclusive and effective leasing plans that recognize the community’s strong engagement and inherent expertise. The lease up process began in the fall of 2021 and city staff was actively engaged in the lease up process to ensure increased accessibility to new units. The list of partners includes but are not limited to the Neighborhood Associations Committees (NAC’s), culturally specific-led Rent Assistance Collaboration group, Beaverton library staff, the Housing Supportive Services Network, the Community Services program at the City of Beaverton, the Housing Technical Advisory Group, and the Beaverton Inclusive Housing cohort were engaged in outreach efforts. Marketing and communication efforts include the delivery of press releases, City of Beaverton website marking, and media day exposure.

The Amity Orchards project will provide equitable access, low barrier to entry screening, a consistently applied policy to override the screening criteria, and linguistically and culturally appropriate materials and services that reflect community demographics.

WDP has partnered with Unite Oregon for their grassroots community outreach model to ensure that the housing opportunity reaches the Priority Populations, Latinx and Asian, and communities of unequal opportunity, taking into consideration communication, learning, and cultural barriers that often exist. Three primary methods will be utilized for outreach: direct contact, traditional marketing, and hosted events. Direct contact relies on finding ways to personally reach individuals and organizations. Hosted events and traditional marketing tactics are useful outreach tools in reaching larger groups, provided a minimum level of trust and awareness have been established within the local underserved community.

REACH’s outreach and marketing strategy for the building will be centered on culturally responsive and accessible information that offers low barrier tenancy. REACH is unique among Oregon’s affordable housing providers, as they self-manage their housing portfolio. The team will be developing preference policies for multi-generational housing options and for homeless youth and families to ensure greater accessibility to these targeted communities. Information sessions will serve to market the property, explain the application and leasing process, identify, and prevent barriers applicants may encounter, and preemptively provide solutions and/or strategies to navigate them. The team will activate a vibrant word-of-mouth campaign with immigrants, refugees, and communities of color to share awareness for this opportunity through the networks of REACH, Bienestar, Homeplate Youth Services, and those of its partners in the Racial Equity Collaborative of Washington County and the Somali Empowerment Circle. The team will work with neighborhood organizations to identify local businesses, congregations, culturally specific community centers, and service providers such as Community Vision, major employment and training centers, places of worship, libraries, Black, Indigenous and People of Color-owned businesses, the Andisheh Center, and the Muslim Education Trust

**Figure 5. Summary of project plans and partnerships for affirmative marketing and culturally responsive services**

Project name	Who the project seeks to serve	Plans/partnerships for affirmative marketing	Plans/partnerships for culturally responsive services
Elmonica Station	Families resembling Beaverton’s diversity	Bienestar	Bienestar

The Mary Ann	Families resembling Beaverton's diversity	Bienestar	Bienestar
Senior Housing on 5th	Seniors	Bienestar, NARA, Urban League	Bienestar, NARA, Urban League
Amity Orchards	Families and Seniors resembling Beaverton's diversity	TBD	TBD

**Figure 6. Physical accessibility features**

Project name	Number of ground floor units	Number of ADA (Type A) units	Universal design (Y/N)
Elmonica Station	None		Y
The Mary Ann	4		Y
Amity Orchards	None		Y
Senior Housing on 5th	12		Y

## SECTION 8: COMMUNITY ENGAGEMENT TO INFORM PROJECT OUTCOMES

*Jurisdictions prioritize racial equity by engaging people of color and historically marginalized communities in shaping project design and outcomes.*

*Please share a summary of community engagement efforts in 2023 (Figures 7 and 8). Please address:*

- a) WHO was engaged*
- b) WHAT activities were done*
- c) WHAT themes came from the engagement, and*
- d) WHAT changes were made in response to project design and/or resident services programming*

*If applicable, describe any partnerships used to support reaching community members.*

**Figure 7. WHO WAS ENGAGED: Summary of community engagement demographics (add rows as needed)**

Project or engagement event	Total participants	Were demographics tracked? (Y/N)	If yes, how many voluntarily	Of those reporting demographics...						
				% people of color	% people with low incomes	% older adults (over 60)	% limited English proficiency	% immigrant	% existing tenants in building	% people who have experience

			reported demographics?					s and refugees		homeless
Housing Technical Advisory Group	11	Y	All	45%	27%	9%	0%	9%	0%	9%
Beaverton Inclusive Housing Cohort	12	Y	All	100%	N/A	N/A	18%	N/A	0%	N/A
Senior Housing on 5 <sup>th</sup> – Open House	30	Y	85%	20%	N/A	45%	N/A	N/A	22%	N/A
Senior Housing on 5 <sup>th</sup> – Farmers Market	N/A	N	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Senior Housing on 5 <sup>th</sup> – Bienestar	40	Y	All	90%	N/A	40%	50%	50%	100%	N/A

**Figure 8. ENGAGEMENT ACTIVITIES, THEMES AND OUTCOMES (add rows as needed)**

WHAT YOU DID Include engagement done by developers/CBOs on all your projects in 2022. List community engagement activities such as “focus group,” “3 listening sessions,” “survey,” etc.	WHAT YOU HEARD Summarize major themes of feedback from each engagement activity, e.g. “more large units,” “more garden space,” “preferred cool exterior colors,” etc.	WHAT YOU CHANGED Summarize what changes were made to project in response to each theme of feedback, e.g. “added 5 more three- and four-bedroom units,” “increased garden space,” etc.
The Mary Ann (project completed)	N/A	N/A

<p>Elmonica 5 Focus Groups (Feb 2022)</p>	<ul style="list-style-type: none"> <li>• Preferred 1 BD vs studio</li> <li>• Participants like U-shaped and L-shaped kitchens.</li> <li>• More storage space, natural light, and built-in furniture</li> <li>• Prefer roll-in showers</li> <li>• More bottom storage and pull-out drawers in kitchen</li> <li>• Pocket door in bathroom</li> <li>• Shared bike room as preference</li> <li>• Separate bedroom with living space</li> </ul>	<ul style="list-style-type: none"> <li>• Bathroom layout was adjusted to avoid conflict between entrance and bathroom doors</li> <li>• In kitchen, for lower cabinets, pull out drawers are provided in type A units for accessibility and convenience of use. Pantry is provided in every type A unit.</li> <li>• For bathroom, roll in shower is provided in every type A unit.</li> </ul>
<p>Amity Orchards</p>	<p>N/A</p>	<p>N/A</p>
<p>Senior Housing on 5th</p>	<ul style="list-style-type: none"> <li>• Support for more sources for people to transition from homelessness to suitable housing</li> <li>• Exercise and socializing opportunities</li> <li>• Walking shower to minimize falls</li> <li>• Showers with seats</li> <li>• Like the idea of a Head Start on the ground floor, volunteer opportunities</li> <li>• Ability to notify someone if a tenant falls in their apartment</li> <li>• Would like to have a community space with shared kitchen</li> <li>• No carpet on common areas or apartments</li> <li>• A place for a caretaker to stay</li> </ul>	<p>TBD</p>

## SECTION 9: INITIAL APPLICATION AND LEASING OUTCOMES

*For projects that are currently leasing or have completed the initial leasing process, please share any progress, lessons learned or best practices related to application and leasing strategies.*

N/A



# Housing Bond Progress Report for City of Hillsboro | 2023

This progress report summarizes how local jurisdictions are carrying out their Affordable Housing Bond strategies. Each year, jurisdictions share progress reports with Metro, which are then reviewed by the Affordable Housing Bond Community Oversight Committee. Metro staff then create a yearly report summarizing progress across all implementing areas.

