Council meeting agenda

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

Thursday, August 1, 2019 **2:00 PM** **Metro Regional Center, Council chamber**

REVISED 7/31

1. Call to Order and Roll Call

2. Safety Briefing

3. Public Communication

4. Consent Agenda

4.1 Resolution No. 19-5005, For the Purpose of Authorizing the Chief Operating Officer to Grant a Trail Easement to the Oregon Department of Transportation — RES 19-5005

Attachments: Resolution No. 19-5005
Exhibit A to Resolution No. 19-5005
Staff report

4.2 Consideration of the Council Meeting Minutes for July 25, 2019 — 18-5258

5. Resolutions

5.1 Resolution No. 19-5003, For the Purpose of Endorsing Paid Parental Leave for Metro Employees — RES 19-5003

Presenter(s): Julio Garcia, Metro

Attachments: Resolution No. 19-5003
Staff Report

6. Presentations

6.1 Housing Bond Local Implementation Strategies For the City of Beaverton and Washington County — 18-5259

Presenter(s): Emily Lieb, Metro

Attachments: Staff Report
Attachment 1 to Staff Report
Attachment 2 to Staff Report
Attachment 3 to Staff Report
Attachment 4 to Staff Report
Oversight Committee Recommendations

7. Chief Operating Officer Communication

8. Councilor Communication

9. Adjourn

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February 2017

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Agenda Item Number 4.1

Resolution No. 19-5005, For the Purpose of Authorizing the Chief Operating Officer to Grant a Trail Easement to the Oregon Department of Transportation

Consent Agenda

Metro Council Meeting
Thursday, August 1, 2019
Metro Council Chamber

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AUTHORIZING THE CHIEF OPERATING OFFICER TO GRANT A TRAIL EASEMENT TO THE OREGON DEPARTMENT OF TRANSPORTATION	)))	RESOLUTION NO. 19-5005 Introduced by Acting Chief Operating Officer Andrew Scott in concurrence with Council President Lynn Peterson

WHEREAS, in 2018 the Metro Council approved Resolution 18-4884 "For the Purpose of Updating the Regional Trails System Plan", which built on 26 years of regional trail planning dating back to the 1992 Metropolitan Greenspaces Master Plan (adopted by the Metro Council via Resolution 92-1637), and identified the 40-Mile Loop Trail as part of the Regional Trails System Plan; and

WHEREAS, in 2009 the Metro Council approved Resolution 09-4017 "For the Purpose of Allocating $67.8 Million of Regional Flexible Funding For The Years 2012 and 2013, Pending Air Quality Conformity Determination" which included over $2.3 million in funding for design and construction of a section of the 40-Mile Loop Trail: Blue Lake Park to Sundial Road; and

WHEREAS, pursuant to Metro Council Resolution 96-2285 "For the Purpose of Authorizing a Phase II Intergovernmental Agreement With Multnomah County Regarding Parks and Other Facilities", Metro owns approximately 47 acres of real property known as "Chinook Landing" Marine Park; and

WHEREAS, pursuant to the Metro Open Spaces, Parks and Streams 1995 Ballot Measure 26-26, Metro owns approximately 41 acres of real property in the Columbia River Shoreline Target Area known as "Columbia Shoreline" Natural Area; and

WHEREAS, the Oregon Department of Transportation requests two permanent trail easements across the Chinook Landing and Columbia Shoreline properties for construction and operation of the Blue Lake Park to Sundial Road section of the 40-Mile Loop Trail; and

WHEREAS, the proposed easement dedications are consistent with Metro's easement policy (Resolution 97-2539B) because of the benefits to the regional trail system; now therefore,

BE IT RESOLVED that the Metro Council hereby authorizes the Chief Operating Officer to grant two permanent easements to the Oregon Department of Transportation in the locations depicted on Exhibits A-1 and A-2 to this Resolution, on terms approved by the Office of Metro Attorney.

