



600 NE Grand Ave.
Portland, OR 97232-2736

Council work session agenda

Tuesday, April 30, 2019

2:00 PM

Metro Regional Center, Council Chamber

2:00 Call to Order and Roll Call

2:05 Safety Briefing

Work Session Topics:

2:10 Housing Bond Implementation Update

[18-5202](#)

Presenter(s): Jes Larson, Metro
Emily Lieb, Metro

Attachments: [Work Session Worksheet](#)
[Emerging Best Practices](#)

2:55 Legislative Update

3:25 Chief Operating Officer Communication

3:30 Councilor Communication

3:35 Adjourn

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬស្នើសុំទទួលបានកម្មប្រព័ន្ធរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំស្នើសុំអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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Housing Bond Implementation Update

Work Session Topics

Metro Council Work Session
Tuesday, April 30, 2019
Metro Regional Center, Council Chamber

HOUSING BOND IMPLEMENTATION UPDATE

Date: April 17, 2019
Department: Planning & Development
Meeting Date: April 30, 2019
Prepared by: Emily Lieb, 503-797-1921

Presenters: Elissa Gertler, Jes Larson,
Emily Lieb
Length: 45 minutes

OVERVIEW

Staff will provide an update on Regional Investment Strategy implementation activities underway for the Affordable Housing Bond Program, including:

- Local Implementation Strategies and community engagement
- Phase 1 Projects
- Community Oversight Committee
- Metro Site Acquisition Implementation Strategy and community engagement

Staff request Council clarification and direction on key policy issues, framed below, that relate to planning for Metro's Site Acquisition Implementation Strategy. The Strategy will be further shaped with input from community engagement in the next two months and will guide investment of up to \$62,016,000 in Housing Bond Funds. The Program will seek to support Local Implementation Partners in achieving the overall Unit Production Targets and to ensure alignment with guiding principles, including advancing racial equity.

ACTIONS REQUESTED

No immediate Council action is requested. Staff seek clarification and direction regarding immediate policy questions related to development of the Regional Site Acquisition Implementation Strategy.

Anticipated next steps for the Regional Site Acquisition Implementation Strategy include:

- April-May: Community engagement and coordination with Local Partners
- July: Council Work Session discussion of engagement outcomes and draft strategy
- August: Community Oversight Committee review of proposed implementation strategy; potential recommendation to Metro Council for approval
- September: Metro Council potential approval of Implementation Strategy and any related Work Plan amendments necessary to support the Council's policy direction

POLICY ISSUES AND REQUESTED DIRECTION

- 1) **Staff seek Metro Council confirmation that the Site Acquisition Program should seek to support the following outcomes.**

- A. ***Pilot-testing innovative approaches to cost efficiency, advancing racial equity and community benefits*** in projects developed on Metro acquired sites. Examples could include pilot projects incorporating homeownership, innovative housing types, supportive housing, modular construction, project labor agreements, and other emerging best practices for advancing racial equity (see attached *Emerging Best Practices to Operationalize Racial Equity in Affordable Housing Investments*).
- B. ***Complementary community investments***, as achieved through coordination with Metro's Regional Investment Strategy and local investment activities.
- C. ***Alignment of investment locations with existing Metro policies related to growth management, anti-displacement, and fair housing/housing choice***, resulting in investments in centers and corridors, neighborhoods with high displacement risk, and places with historic or potential future patterns of segregation.
- D. ***Distribution of investments across the region*** to support progress toward unit production targets.

2) Staff seek Metro Council confirmation that Metro's Regional Site Acquisition Program funds may be applied toward gap funding to support subsequent development that aligns with Program goals.

The Housing Bond Work Plan provides flexibility for Metro's Regional Site Acquisition Program funds to be used to ensure subsequent development of projects on sites acquired through the Program. Site development will be coordinated with Local Implementation Partners, who will also be investing in project development on Metro acquired sites.

This flexibility enhances Metro's ability to support geographic distribution of Regional Site Acquisition investments and proportionate allocation of funding between land purchase and development costs to best support progress toward housing production targets. It also supports Metro's ability to incentivize innovation and best practices in implementation.

3) Staff seek Council confirmation regarding approaches to advancing racial equity in Metro's Site Acquisition Program.