## SECTION 1: UNIT PRODUCTION AND FUNDING

This section provides a high-level overview of the Affordable Housing Bond projects and units in your jurisdiction, along with plans to leverage SHS funding for rental assistance and/or services. Please review and confirm the information in Figure 1 and let us know of any changes.

**Figure 1. Production progress and resources committed**

Project	Total Project Cost	Metro Bond Funds	Number of BOND ELIGIBLE units <i>(excludes manager units and non-eligible units)</i>					Status	Construction start <i>(anticipated or actual)</i>	Completion
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units	Number of occupants (as of Dec-2023)			
Nueva Esperanza	\$53,905,844	\$16,940,731	149	60	105			Complete	Mar-22	Nov-23
The Dolores	\$34,557,577	\$10,500,000	66	30	46	10		Pre-construction	Sep-24	Dec-25
<b>Total committed or underway</b>		<b>\$27,440,731</b>	<b>215</b>	<b>90</b>	<b>151</b>					
<b>LIS commitment</b>		<b>\$41,240,081</b>	<b>284</b>	<b>117</b>	<b>142</b>					
<b>% of commitment complete</b>		<b>67%</b>	<b>76%</b>	<b>77%</b>	<b>106%</b>					
<b>Remaining for LIS</b>		<b>\$13,799,350</b>	<b>69</b>	<b>27</b>	<b>Goal Exceeded</b>					

## SECTION 2: LOCAL IMPLEMENTATION STRATEGIES UPDATE

*Please share how the development plan in your LIS is going. Please highlight any best practices, lessons learned, or opportunities for improvement.*

At the end of calendar year 2023, the City of Hillsboro has one of three total projects completed. The Nueva Esperanza project by Bienestar and Housing Development Center was placed in service in late 2023 providing 149 new affordable homes, 52% of Hillsboro's total production target, while using approximately 41% of the allocated funding. Of the homes created, 105 have 2 or more bedrooms, representing 74% of Hillsboro's target for family-size homes. 60 units are affordable to households with incomes at or below 30% of area median income (AMI), achieving 51% of Hillsboro's target for deeply affordable homes.

In addition to contributing \$16.9 Million in Housing Bond funds, Hillsboro donated 6-acres of property for the Nueva Esperanza project. The project overcame cost escalations through a variety of means, including developer fee contributions and the City's early disbursement of "holdback funds" associated with the loan agreement for bond funds. The project also surmounted challenges due to electrical meter gear and transformer supply constraints and delays through interjurisdictional coordination and advocacy, equipment workarounds, and project phasing. The project is home to nine tenants using Long Term Rental Assistance ("RLA") Vouchers from Washington County, sourced by Supportive Housing Services (SHS) measure funds. An award-winning project, Nueva Esperanza is a wonderful and much needed addition to the Hillsboro community and provided an impactful start to the City's Housing Bond implementation.

Hillsboro's second project planned for Housing Bond funding, the Dolores, achieved Concept Endorsement in 2023. Developer Hacienda CDC was selected through a competitive solicitation described below. Dolores will be Hacienda's first affordable housing project in Washington County and includes a partnership with New Narrative to provide Permanent Supportive Housing (PSH).

Leading to this project, Metro purchased two adjacent properties in July 2022 on Walker Rd. in Hillsboro. The City partnered with Metro and issued a Request for Proposals (RFP) for disposition and development of the site with up to \$11 Million in bond funding. RFP requirements included a 40% minimum number of deeply affordable income levels and family-size units. Racial Equity, Resident Services and Community Engagement plans were required of each proposal, aligning with Hillsboro's Local Implementation Strategy (LIS) and the Metro Bond Framework. Sustainability Measures, Universal Design Features and Cooling/AC provisions in each unit were also required of proposed projects. Preferences within the RFP included dedicated PSH units and voluntary workforce tracking and reporting. A proposal selection committee was formed in partnership with Metro, comprised of racially and culturally diverse community members. The Dolores was the highest scoring project and City staff's recommendation.

Hacienda's Dolores project will provide 66 regulated affordable housing units, including 30 deeply affordable units, 46 family-size units and a minimum of 10 Permanent Supportive Housing units (PSH). Concept Endorsement reserved \$10.5 Million in bond funds, a total of \$159,000 per unit in bond subsidy. Hacienda is working actively with Washington County to include 10-12 RLA vouchers, sourced by SHS funds, in addition to

securing an operating reserve of SHS funds for the project. Despite Private Activity Bond (PAB) constraints at the state level, the Dolores was successful in being recommended for an OHCS award of 4% tax credits and PABs. Hacienda anticipates a Summer 2024 financial close and construction start for the project.

The Nueva Esperanza and Dolores projects collectively deliver over 75% of Hillsboro’s unit production target, 77% of the deeply affordable unit target, and comprise nearly 70% commitment of Hillsboro’s allocated bond funds. Hillsboro will exceed production of its family-size units target with these two projects.

Throughout 2023, the City also worked on a third affordable housing project considered for Housing Bond financing - Block 67 Affordable Housing in Downtown. The Viridian proposal, representing a mixed use, mixed income full-block buildout, contained an affordable housing project proposed by Related NW, in partnership with Centro Cultural, comprised of 78 units. Block 67 Affordable Housing would have completed and fulfilled Hillsboro’s production targets under the bond program. Unfortunately, current market conditions led the development team to indefinitely suspend development plans for the Block 67 site in late 2023. The market rate apartments and commercial projects were the most adversely affected and deemed infeasible at this time.

At the end of calendar year 2023, the City started planning for an alternative project to meet its remaining bond implementation target of 69 units and to utilize Hillsboro’s remaining allocated Housing Bond funds. The City and TriMet began discussing a property owned by TriMet as an opportunity for affordable housing. The City is also working with a real estate brokerage on possible acquisition of a site for the third bond-funded project. If a public site is secured, the City will issue an RFP for the property and funding, as it has with the other two bond-funded projects. If a public site is not acquired, the City will issue a Notice of Funding Availability (NOFA) as a competitive solicitation for the remaining Housing Bond funds.