ADOPTED by the Metro Council this 1st day of August, 2019.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

Exhibit A-1 to Resolution No. 19-5005

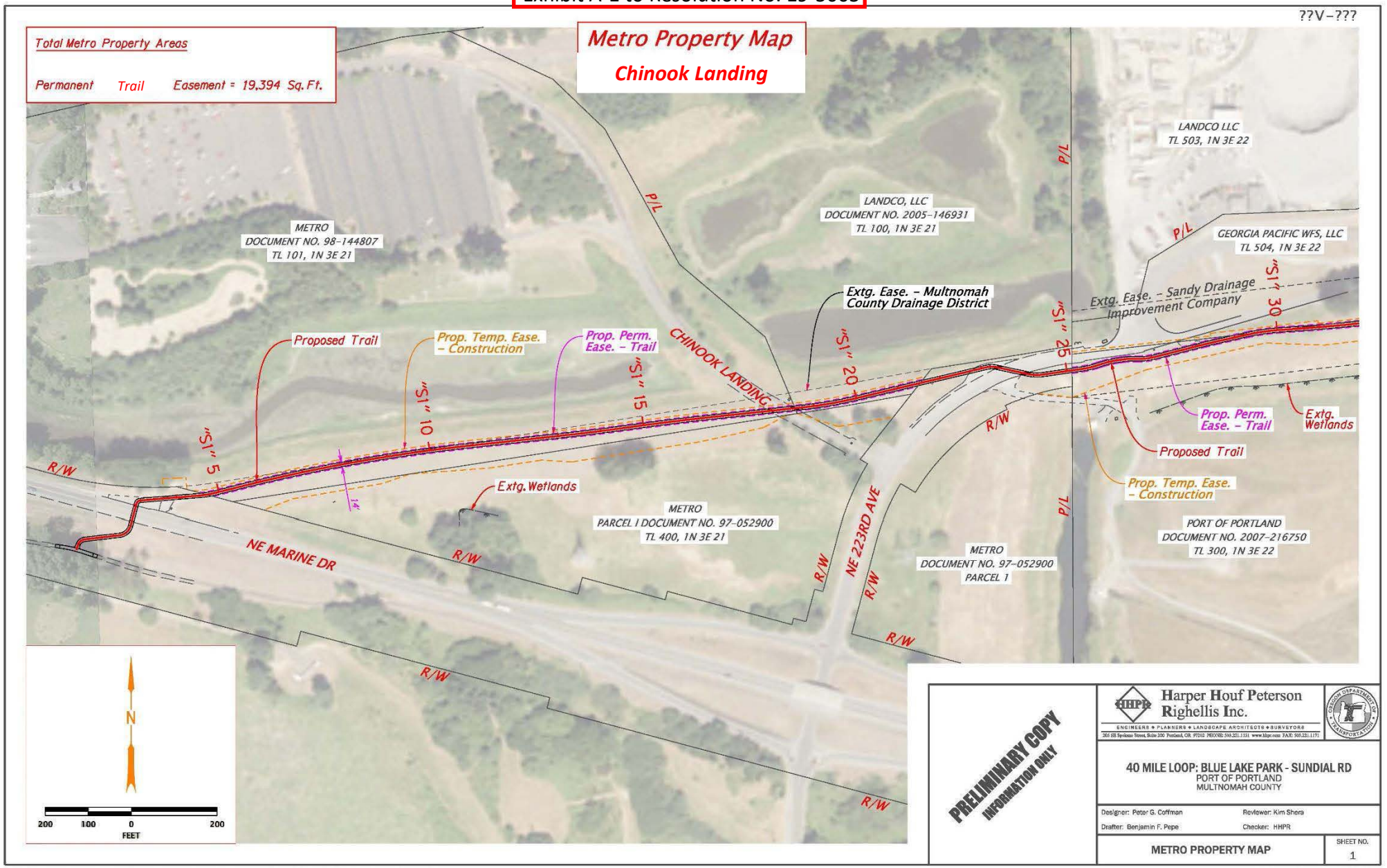
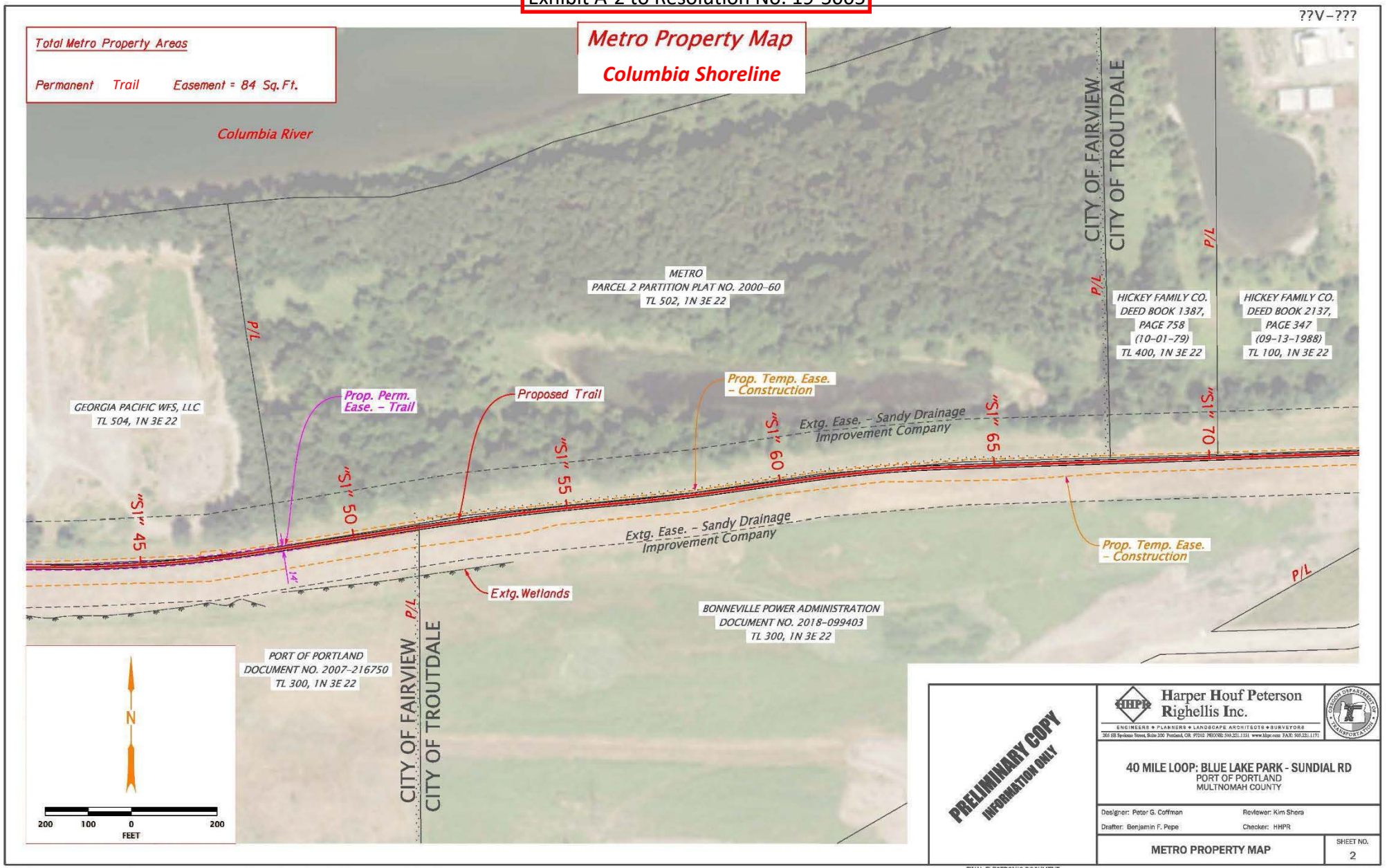