Section 6.1 of Metro's Affordable Housing Bond Program Work Plan requires that Metro's Regional Site Acquisition Implementation Strategy include a strategy for advancing racial equity throughout implementation, in alignment with applicable Local Implementation Strategy approaches. This will be achieved through the following Strategy elements, consistent with requirements laid out in Exhibit C of the Work Plan:

- ***Location prioritization criteria*** that consider geographic distribution of housing investments, access to opportunity, strategies to address racial segregation, and strategies to prevent displacement and stabilize communities. These criteria will be developed to align with prior Council direction and established policy and further

shaped through conversations with Local Implementation Partner staff and community engagement currently underway;

- ***Plan to align with Local Implementation Strategies*** regarding:
 - fair housing strategies/policies to eliminate barriers to access;
 - requirements or competitive criteria for project to align culturally specific programming and supportive services to meet the needs of tenants;
 - engagement of communities of color and other historically marginalized communities to shape project outcomes
- ***Strategies for increasing economic opportunities for people of color*** throughout implementation, which could include goals or competitive criteria related to diversity in contracting or hiring.

4) Staff seek direction regarding establishment of specific goals for equitable contracting and workforce participation as part of Metro's Site Acquisition Program.

During the April 30th Work Session, staff will outline specific policy options the Council could consider, including costs, benefits, opportunities, and risks associated with different potential approaches to equitable contracting and workforce participation in projects developed through Metro's Regional Site Acquisition Program. Below is a preliminary summary of opportunities and challenges.

MWESB Goals

Minority, Women, and Emerging Small Business (MWESB) goals can be used to incentivize developers to contract with a certain percentage of registered MWESB businesses. MWESB goals are administered through "good faith efforts" by which developers commit to reaching out to a certain number of qualified businesses. Developers report on outreach and outcomes and public agency procurement offices monitor and report on progress toward goals.

Advantages:

- MWESB programs are relatively low cost and easy to implement.
- Setting of goals sends a clear message to industry partners that will result in the expansion of capacity over time.

Challenges:

- MWESB goals only reflect diversity in the ownership of contracted firms (defined as 51% ownership); they do not represent works actually employed on the job.
- There are a limited number of qualified MWESB firms in the region; this could impact the ability of projects to move forward and for the targets to be met.

- While some developers report no cost impact of a project goal of 20% MWESB goal, it is unclear of what the cost impacts might be of a significant increase in MWESB goals across the region.

Existing Landscape:

Currently, the majority of the eligible bond implementation jurisdictions do not have MWESB goals. Portland and Home Forward both have a 20% MWESB goal with a plan to get to 30% in five years. Other jurisdictions do not currently have goals but have indicated plans to consider them as part of Local Implementation Strategies. Oregon Housing and Community Services (OHCS) does not currently have an MWESB goal for funding they administer but is undertaking a statewide assessment to explore opportunities for incorporating MWESB goals into state program requirements.

Workforce Goals

Workforce participation goals may include goals for apprenticeship hours and workers who are women or identify as people of color. Participation outcomes are monitored through certified payroll systems that allow a general contractor to track hours worked by designated employees on each job. These policies are enforced by public agency staff assigned to randomly visit job sites.

Advantages:

- Workforce participation goals have a much greater impact on advancing economic opportunities for people of color, because they create benefits for people employed on projects, not just those who own the firms.
- Capacity building efforts such as the Construction Careers Pathways Project, also known as C2P2, are working to increase capacity to support a more diverse construction workforce.

Challenges:

- Workforce participation is much more costly to monitor and enforce, and requires investment in specialized software as well as ongoing staff capacity for monitoring and enforcement.
- There is a shortage of women and minority labor and apprenticeship programs, creating capacity challenges that cannot be solved through public agency goals alone, but require sustained investment in capacity building over time.

Existing Landscape:

Portland and Home Forward both have 20% apprenticeship goals with aspirational sub-goals for people of color (18%) and women (9%). Other jurisdictions do not currently have goals and have not indicated plans to consider them as part of Local Implementation Strategies, due to the cost of administration. Several but not all eligible Local Implementation Partners have signed on to the C2P2 initiative.

BACKGROUND

The Housing Bond Program Work Plan states that up to 10 percent of Bond Measure funds will be retained by Metro for the Regional Site Acquisition Program, which will seek to support Local Implementation Partners in achieving unit production targets. Program funds will be used to purchase regionally significant sites and may be used to help ensure subsequent project development.