### **SECTION 3: PROJECT HIGHLIGHTS**

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

#### Nueva Esperanza

Nueva Esperanza provides 149 new affordable homes and one unrestricted manager’s unit across 12 residential buildings and one central community building. Units serve households earning 30-60% of AMI. With 105 units of 2 bedrooms or more, the project focuses serving low and very-low-income families of color, particularly Latinx, Somali and other immigrant communities. The project features 46 three-bedroom units and 4 four-bedroom units for larger families.

With amenities such as boot washing stations to sliding separators for kitchen spaces, the Nueva Esperanza project team of Bienestar, Housing Development Center (HDC), Scott | Edwards Architecture, and LMC Construction designed Nueva Esperanza with cultural specificity and to be responsive to communities of color.



The Nueva Esperanza development team has focused on elements that enhance community building and support individual needs. The design elements that have been incorporated into the project, which enhance livability and accessibility, include:

- Community courtyards located within each cluster of residential buildings. Front doors open onto courtyards with areas to sit or to gather. Each courtyard provides a play area, a barbecue and picnic tables, walking paths, lighting and a distinct character.
- Type A (accessible) units located within various buildings across the site with ADA parking as close to the designated unit as possible.
- The project includes flats as well as townhouse units which allows for diversity in accessibility.
- Two-bedroom units include a bathroom with a lavatory separated from a toilet/bathtub.
- Three- and four-bedroom units include one bathroom with a bath and one bathroom with a shower.
- Blocking is provided in all bathrooms that will allow for future grab bars if the need arises.
- Kitchens include generous pantry units that enhance livability and reach space.

- Packaged Thermal Heat Pumps (PTHPs) in the living space of each unit for heating and cooling, and unit ports in bedroom windows.

Nueva Esperanza is located directly adjacent to the 53<sup>rd</sup> Ave Parks and Recreation Campus which includes soccer fields, basketball and tennis courts, an indoor state-of-the-art community center and an all-inclusive playground, amongst other amenities. Another noteworthy feature of the project is that the City of Hillsboro has provided municipal broadband service to residents, absorbing the costs of utility installation at the site. This allows residents of Nueva Esperanza to access high-speed internet from the City utility at a significantly reduced monthly cost.

### Dolores

The Dolores is a 3-story, elevator-served affordable housing project proposed on NE Walker Rd. in Hillsboro. Named after labor activist Dolores Huerta, it provides 66 affordable units that will serve households making between 30% AMI and 60% AMI. A total of 30 units will be provided at 30% of Area Median Income (AMI). The project features 46 family-size units of two-bedrooms or more, comprising nearly 70% of the project, and includes 26 three-bedroom units and 3 four-bedroom units. The project will house low and very low-income families, particularly Latinx and communities of color. The Dolores dedicates 10 units to Permanent Supportive Housing, which will receive case management services through New Narrative.



Hacienda CDC will be the project’s developer, owner, and resident services provider with Access Architecture, LMC Construction and Cascade Property Management completing the project team. Amenities at the Dolores include a community room, bike room, laundry rooms on each floor, exterior courtyard with covered seating, playground, community garden and property management and resident services offices.

Dolores will be designed to meet or exceed Earth Advantage Gold certification through specific strategies for the building envelope, energy, water, and indoor air quality. The team will use highly efficient systems, including LED lighting, occupancy sensor controls, in-unit energy recovery ventilation, mini-splits, and energy efficient appliances. Low flow water-saving fixtures are incorporated to save water and energy. To achieve additional energy savings, the project will include a highly efficient central hot water production system.

Dolores will house a robust roof-top solar array and 10% of the on-site parking spaces will be EV ready. The project will include 100% outside air heat recovery ventilation, use interior materials that do not contain added urea-formaldehyde, and finishes, adhesives, and other materials will have zero or low Volatile Organic Compounds. The Dolores will include mini-split HVAC systems in all units and community spaces. These systems were selected to provide programmable heating and cooling and air circulation without exposing residents to outside noise and pollutants.

## SECTION 4: PERMANENT SUPPORTIVE HOUSING

**Figure 2. Permanent Supportive Housing Commitments**

Project	Total Units	PSH Units	Target Population	Service Partners	Plans to leverage (SHS) Supportive Housing Services funding (Yes/No/TBD)	
					For rental Assistance	For Wraparound Services
<b>DOLORES</b>	67	10	<b>INDIVIDUALS AND FAMILIES EXITING HOMELESSNESS</b>	<b>NEW NARRATIVE</b>	YES	YES



## SECTION 5: CONTRACTING AND WORKFORCE OUTCOMES UPDATE

Local implementation strategies prioritize racial equity by setting contracting goals for COBID-certified firms and tracking workforce participation in the construction of Metro bond projects. Please review and confirm the information in Figures 3 and 4 and let us know of any changes.

**Figure 3. Equitable contracting goals and outcomes**

Project name	Developer, General contractor	Actual/expected construction completion	Contracting goals		Contracting outcome	
			% of total contract amounts paid to...		% of total contract amounts paid to...	
			Project goal (% hard costs)	Project goal (% soft costs)	Project outcome (% hard costs)	Project outcome (% soft costs)
Nueva Esperanza	Bienestar/HDC	Nov-23	29%	N/A	30.5%	N/A
Dolores	Hacienda CDC	Dec-25	20%	20%	TBD	TBD

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

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

Project name	Developer, General contractor	Actual/expected Construction completion	Workforce tracking? Y/N	Prevailing wage BOLI, Davis Bacon, N/A	Workforce goals			Workforce outcomes		
					% of total labor hours* worked by...			% of total labor hours* worked by...		
					POC	Women	Apprentices	POC	Women	Apprentices
Nueva Esperanza	Bienestar/HDC	Aug-24	N							
Dolores	Hacienda CDC	Dec-25	Y		25%					

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

## SECTION 6: ADVANCING EQUITY IN CONSTRUCTION

***Please share progress on equitable contracting and workforce strategies in your jurisdiction. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:***

- a. Progress toward achieving equitable contracting goals*
- b. Progress toward advancing workforce participation through workforce tracking*
- c. Plans to expand local capacity to monitor and report on contracting and workforce outcomes*

Hillsboro's LIS currently calls for a contracting goal for each bond-funded project such that 20% of *total* project costs are paid to MWESB-DV, COBID-certified businesses. Hillsboro's equitable contracting goal, based on total project costs, may increase construction contracting dollars to certified firms, depending on soft cost utilization.

Nueva Esperanza's total project cost is \$53.6 Million. Bienestar and HDC committed to working to achieve the 20% goal of these total costs based only on tracking hard costs. Therefore a 29% hard cost goal applied. At the end of 2023, Nueva Esperanza achieved 30.5% of hard cost payments to COBID-certified contractors, equaling \$12.1 Million paid to 11 certified businesses and exceeding the project's hard cost goal. This utilization constitutes 23% of total project costs and therefore also exceeds the 20% LIS goal. Due to both jurisdictional and developer capacity constraints, workforce tracking was not a requirement for the Nueva Esperanza project.