Exhibit A-2 to Resolution No. 19-5005



IN CONSIDERATION OF RESOLUTION NO. 19-5005, FOR THE PURPOSE OF AUTHORIZING THE CHIEF OPERATING OFFICER TO GRANT A TRAIL EASMENT TO THE OREGON DEPARTMENT OF TRANSPORTATION

Date: August 1, 2019
Department: Parks and Nature
Meeting Date: August 1, 2019

Prepared by: Shannon Leary (503-813-7547; shannon.leary@oregonmetro.gov)

ISSUE STATEMENT
ODOT requests the Metro Council authorize the Chief Operating Officer to grant a trail easement of approximately 1,390 feet in length.

ACTION REQUESTED
Metro Council authorization for the Chief Operating Officer to grant a trail easement to ODOT.

IDENTIFIED POLICY OUTCOMES
Continued application of the guidance in the Parks and Nature easement policy (Res. 97-2539B).

POLICY QUESTION(S)
Does the Metro Council wish to support construction of a segment of the 40-Mile Loop Trail on Metro property?

POLICY OPTIONS FOR COUNCIL TO CONSIDER
1. Grant ODOT the easement. This will allow ODOT to construct the entire segment of the 40-Mile Loop Trail without gaps and allows for construction efficiencies.
2. Do not grant ODOT the easement. This will result in a section of the 40-Mile Loop Trail not being built at this time and create uncertainty among partners.

STAFF RECOMMENDATIONS
Staff recommends the Metro Council approve ODOT's easement request and authorize the Chief Operating Officer to grant the easement to ODOT.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION
ODOT, in partnership with the Port of Portland, is in the design stage for a project to build a significant section of the 40 mile loop trail from Blue Lake Park eastward – approximately 2.1 miles in total. This section of the trail crosses Metro park property in two locations and ODOT has requested to acquire approximately 1,390 linear feet of trail easement from Metro (which at 14' in width translates to 19,478 square feet in total). ODOT will acquire the easement and build the trail, and when complete, convey the easement ownership to the City of Fairview, which will own and maintain the trail in perpetuity. The trail design and construction project is funded in part by Metro designated Regional Flexible Funds.

Legal Antecedents

- Metro Resolution No. 92-1637 "For the Purpose of Considering Adoption of the Metropolitan Greenspaces Master Plan"
- Metro Open Spaces, Parks and Streams 1995 Ballot Measure 26-26
- Metro Resolution No. 96-2285 "For the Purpose of Authorizing a Phase II Intergovernmental Agreement with Multnomah County Regarding Parks and Other Facilities"
- Metro Resolution No. 97-2539B "For the Purpose of Approving General Policies Related to the Review of Easements, Rights of Ways, and Leases for Non-Park Uses Through Properties Managed by the Regional Parks and Greenspaces Department"
- Metro Resolution No. 09-4017 "For the Purpose of Allocating $67.8 Million of Regional Flexible Funding For The Years 2012 and 2013, Pending Air Quality Conformity Determination"
- Metro Resolution No. 18-4884 "For the Purpose of Updating the Regional Trails System Plan"

Anticipated Effects

- ODOT will construct approximately 1,390 feet of trail on Metro property and convey the perpetual ownership and management rights to the City of Fairview

Financial Implications (current year and ongoing)

- None

BACKGROUND

The Metro Code requires Metro Council approval of new easements over Metro property. As an owner of almost 18,000 acres of land across the greater Portland region, Metro's Parks and Nature Department receives frequent requests for easements over Metro property for both park and non-park uses. In 1997, to ensure that the habitat and natural area purposes for which voters funded Metro's property acquisition are not eroded over time by non-park uses, the Metro Council approved Resolution 97-2539B (the "easement policy"). The easement policy directs staff to make recommendations to the Metro Council on whether an easement request should be granted, and the policy provides the framework for staff to make its recommendations. Projects designed for the benefit of a Metro park or natural area (a "park use") are recommended for approval.