Metro will create an implementation strategy outlining strategies for ensuring that regional site acquisitions are coordinated with Local Implementation Partners and aligned with the program's guiding principles. The Regional Site Acquisition Implementation Strategy will be informed by community engagement and coordination with Local Implementation Partners over the next two months, as well as by previous Council direction and existing Metro policy. The Strategy will be reviewed by the Community Oversight Committee in August, resulting in a potential recommendation to Metro Council for approval.

ATTACHMENTS

Emerging Best Practices to Operationalize Racial Equity in Affordable Housing Investments

- Is legislation required for Council action? Yes No
- If yes, is draft legislation attached? Yes No



Metro



SPRING 2019

Emerging best practices to operationalize racial equity in affordable housing

The regional affordable housing bond offers greater Portland an important opportunity to advance racial equity. The bond will create affordable homes to serve 12,000 people who are not currently served by the housing market, who have not had opportunities to access other public investments in affordable housing, or who live in communities at risk of displacement. Housing barriers affect all communities but have most deeply impacted communities of color. By focusing our policies and investments to benefit communities of color, we can reduce racial disparities while benefiting all disadvantaged members of our community.

The housing bond program will address historic barriers by focusing investments towards serving families and people with very low incomes. Of the 3,900 homes that will be produced through bond investments, at least 1,950 must have two or more bedrooms, and at least 1,600 will be affordable to households making 30% or below of area median income (AMI). In addition, racial equity will be advanced throughout program implementation, from who is hired to build the homes, to how people are encouraged and supported to access the homes the bond creates, to how programs are designed to serve residents.

Metro seeks to support our colleagues, partners and the broader community as we work together to implement the regional housing bond program. This document offers emerging best practices and strategies to design and implement programs that advance racial equity. We consider this a living document and welcome feedback to improve it.



1. Addressing structural racism

Structural racism refers to the complex system of public policies, institutional practices, and other cultural norms by which racism is developed and protected. Dismantling these systems is essential to eliminating racial disparities. We recommend multiple approaches and intentional consideration at every level of affordable housing development and program implementation.

Suggested practices

- **Make decisions with community:** Integrally involve people of color and organizations that represent communities of color in policy and funding decisions. Actively remove barriers for organizations and communities to ensure full participation by providing stipends, scheduling events at accessible times and locations, and other supportive engagement tactics.
- **Teach equity:** Provide ongoing/continuing education equity training opportunities that include anti-racist curricula for all project partners, including building owner and management staff, resident services staff, and partners that support residents.
- **Measure and evaluate outcomes:** Set measurable goals for advancing racial equity and identify metrics for monitoring outcomes. Establish meaningful and ongoing communication with community-based organizations to review metrics and methods used to evaluate program impact. Consider evaluation as a tool to expand community engagement in the program, identify challenges and opportunities for further progress, improve program implementation to achieve identified outcomes, and celebrate accomplishments and successes.

- **Activate public support:** Provide proactive community education and engagement opportunities to inform neighbors about specific projects and build broad support for affordable housing. Demonstrate ‘good neighbor’ programming and support those who wish to see more affordable housing in the community.

2. Increase access for people of color

Common screening practices disproportionately screen out people of color and are incongruous with Fair Housing regulations. Practices that “screen in” rather than “screen out” applicants and affirmative marketing strategies will increase access to affordable housing opportunities for communities of color.

Suggested practices

- **Clear information with remedy and appeal options:** Make screening criteria readily available on housing websites and in marketing materials. Provide information in multiple languages.
- **Accommodate credit scores:** Allow applicant to demonstrate financial soundness with alternate documentation. Make exceptions for medical and education debt, and when the applicant is on a feasible repayment plan. Coordinate with nonprofits that specialize in housing counseling.
- **Allow alternative documentation:** People who have had unstable housing situations or have experienced homelessness may not have retained documents. Consider additional forms of ID or documentation to satisfy application requirements. Accept references from professional contacts, a case manager, faith leader, or other personal contact if applicants cannot provide landlord references. Allow applicants additional time to secure necessary documentation while holding the apartment.
- **Look beyond histories:** Recognize that people of color are disproportionately impacted by the structural racism within the criminal justice system. Consider only recent or serious crimes that relate to the safety of the property and other tenants. Screen for criminal background only after applicant has met all other qualifications. Educate applicants on how to submit a reasonable accommodation request during the application process.