With the Dolores project, in addition to COBID-contracting, the Hacienda development team will also track both COBID-utilization and workforce participation including Persons of Color, Women and Apprentice hours. Several years ago, the City of Hillsboro hired a Supplier Diversity Administrator who is assisting on equitable contracting monitoring and supports, utilizing a software platform recently purchased by the City. The City envisions the possibility of enlisting the support of this position and/or a consultant team to help monitor and support workforce efforts moving forward.

## SECTION 7: ADVANCING EQUITABLE HOUSING OPPORTUNITY, ACCESS, AND STABILITY

*The Affordable Housing Bond Program is guided by principles that aim to help those left behind by the region's housing market. This includes communities of color, families with children, people with disabilities, seniors, veterans, and those at risk of homelessness or displacement. Each local implementation strategy outlines commitments to affirmative marketing, low-barrier lease-up, culturally responsive resident services and housing stability to those who have experienced displacement or are at risk of displacement.*

***Please share updates on the following, along with any best practices, lessons learned, or opportunities for improvement:***

- a. How project locations support strategies described in your LIS, along with any location priorities for future solicitations (feel free to include a map if you can).*

Hillsboro's LIS calls for new affordable housing development in opportunity-rich neighborhoods, with priority in areas currently not served by existing affordable housing projects and resources. Nueva Esperanza on NE 53<sup>rd</sup> Ave and Hidden Creek is an ideally located new affordable neighborhood, immediately proximate to the City's expanding local parks amenities. Adjacent to the site is the new Hidden Creek Community Center and the 53<sup>rd</sup> Avenue Community Park complex, including an all-access inclusive playground. High frequency light rail transit at the MAX Hawthorne Farm station is only ½ mile north of the site as is Bus #47 on Baseline Road to the south. A neighborhood commercial district, including a pharmacy and medical office are within walking distance. The closest existing affordable housing is in the Orenco Neighborhood, some 2 miles in distance. Thus, Nueva Esperanza is filling a need for affordable housing in the amenity-rich 53<sup>rd</sup> Avenue corridor.

The Dolores project is also located in a service-and amenity-rich area of Hillsboro. The Walker Rd. property acquired by Metro in Tanasbourne is proximate to Magnolia and Amberglen Parks, three grocery stores, the #48 bus line, and McKinley Elementary School.

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

For Nueva Esperanza, Bienestar, HDC, and partners carried out a multilingual marketing and lease-up plan ensuring that racial and economic equity is achieved, disadvantaged populations have equal and fair access, and that the project is furthering affordable housing choice in Hillsboro. Bienestar developed marketing materials that reach lower-income predominantly monolingual and limited-English Spanish-speaking households and lower-income African and other immigrant populations in Hillsboro. Bienestar worked with Somali Empowerment Circle, Adelante Mujeres, Family Promise, Community Action and others to ensure that information was distributed to communities of color.

Bienestar worked with local service agencies to create an improved low-barrier and equitable screening process for all applicants. These partners, (Community Action, Family Promise and Somali Empowerment Circle) and supportive housing experts (Sequoia Mental Health), identified common barriers such as negative credit history, past evictions, income inefficiency, and criminal records. Management did not deny an applicant for negative rental history or prior evictions if it was based on severe rent burden. Additionally, the criminal conviction review process removed any crimes that are no longer illegal at the State or Federal level. Bienestar and NW Real Estate (Property Manager) considered relevant individualized evidence of mitigating factors and approached each review through the lens of equity.

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

For Nueva Esperanza, Bienestar, HDC, and NW Real Estate accepted applicants with Washington County Long Term Rental Assistance (RLA) vouchers serving disabled community members that are struggling with chronic or at-risk homelessness, resulting in nine PSH households currently. Bienestar is coordinating with organizations such as Family Promise, Community Action, Sequoia Mental Health, Community Connect and other resources in Washington County for coordinated referrals as applicable.

Dolores' ten PSH units will also serve Population A in the Metro/Washington County Supportive Housing Services (SHS) program definition: extremely low-income (30% or below), have one or more disabling conditions, and who are experiencing or at imminent risk of experiencing long-term or frequent episodes of homelessness. The project intends to use Washington County's coordinated access system for resident referrals.

*d. Partnerships that align culturally specific/responsive services that meet the needs of residents (Figure 5).*

Bienestar's Promotores program recruits and empowers resident leaders (Promotores) who act as "community connectors," doing home visits and providing residents with referrals to relevant services. Resident services staffing is provided on-site at Nueva Esperanza through the Resident Services Coordinator, as well as a part-time Community Services Director, and three Promotores. Bienestar leverages a wide array of services for Nueva Esperanza 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 homeownership counseling and financial capabilities, student matched IDAs, homeownership IDAs, summer enrichment, community-building events, leadership, empowerment, and advocacy.

Resident Services planned at Dolores include workshops on tenant's rights and fair housing, emergency preparedness, living sustainably, a monthly newsletter, monthly tenant meetings with the property manager to provide important resources, a biennial Resident Services Evaluation that collects feedback from residents regarding resources needed, intake appointments with new residents to identify needs and HOP Bus Passes.

*e. Physical accessibility features (Figure 6)*

Nueva Esperanza's physical accessibility features are highlighted under Section 3 project descriptions and in Figure 6.

For the Hacienda Dolores project, physical accessibility design features currently include:

- Regular widening of corridors at unit entries and common area nodes for easier maneuvering.
- Generous clearances and turning space throughout the facility.
- Multi-purpose spaces with flexible seating for a wide variety of body types and abilities.
- All-gender restrooms that accommodate all, regardless of their gender-identity or expression.
- Two elevators to increase access and minimize wait times.
- Designing with a trauma-informed lens - which includes spaces with clear sight lines, multiple exits, and minimal barriers and using wood and nature-inspired colors at eye-level, which can be very grounding.
- Generous maneuvering clearances for all units, not just those designated as accessible.
- Integration of unit storage at all reach ranges, including full-height pantries wherever possible.

**Figure 5. Summary of project plans and partnerships for affirmative marketing and culturally responsive services**

Project name	Who the project seeks to serve	Plans/partnerships for affirmative marketing	Plans/partnerships for culturally responsive services
Nueva Esperanza	Low and Very Low-Income Families of color, particularly Latinx, Somali and other immigrant communities	Somali Empowerment Circle, Adelante Mujeres, Family Promise, Community Action, Centro Cultural and numerous others.	Bienestar’s Promotores program, Virginia Garcia, Community Action, Adelante Mujeres, and others.
Dolores	Low and Very Low-Income Families of color and Individuals and Families exiting homelessness	Adelante Mujeres, Bienestar, Centro Cultural, Hillsboro Public Library, Hillsboro School District, Jackson Bottom Wetlands, Washington County Solid Waste & Recycling, Latino Advisory Council	Hacienda Youth and Family Services and Resident Services. New Narrative PSH case management services.