ATTACHMENTS

None

Agenda Item Number 4.2

Consideration of the Council Meeting Minutes for July 25, 2019

Consent Agenda

Metro Council Meeting
Thursday, August 1, 2019
Metro Council Chamber

Agenda Item Number 5.1

Resolution No. 19-5003, For the Purpose of Endorsing Paid Parental Leave for Metro Employees

Resolutions

Metro Council Meeting
Thursday, August 1, 2019
Metro Council Chamber

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ENDORSING PAID PARENTAL LEAVE FOR METRO EMPLOYEES	)))	RESOLUTION NO. 19-5003 Introduced by Councilor Christine Lewis

WHEREAS, paid parental leave is consistent with the Metro Council's commitment to becoming an Employer of Choice by fostering a family-friendly workplace; and

WHEREAS, the United States stands alone as the only industrialized country with no national paid family leave policy; and

WHEREAS, new parents face real economic and societal pressures to return to work before they are ready because U.S. employer policies and organizational norms have not kept pace with changing realities of our workforce; and

WHEREAS, employers in the public and private sector have implemented paid parental leave, including the City of Portland and Multnomah County; and

WHEREAS, paid parental leave will enhance Metro's ability to attract and retain a qualified workforce; and

WHEREAS, equal, accessible, and adequate paid family leave policy has been shown to narrow the wage gap and increase women in leadership; and

WHEREAS, many low income households cannot afford unpaid leave, and most women return to work sooner than may be ideal for maternal postpartum health; and

WHEREAS, racial disparities in access to wealth and wealth building are compounded by a lack of access to paid family leave and disparities in access to economic supports make it more difficult for families of color to absorb the costs of unpaid leave; and

WHEREAS, health disparities, adverse child birth outcomes, and maternal mortality rates in the United States disproportionately affect women of color, particularly African American mothers, and support for working mothers and families is a component of systemic change beyond the medical model needed to close the gap; and

WHEREAS, paid parental leave will offer Metro families time to bond with their new child and adjust to their new family; and

WHEREAS, Metro celebrates families of all shapes and sizes, and leave will apply to birth parents, non-birth parents, adoptive parents, foster parents, and those who become parents via surrogacy; and

WHEREAS, paid parental leave provides for better health outcomes for parents and for children in that birth mothers may experience reduced stress during and after pregnancy, and the policy may reduce poor health outcomes for both mothers and babies; and

WHEREAS, fathers and non-birth parents will have the opportunity to bond with their children and form patterns in an active child-rearing role; now therefore

BE IT RESOLVED that:

1. The Metro Council endorses paid parental leave for Metro employees following the birth, adoption or foster care placement of a child to give parents time to bond with their new child, adjust to their new family situation, and balance personal and professional obligations;

2. The Metro Council fully supports the Chief Operations Officer's adoption of Human Resources paid parental leave policies and procedures applicable to all employees of Metro;

3. When employees are eligible for family leave under the full implementation of State of Oregon HB 2005 (2019), those provisions may supersede provisions of Metro's Paid Parental Leave policy. Metro Human Resources leadership will track the implementation of the new statewide policy.

ADOPTED by the Metro Council this 1st day of August 2019.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

IN CONSIDERATION OF RESOLUTION NO. 19-5003, FOR THE PURPOSE OF ENDORSING PAID PARENTAL LEAVE FOR METRO EMPLOYEES

Date: July 16, 2019
Department: Council Office
Meeting Date: August 1, 2019

Prepared by: Ramona Perrault 503-797-1941 ramona.perrault@oregonmetro.gov

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ISSUE STATEMENT
Metro's Chief Operating Officer (COO) will implement a new paid parental leave policy for Metro employees on August 1, 2019.