- **Offer remedy and appeal options:** If an application is denied, provide clear and direct information to applicant about the nature of the denial and options to remedy or appeal. Allow the applicant to work directly with building owner and management without having to go through the screening company.
- **Get the word out:** Work with community-based organizations that have direct and frequent contact with culturally specific communities to inform and solicit housing applications from households of color and historically marginalized communities. Be mindful of differences in media preferences when advertising. Collect data to determine if affirmative marketing strategies have been effective.
- **Provide accessibility:** Rates of disability are similar among white people and people of color; however, people of color are five times more likely than the general population to report experiencing discrimination based on disability. Set production targets for physically accessible and adaptable units and ensure that accessible units are available at the lowest tiers of affordability. Partner with service agencies to provide supportive housing – housing paired with ongoing, intensive supportive services that can address the spectrum of needs of the community.
- **Consider staffing:** Intentional staffing and programming can ensure equitable success for tenants of color. Conduct tenant meetings to gather feedback and engage tenants to foster communicative and trusting relationships between tenants and property managers. Hire staff of color and culturally specific service providers. Fund peer support programs that employ staff with lived experience to support residents.

3. Intentionally locate housing opportunities

Creating affordable housing in areas with good access to jobs, quality schools and mixed-income communities improves outcomes for families with low incomes, especially for children. Additionally, creating affordable housing in communities at risk of displacement often means more affordable housing where communities of color live. This can help keep communities intact by helping people stay in areas where they have family, friends, and community institutions and gathering places.



Suggested practices

- **Connect communities to higher opportunity:** Allow for higher costs of affordable housing investments in high-opportunity areas. Understand that communities of color may define opportunity differently. Engage culturally specific and historically marginalized communities to understand location preferences and supports needed to thrive in new neighborhoods. Use marketing strategies that explicitly convey that people of color are welcome to apply.
- **Acquire and improve:** Invest in affordable housing opportunities where people of color already live by acquiring unregulated affordable housing to protect existing tenants, improve housing conditions, and ensure that programming is culturally responsive to the community.
- **Invest in the community:** Work with transit providers and transportation network companies to ensure adequate transportation options for people who live in lower-income communities. Partner with community programs to support access to opportunity, economic mobility, and quality of life in conjunction with affordable housing investments.



4. Creating workforce opportunities

People of color are not equally represented in construction and other professional opportunities created by affordable housing development and operations. Women represent just four percent of the construction workforce. The development and construction and management of affordable housing units represents opportunities to increase representation of people of color and women in this field.

Suggested practices

Improve contracting diversity: Set goals and competitive criteria to increase diversity in contracting for projects. Use “good faith effort” requirements for outreach to MWESB contractors. Recognize contractors who exceed the hiring requirements and award them additional points on future bids. Make a plan to increase MWESB goals over time. Make particular efforts to contract with minority and women owned businesses, in addition to more readily available Emerging Small Businesses.

Set goals for apprenticeship and workforce: Set goals for apprenticeship and labor participation by women and people of color. Use a certified payroll and workforce reporting software program to monitor compliance with workforce diversity goals and prevailing wage compliance management. Offer admin support with reporting requirements to small firms who may not have the in-house capacity to complete required monitoring and reporting.

Create new capacity: Jurisdictions can help build and support a diverse workforce by joining Metro’s Construction Careers Pathways Project (C2P2), a project aimed at building capacity in the construction workforce in public investments.

Support living wages: Work with the labor community to create community benefits agreements that define workforce goals and commitments to wages in each project, including ongoing operations jobs.

oregonmetro.gov/housing



Arts and events
Garbage and recycling
Land and transportation
Oregon Zoo
Parks and nature

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Hello, we’re Metro.

Metro brings people together to shape the future of greater Portland and provides places, services and tools that work best at a regional scale. Led by an elected council, this unique government gives Oregonians a voice in their community.

Parks and nature

Metro protects clean water, restores fish and wildlife habitat, and connects people to nature across 17,000 acres of parks, trails and natural areas – and the Oregon Zoo.

Land and transportation

Metro plans for new homes, jobs, transportation options and access to local businesses and parks.

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Materials following this page were distributed at the meeting.