**Figure 6. Physical accessibility features**

Project name	Number of ground floor units	Number of ADA (Type A) units	Universal design (Y/N)
Nueva Esperanza	52	8	Y
Dolores	17	4	Y

## SECTION 8: COMMUNITY ENGAGEMENT TO INFORM PROJECT OUTCOMES

*Jurisdictions prioritize racial equity by engaging people of color and historically marginalized communities in shaping project design and outcomes.*

*Please share a summary of community engagement efforts in 2023 (Figures 7 and 8). Please address:*

- a) WHO was engaged*
- b) WHAT activities were done*
- c) WHAT themes came from the engagement, and*
- d) WHAT changes were made in response to project design and/or resident services programming*

*If applicable, describe any partnerships used to support reaching community members.*

**Figure 7. WHO WAS ENGAGED: Summary of community engagement demographics (add rows as needed)**

Project or engagement event	Total participants	Were demographics tracked? (Y/N)	If yes, how many voluntarily reported demographics?	Of those reporting demographics...						
				% people of color	% people with low incomes	% older adults (over 60)	% limited English proficiency	% immigrants and refugees	% existing tenants in building	% people who have experience homelessness
Nueva Esperanza Engagement	31	Y	31	100	60	N/A	N/A	N/A	19	N/A
Dolores Engagement Resident Focus Groups	29	Y	28	78%	100%	32%	18%	40%	100%	7%
Dolores Engagement Community Roundtables	21	N								

**Figure 8. ENGAGEMENT ACTIVITIES, THEMES AND OUTCOMES (add rows as needed)**

WHAT YOU DID Include engagement done by developers/CBOs on all your projects in 2022. List community engagement activities such as “focus group,” “3 listening sessions,” “survey,” etc.	WHAT YOU HEARD Summarize major themes of feedback from each engagement activity, e.g. “more large units,” “more garden space,” “preferred cool exterior colors,” etc.	WHAT YOU CHANGED Summarize what changes were made to project in response to each theme of feedback, e.g. “added 5 more three- and four-bedroom units,” “increased garden space,” etc.
Bienestar conducted ongoing meetings with a Latinx Project Advisory Committee to inform everything from Nueva Esperanza project name to design and approach. Bienestar met regularly with resident focus groups and members of the Somali Empowerment Circle to include feedback on design and other project elements. Bienestar in partnership with Adelante Mujeres conducted an online survey	Having both shower and baths in a unit is favored, kitchen and living rooms should be separated- with a barndoor-style partition preferred, dining room should be closer to the laundry hook ups to multitask, Add outdoor cooking area and benches, more outdoor lighting for safety.	As a result of feedback from culturally-specific communities of color, the following design adjustments were made: 2 bathrooms placed in 3 & 4-bedroom units, 3 and 4 bedrooms have washer dryer hook ups placed by kitchen and dining areas for easier multitasking, a partition placed between the kitchen and living room for 3 and 4 bedrooms, moveable furniture in the laundry room and community room to create a comfortable waiting



to receive project feedback. Developer also interfaced with organizations such as Community Action, Sequoia Mental Health, and Family Promise on feedback related to resident services, referrals, and marketing.		area, changed leasing office to have two entries/exits to address safety concerns, community space layout changed with separate access to the community kitchen, laundry room larger, art or mural wall for foyer, windows/lighting in community room and kitchen were added, an outdoor cooking area was added, outdoor benches were included, play areas were separated by age level.
Hacienda CDC – Dolores 3 focus group sessions	Strong desire for spaces for residents to connect; preferences related to unit finishes; preference related to building color palette; feedback about courtyard fence design and covered outdoor gathering space.	Revised building color palette; revised courtyard fence design; incorporated feedback into materials and finishes selection; provided covered outdoor gathering space; looking for opportunities to foster connection in public circulation spaces.
Hacienda CDC – Dolores 3 advisory round table sessions	Interest in supporting project team with mural artist selection and procurement; interest in assisting with groundbreaking and grand opening ceremonies.	Conversation and planning efforts are ongoing; Advisory Round Table group will continue to be involved and provide guidance and support.

## SECTION 9: INITIAL APPLICATION AND LEASING OUTCOMES

*For projects that are currently leasing or have completed the initial leasing process, please share any progress, lessons learned or best practices related to application and leasing strategies.*

The Nueva Esperanza project was leased-up by the end of calendar year 2023. Best practices from the Nueva Esperanza team included helping applicants early in the process understand the different unit set asides (for income levels and rent amounts) and explaining the annual income limits that qualify someone for a 30% vs 60% unit. This was helpful because it helped the applicant to understand and decide if they can afford the rent or not. Another best practice was to make it very clear to the resident what their deposit payment would be and encourage them to save or seek assistance, so they were ready for move in.

Materials after this page were distributed at the meeting.



Metro



Metro affordable housing bond oversight committee meeting | April 15th, 2024

# Agenda

- Welcome and introductions
- Conflict of Interest Declarations
- Annual Progress Reports: Clackamas County, Washington County, Beaverton, and Hillsboro
- Committee discussion and reflection on themes from local presentations
- Review of upcoming meetings

# Questions for local implementation partners

1. Provide an overview of where your jurisdiction is in the process of committing funds and your timeline for committing remaining funds
2. Share an example of a project(s) that has completed construction. What are your lessons learned on:
  - Equitable contracting and workforce participation
  - Affirmative marketing strategies, partnerships for referral and low-barrier lease up
  - Projects that have included Permanent Supportive Housing. Provide a description of the PSH units, % of building, population served, and service providers
3. Share an example of a project(s) in pre-development
  - Share about any known financing issues including the impacts of private activity bonds shortfall, market issues, or gaps. Does the project have a PAB/LIHTC allocation?
  - Share about the impacts of cost escalation on housing quality. How are development partners and jurisdictions solving for cost increases?
4. What are your overall lessons learned on the Metro AHB?