ACTION REQUESTED
The Metro Council adopts this resolution to endorse the COO's implementation of this important benefit.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION
The Metro Council has prioritized examining Metro's employee benefits and workplace culture to ensure the agency recruits and retains top talent, from front line staff to management. The Metro Council supports the agency goals of having a supportive workplace culture and providing professional development opportunities and compensation packages that make Metro competitive as a public employer. Paid parental leave is one step toward realizing progress on this effort and is supported by the unions that represent many Metro employees.

BACKGROUND
In the 2019 legislative session, the Oregon state legislature passed a paid parental leave requirement for all employers. Under Oregon HB 2005, benefits will be payable beginning in 2023. It is advantageous for Metro to join other local jurisdictions in providing this benefit now. When employees are eligible for family leave under the full implementation of HB 2005, those provisions may supersede provisions of Metro's Paid Parental Leave policy. Metro Human Resources leadership will track the implementation of the new statewide policy.

ATTACHMENTS
Resolution No. 19-5003

Agenda Item Number 6.1

Housing Bond Local Implementation Strategies For the City of Beaverton and Washington County

Presentation

Metro Council Meeting
Thursday, August 1, 2019
Metro Council Chamber

HOUSING BOND LOCAL IMPLEMENTATION STRATEGIES FOR THE CITY OF BEAVERTON AND WASHINGTON COUNTY

Date: July 22, 2019
Department: Planning & Development
Meeting Date: August 1, 2019

Prepared by: Emily Lieb, 503-797-1921, emily.lieb@oregonmetro.gov
Presenter(s): Emily Lieb
Length: 15 minutes

ISSUE STATEMENT
In July, the City of Beaverton and Washington County submitted Local Implementation Strategies (LISs) to Metro for consideration. In accordance with requirements set forth in Metro's Housing Bond Program Work Plan, adopted by Metro Council in January 2019, the LISs were informed by community engagement and include a development plan to achieve the unit production targets and strategies for advancing racial equity and ensuring community engagement throughout implementation.

The LISs will be reviewed by the Community Oversight Committee for the Housing Bond Program on July 24, 2019. On Aug. 1, Metro staff will provide a brief overview of the submitted LISs and the Housing Bond Community Oversight Committee's recommendation related to these strategies.

ACTION REQUESTED
This item is informational and will inform potential future action to approve the Housing Bond implementation intergovernmental agreements with the City of Beaverton and Washington County at the Council's September 5, 2019, meeting.

IDENTIFIED POLICY OUTCOMES
The LISs will be a part of the intergovernmental agreements describing the terms under which Metro will disburse Metro bond funding to local government partners for eligible investments and program activities. All proposed affordable housing development projects will be reviewed by Metro for consistency with approved LISs.

POLICY QUESTION(S)
Do the submitted LISs meet the requirements established by the Council in the Program Work Plan? Does the Council have any questions or concerns related to approval of the LISs as part of intergovernmental agreements?

POLICY OPTIONS FOR COUNCIL TO CONSIDER
Upon approval of the Housing Bond implementation intergovernmental agreements in September, the City of Beaverton and Washington County will receive an annual disbursement of administrative funding and will be eligible to begin receiving bond funding for qualifying projects. A decision by the Council not to approve the IGAs (which will incorporate the LISs) could result in program implementation delays.

STAFF RECOMMENDATIONS
No action is recommended for Aug. 1. Staff will recommend that the Council take action to approve the LIS as part of the forthcoming IGA in September.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION
Washington County, City of Beaverton, and the City of Hillsboro – all three eligible implementation jurisdictions in Washington County—conducted coordinated community engagement efforts in spring/summer 2019 that collectively reached 451 community members and over 100 agencies. This engaged informed the development of Local Implementation Strategies, and this month, LISs for Beaverton and Washington County were reviewed by Beaverton City Council and the Washington County Board of Commissioners, respectively, and referred to Metro for consideration.