Regional affordable housing bond

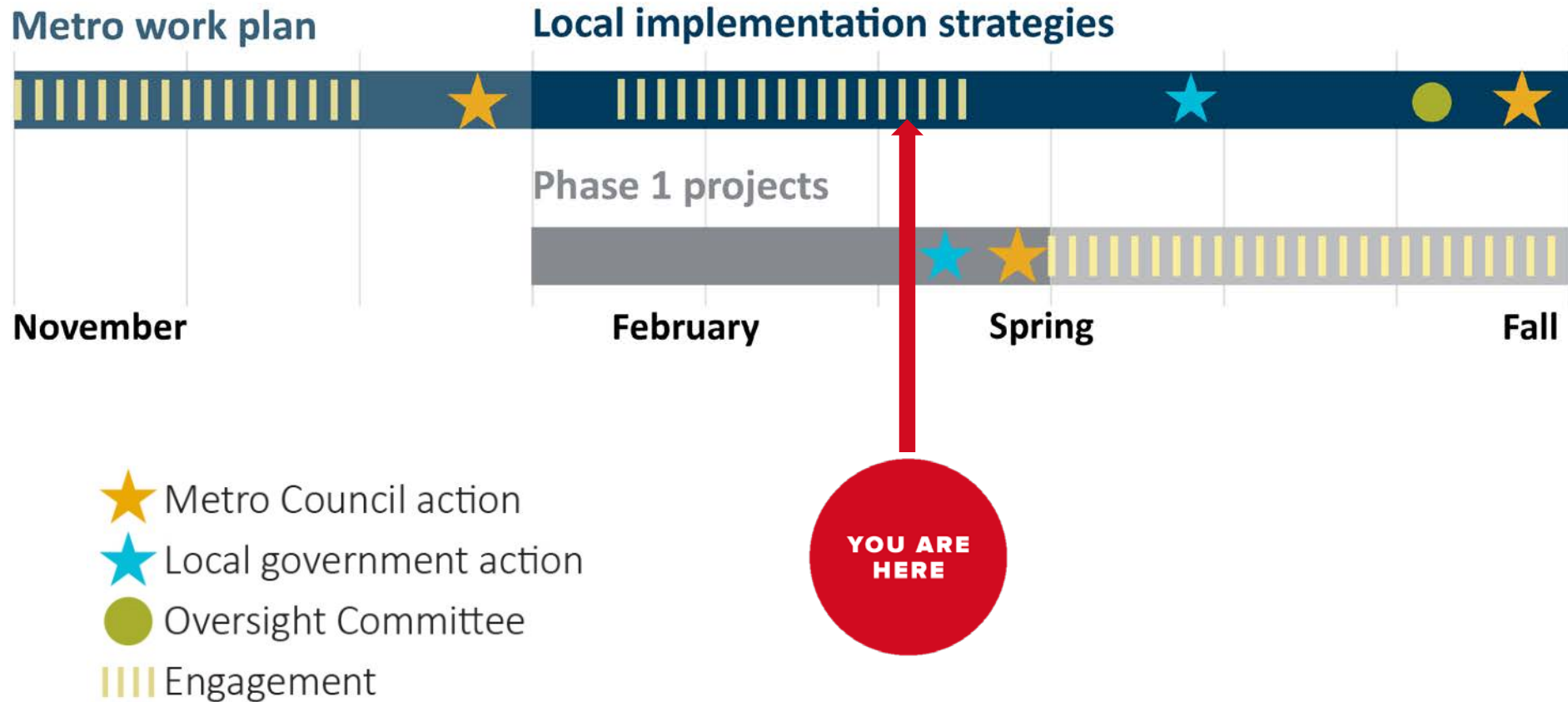
Council Work Session

April 30, 2019



Metro

Timeline to program launch



Implementation strategy requirements

- ✓ **Development plan** including selection criteria/process and approach to achieve unit targets
- ✓ **Strategies for advancing racial equity** (e.g., barriers to access, inclusive contracting/workforce)
- ✓ **Engagement of historically marginalized communities** in strategy development and implementation



Partner engagement

- Public events
 - Beaverton
 - Clackamas Co.
- Discussion groups
 - Home Forward
 - Clackamas Co.
 - City of Portland
- Existing meetings
 - Washington Co.
 - City of Gresham
- Surveys
 - City of Portland⁴



Community Conversation:

Affordable Housing and Metro Regional Bond

Conversación de la Comunidad: Vivienda Asequible y Bono Regional Metro

What's the future of affordable housing in Beaverton? Come share your solutions and learn about Regional Affordable Housing Bond implementation.