Metro


# Annual Progress Reports





Metro

# Clackamas County



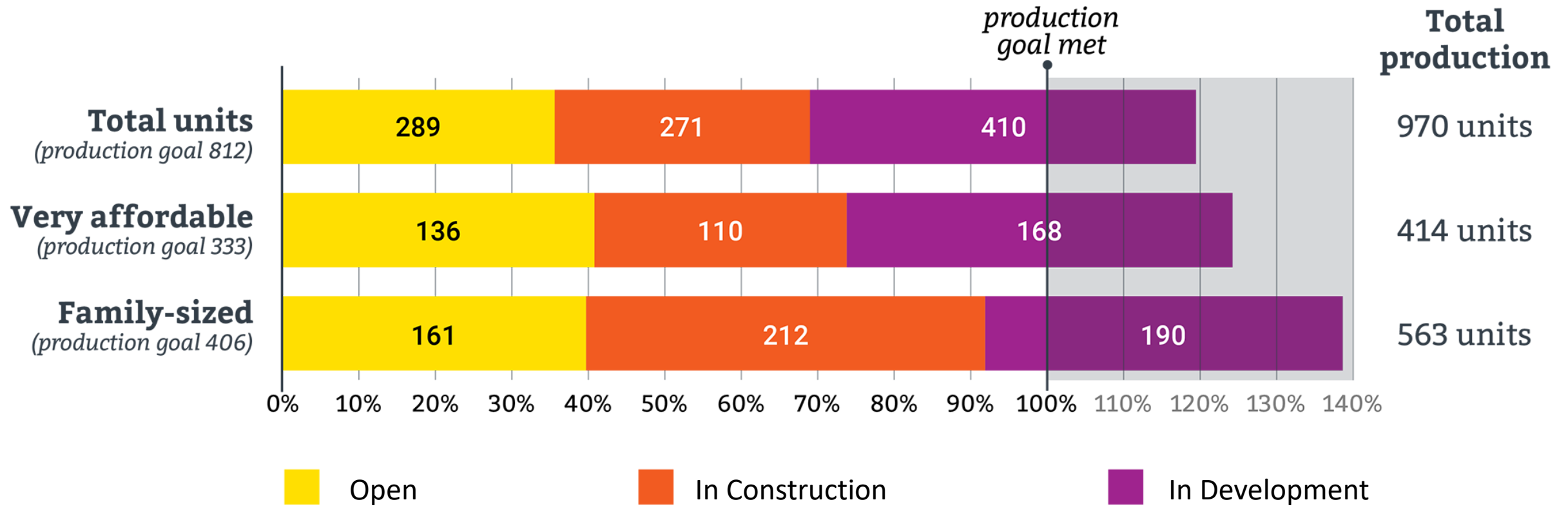
# HOUSING AUTHORITY OF CLACKAMAS COUNTY

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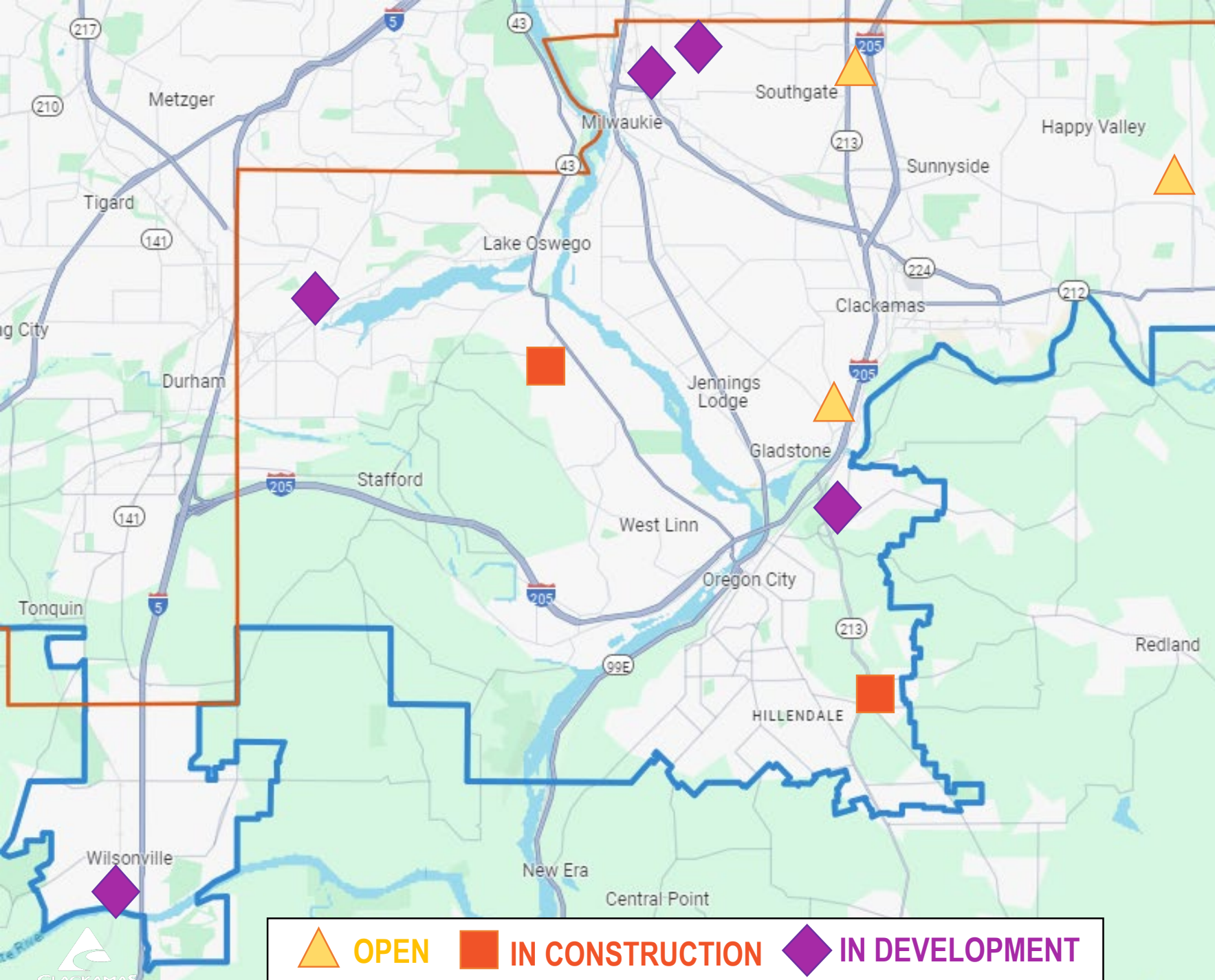
**Metro Bond  
Oversight Committee**

April 15, 2024









**CLACKAMAS COUNTY ALLOCATION**

**\$122MM**

**UNIT PRODUCTION GOAL**

**812**

**TOTAL BOND UNITS EXPECTED**

**1200+**

**UNITS ENDORSED BY COUNTY/METRO**

**970**

**UNITS OPEN**

**289**

**UNITS OPENING IN 2024**

**271**

**UNITS BREAKING GROUND IN 2024**

**356**

**FAMILY-SIZED UNITS**

**562+**

**PERMANENT SUPPORTIVE HOUSING**

**231+**

**DEEPLY AFFORDABLE UNITS**

**414+**

**\$100MM ALLOCATED**

**\$22MM EARMARKED**





**GOOD SHEPHERD VILLAGE**

- OPENED FALL 2023
- 143 UNITS, INCLUDING 58 PSH
- COBID CONTRACTING OUTCOMES:
  - 30% SC | 34% HC
- WORKFORCE DIVERSITY:
  - 64% POC, 2% WMN, 14% APP