¿Qué futuro tiene la vivienda asequible en Beaverton? Venga a compartir su opinión y conozca la implementación del Bono Regional de Vivienda Asequible.

Thursday, April 4 | 5:30-7:30 PM

Highland Park Middle School | 7000 SW Wilson Avenue

5:30 PM – Welcome by Mayor Denny Doyle and Overview
Bienvenida del alcalde Denny Doyle y Perspectiva general

6 PM – Breakout Sessions with Community Members
Sesiones de Discusión con Miembros de la Comunidad

*Everyone welcome. Dinner, Spanish interpretation and childcare provided.
Todos son bienvenidos. Se proporcionará interpretación al español y cuidado de niños.*

BeavertonOregon.gov/housing

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 **Beaverton**
OREGON

Phase 1 projects

Beaverton Mary Ann
Apartments

Clackamas County
Gladstone SRO acquisition

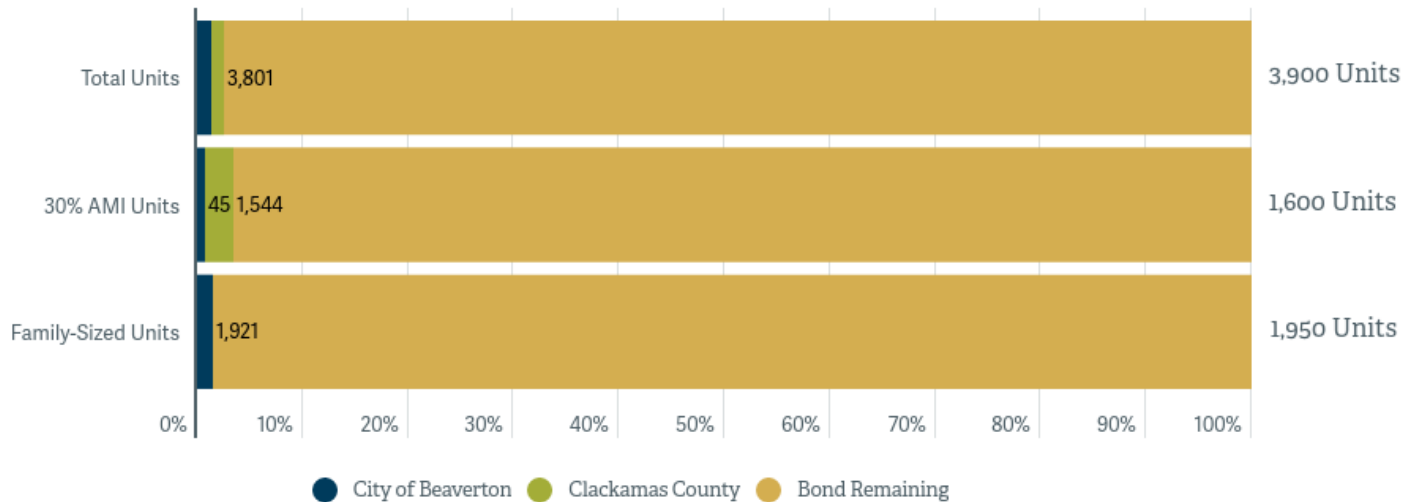
Other identified/potential
Phase 1 projects:

- Portland/Home Forward
- Washington County

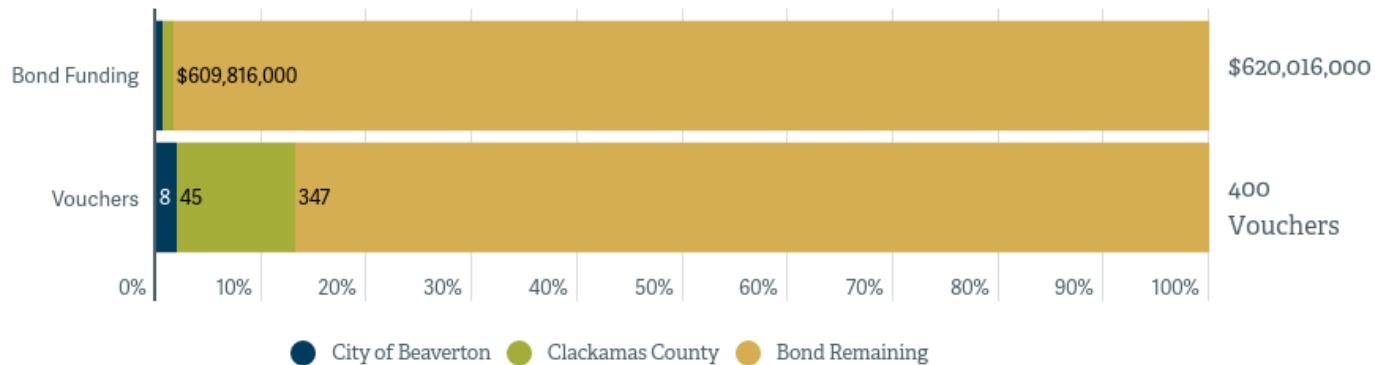


Tracking progress

Production Goals



Production Resources



Oversight Committee



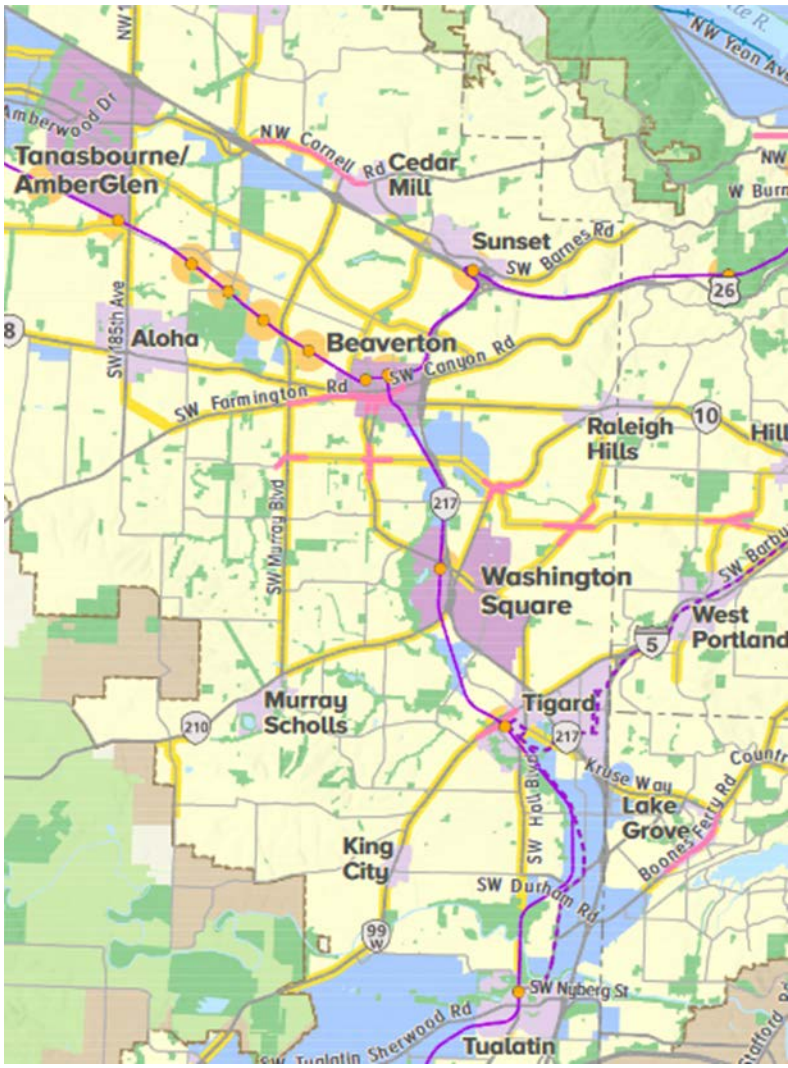
February-April: Three meetings focused on orientation to role

May-June: Jurisdiction meet and greets

July-November:
Implementation Strategy review

Ongoing: Monitoring and annual reports

Metro site acquisition program



Implementation planning and outreach underway

\$62 million for ~8-15 regionally significant sites for affordable housing development