## HILLSIDE PARK PHASE I

- PUBLIC HOUSING REPOSITIONING & REDEVELOPMENT PROJECT
- BUILDING C - 100 UNITS: CLOSING THIS SUMMER
- BUILDINGS A & B - 175 UNITS: CLOSING THIS FALL
- 275 TOTAL UNITS, INCLUDING 21 PSH, SUPPORTED W/ SHS SVCS \$







## SHORTSTACK MILWAUKIE

- 15 AFFORDABLE HOMEOWNERSHIP UNITS; CLOSING THIS SUMMER
- ~900SF 2 BEDROOM / 1.5 BATH, 2-STORY COTTAGES
- UTILIZES CITY OF MILWAUKIE'S RECENTLY ADOPTED COTTAGE CLUSTER ZONING PROVISION





## WILSONVILLE TOD

- 121 UNITS, INCLUDING 20 PSH: CLOSING THIS SUMMER
- COLLABORATIVE P3 PROJECT
- INCORPORATES ~\$4.2MM PSH PILOTS FUNDS
- 20 PB RLRA VOUCHERS & SHS SERVICES SUBSIDY



# REFLECTIONS: METRO AHB PROGRAM



## SUCCESSSES

- EQUITY FOCUS
- CLEAR PROGRAM GOALS
- ADVOCACY AND COLLABORATION
- LEVERAGING OUTSIDE FUNDS
- SHS INTEGRATION

## OPPORTUNITIES

- ADDITIONAL LIP TECHNICAL ASSITANCE
- MORE ADMINISTRATIVE PROGRAM FUNDING
- PREDEVELOPMENT FUNDING OPPORTUNITIES
- MARKETING & PROMOTING PROGRAM SUCCESS TO PUBLIC

☆ THANK YOU! ☆

QUESTIONS?





Metro

# Washington County





Department of  
Housing Services

# Washington County

## Metro Housing Bond Oversight Committee Annual Presentation

**Molly Rogers**, Director of Housing Services  
**Jill Chen**, Assistant Director  
**Andrew Crampton**, Development Manager

| April 15, 2024



# Addressing Housing Need in Washington County

**44%**

**of Washington County residents are cost burdened**

ACS, Comprehensive Housing Affordability Strategy, 2015-2019

**\$1,695**

**Median gross rent in Washington County**

Making it the most expensive county for renters, U.S. Census Bureau 2018-2022

**4.98%**

**Washington County rental vacancy rate**

Multifamily NW Report Fall 2023

**858**

**People have been housed in six Washington County sponsored Metro Bond projects**

**1,900**

**Approximately how many people will be housed upon completion of 12 projects.**

## Production Targets & Accomplishments for Washington County

	Target	Completed	In Progress**	Total Estimate of Units	% Estimate to Target
Total Housing Units Production Target	814	453	419	1044	128%
# with 2 or more bedrooms	407	210	226	554	136%
# for 30% MFI Households	334	203	137	358	107%
# of Permanent Supportive Housing*	100	119	54	173	173%

\*PSH Unit Counts for future projects will be reevaluated based on chronically homeless definitions, coordinated care entry, and in-place rent assistance and supportive services

\*\*In progress units include projects under construction or Concept Endorsement Received





# Completed: Cedar Rising

- Worked with Polaris Electric, COBID firm, \$2,079,958 total contract value
- 64% of workforce hours were performed by workers of color
- Over 40 organizations provided 104 application referrals, which was critical to relatively expedient lease-up time, over 800 applications received







# Under Construction – Plaza Los Amigos







# Predevelopment: Woodland Hearth

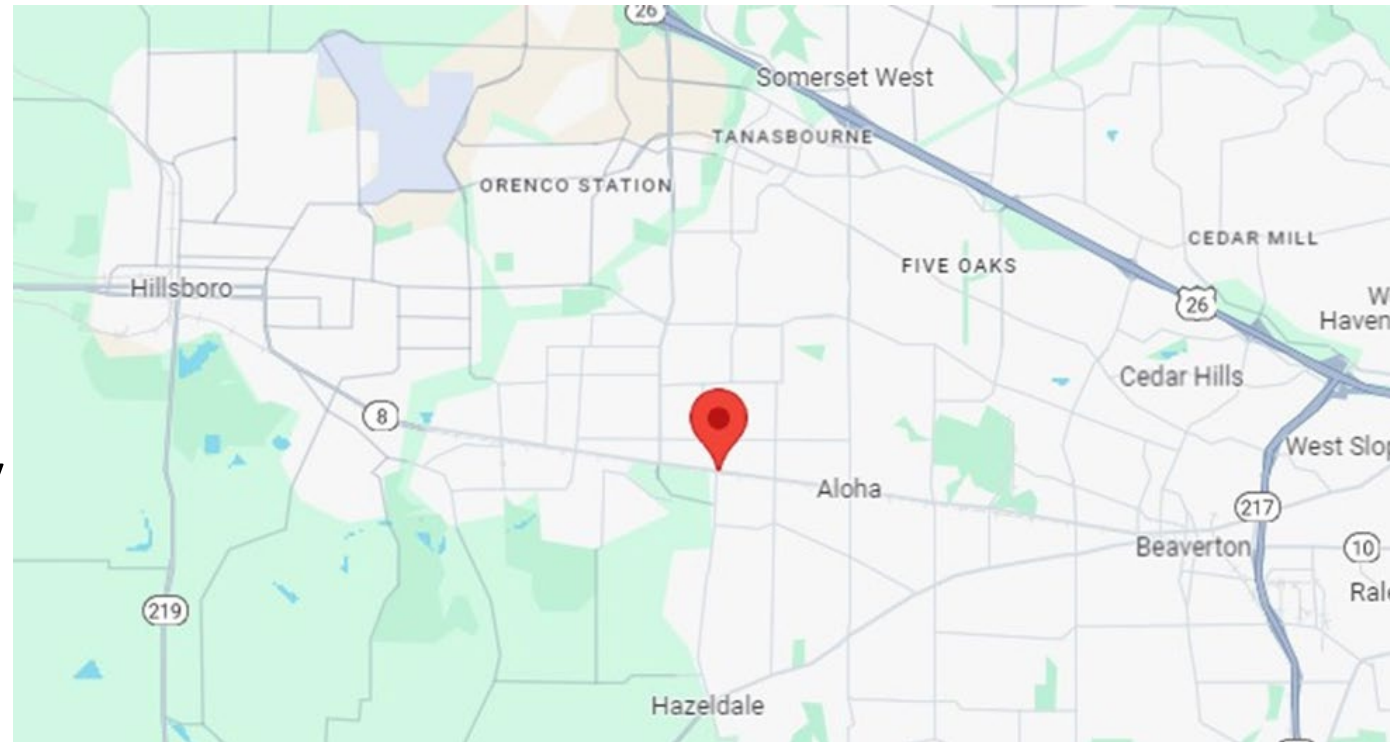
- Financial Closing Planned for November 2024 for the 63-unit community.
- The project received \$1.5 million funding from Senate Bill 1530 to support required infrastructure improvements.
- Washington County has submitted a request for congressional earmark