Metro to acquire sites, partner with jurisdiction to RFQ; provide gap financing

Previous Council direction

Location criteria that align with existing Metro policies

Consider other investments (eg, transportation, parks)

Geographic distribution across the region

Look for opportunities to pilot innovations



Coordinated engagement

Coordinated with
Transportation and Parks
& Nature bond planning

Co-created with four
community-based
organizations

Seven events in May

Online survey open now



What we are hearing about location

- Near community
- Near jobs
- Near stores
- Nature / parks
- Good transportation
- Safe area

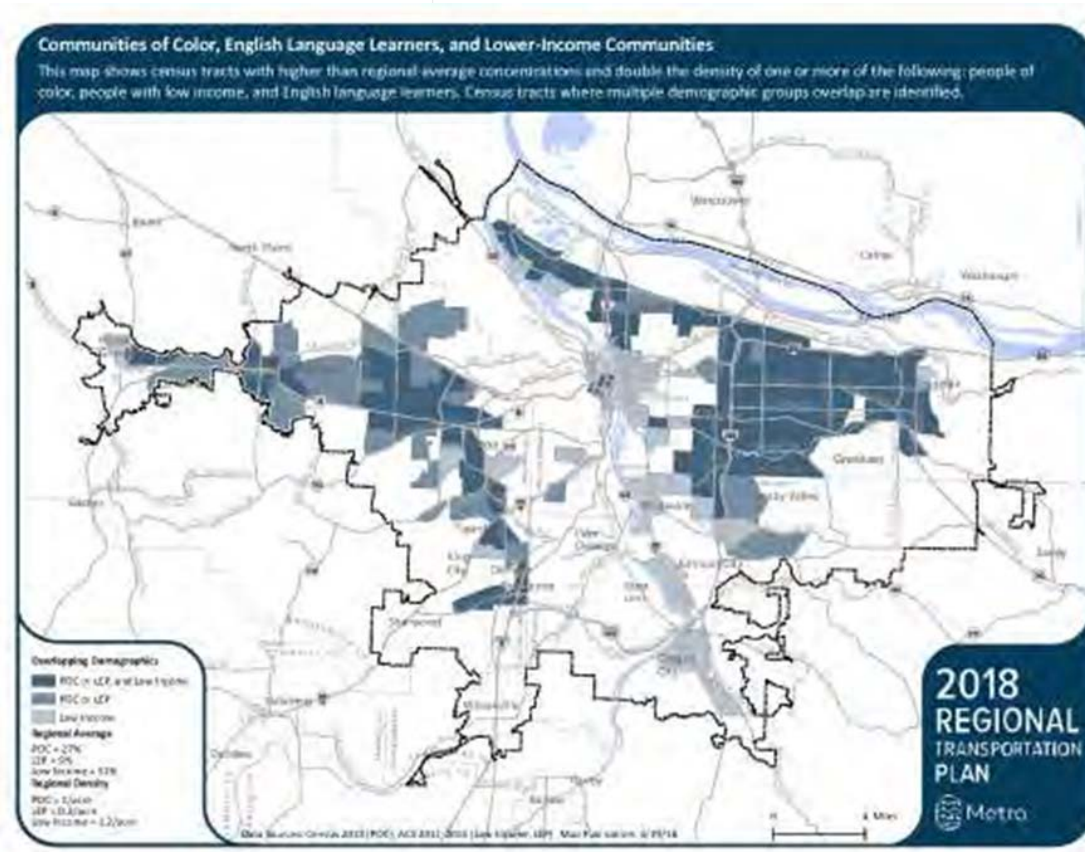


Advancing racial equity

Locations that stabilize communities, provide access, or expand housing choice

Best practices to reduce barriers to access; support partnerships

Advance outcomes for equitable contracting and workforce



Equitable contracting and workforce

Seek C2P2 alignment

Consider project and/or program goals

Consider allocation of additional (non-bond) funds to accomplish program goals



Council Discussion

Does Metro Council support the Site Acquisition Program policy goals, program activities, and engagement approaches?

What goals for equitable workforce and contracting should the Site Acquisition Program incorporate?



Next steps for Council

Phase 1 projects (May-June)

Implementation Strategies:

- Aug. 1: Beaverton and Washington County
- Sept. 5: Clackamas and Metro
- Sept. 26: Hillsboro and Gresham
- Oct./Nov.: Home Forward, Portland



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