# Predevelopment: Aloha 209<sup>th</sup>

- Metro's Site Acquisition Team acquired the property in January 2024 to support approximately 86-units in a four-story, elevator served building
- Metro and Washington County are working with Unite Oregon on community outreach to inform the project
- In February 2024, The County's Housing Authority Board of directors authorized the Authority to begin predevelopment





# Workforce Development





# Program Considerations

- COBID Supports Workforce Development but Add Cost
- PSH Units Require Long Lease-Up Timelines
- Community Networks Critical for Lease-Up Speed
- Deeply Affordable Units Need Support Services
- High Operating Costs due to Higher Needs



# Committee Feedback



- *What questions or comment does the Metro Housing Bond Oversight Committee have for Washington County?*





Metro

# Beaverton

# BEAVERTON UPDATE



April 15, 2024 – Affordable Housing Bond Oversight Committee

# Metro Affordable Housing Bond

## BEAVERTON PORTFOLIO ACTUAL (4-15-2024)

Project	2+ Bd	30% AMI	PBV	Total Units
The Mary Ann	29	11	8	54
Elmonica	33	33	8	81
Senior Housing on 5th	0	68	19	104
Amity Orchards	113	17	0	164
<b>Total</b>	<b>175</b>	<b>129</b>	<b>35</b>	<b>403</b>
<b>Metro Target</b>	<b>109</b>	<b>89</b>	<b>n/a</b>	<b>218</b>

# The Mary Ann



The Mary Ann house 117 people, 46 of which are under 18 yrs old.

- Head of Household – Black/African American: 4
- Head of Household – American Indian/Alaska Native: 1
- Head of Household – Asian: 4
- Head of Household – Native Hawaiian/Other Pacific Islander: 1
- Head of Household – Latino/Hispanic: 9



# Amity Orchards

WISHCAMPER



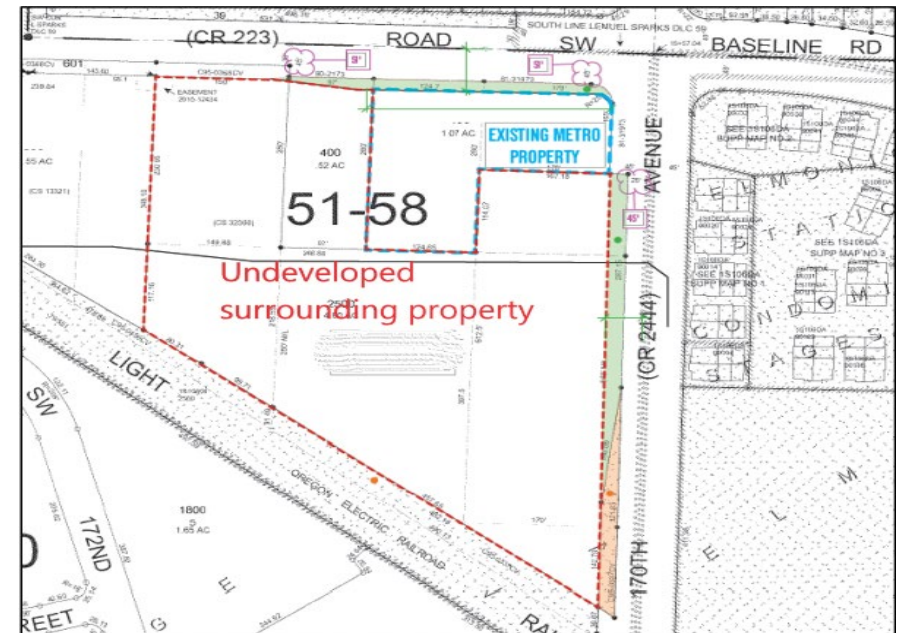
Mid-December: Building 2 complete  
Mid-February: Building 3 complete  
Mid-May: Building 1 complete



# ELMONICA



Fall 2023: Construction begins  
Winter 2024-25: Construction complete



## Challenges:

- Challenging site location
- Required multijurisdictional approvals
- Opportunity to develop/co-develop adjacent property (5.43 acres)



# Senior Housing on 5th



104 units  
68 units at 30%  
30 PSH units



- Current – Summer 2025: Predevelopment
- Summer 2025: Construction begins
- Winter 2026-27: Construction complete



# Questions?



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April 15, 2024



Metro

# Hillsboro



# **Regional Housing Bond Implementation Annual Report**

**Chris Hartye, Senior  
Project Manager**

**April 15, 2024**





## Question #1: Implementation Status – Commitment of Funds

Project	Metro Bond Funds Committed	Total Units	30%	Family Size
Nueva Esperanza	\$16,940,731	149	60	105
The Dolores	\$10,500,000	66	30	46
<i>Total Committed or Underway</i>	\$27,440,731	215	90	151
<i>Remaining</i>	\$13,799,350 (+ \$1.875 M)	69	27	Goal Exceeded

Timeline for Remaining Funds: Concept Endorsement and commitment on “Project 3” anticipated in first quarter 2025



## Question #2: Completed Project Lessons Learned

### **Nueva Esperanza – Bienestar/HDC, 149 Units, 100% Leased**

Equitable contracting and workforce participation:

- Project achieved over 30% COBID participation on hard costs
- Did not track workforce

Affirmative marketing strategies, partnerships for referral and low-barrier lease up:

- Culturally specific Sponsor, local to Hillsboro, strong partnerships with other culturally specific CBO's

Did not include PSH from outset but is home to 9 residents with Long-term Rental Assistance Vouchers through Metro SHS funds.



## Question #3: Project in Pre-Development

**Dolores, Hacienda CDC, 66 Units, Construction Start: Sept. 2024**

Financing issues:

- Project awarded LIHTC and PABs in 2024, but LIHTC pricing is low
- Design is cost-efficient without sacrifices in quality
- Development partners seeking grants, deferring developer fees, public site so land basis costs removed
- Includes 8 PBVs, 12 RLA Vouchers, SHS operational funding commitment

Does include 12 dedicated PSH units (New Narrative), will track workforce participation



# Overall Lessons Learned

**And thanks for your time,  
questions and consideration!**



# Review of Upcoming Meetings

## 2024 meeting calendar:

- ✓ April 1 – Jurisdiction annual progress presentations #1
- ✓ April 15 – Jurisdiction annual progress presentations #2
- May 13 – (*in person/hybrid*) Annual report key findings and report highlights form staff, discuss finding and recommendations for HBOC cover letter
- June 10 – Final committee findings and recommendations for cover letter, high level feedback on draft annual report
- *June TBD* – Co-chairs presentation to Metro Council



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