Beaverton Local Implementation Strategy
Beaverton is eligible for $31,140,595 in Metro bond funding to support eligible projects, and $655,591 in program administrative funds. Disbursement of funds from Metro to the City will be based on demonstrated progress toward achieving the City's share of unit production targets, including a total of 218 total units, of which 89 must be deeply affordable to households making less than 30% of area median income (AMI) and 109 must be family size units (2 bedrooms or more).

To inform the creation of the LIS, the City of Beaverton hosted eight events, include a listening session for the general public and specific outreach targeting the Arabic community, Latino parents in the Beaverton School District, and Habitat for Humanity clients. Events included translation services and childcare and were hosted at a variety of locations and times to ensure inclusivity. Through these efforts, the City reached over 200 people, and 69% of those who provided demographic information were people of color. Engagement themes included housing barriers, service needs, and location criteria for affordable housing investments.

Highlights from Beaverton's LIS include:

- Portfolio approach to achieve the unit production targets through four projects, including:
    - Mary Ann Apartments, which received a concept endorsement from Metro Council as a Phase 1 project on March 11, 2019;
    - Plans to partner with Metro on the development of the Metro owned Elmonica site at 170th and Baseline, to be facilitated through a joint developer solicitation process;
    - One site to be acquired by the City using bond funds, for development through a Request for Qualifications (RFQ) process; and
    - One project to be selected through an open Notice of Funding Availability (NOFA) process
- Creation of a Housing Technical Advisory Group to advise staff on investment decisions

- Requirements for project sponsors to make good faith efforts to achieve 20% subcontracting participation on the development hard and soft costs to COBID certified MWESBDVs
- Requirements that project developers/owners use low barrier screening and best practice affirmative marketing strategies
- Requirement that project developers/owners track the labor force demographic and hours worked by each apprentice

Washington County Local Implementation Strategy
Washington County is eligible for $116,465,532 in Metro bond funding to support eligible projects, and $2,451,906 in program administrative funds. The Housing Authority of Washington County (HAWC) will administer funding, with a focus on implementing funds in the balance of the county not covered by the other eligible implementation jurisdictions of Beaverton and Hillsboro. Disbursement of funds from Metro to the County will be based on demonstrated progress toward achieving the County's share of unit production targets, including a total of 814 total units, of which 334 must be deeply affordable to households making less than 30% of area median income (AMI) and 407 must be family size units (2 bedrooms or more).

Washington County staff engaged over 300 community members as well as individuals representing more than 50 agencies. Community members included people with low incomes, seniors, youth experiencing housing instability, people with physical or developmental disability, people with mental health or addiction concerns, people with limited English proficiency, immigrants and refugees, residents of low-income housing, service providers, veterans, and tribal community members. Engagement themes included housing barriers, service needs, location priorities, and affirmative marketing opportunities for affordable housing investments.

Highlights from Washington County's LIS include:
- Portfolio approach to developing approximately 13 projects, to be primarily developed by private/nonprofit developers selected through competitive RFP or NOFA processes, and including the Community Development Partners (CDP) apartment development at 72nd and Baylor in Tigard, which received a concept endorsement from Metro Council as a Phase 1 project on July 11, 2019;
- Goal to provide 100 permanent supportive housing (PSH) units by seeking opportunities to leverage existing county service resources and new statewide resources
- $25 million set-aside for Small Non-Profits and Community Housing Development Organizations (CHDO), who will have opportunities to propose projects outside of the NOFA/RFP process
- Threshold utilization goal of 15% for state certified COBID/MWESB firms, with an aspirational goal of 20%
- Commitment to work with WorkSystems and Metro to develop apprenticeship programs, as well as participation in Metro's Construction Careers Pathways Projects (C2P2)

- Requirements that project developers/owners use low barrier screening and best practice affirmative marketing strategies

BACKGROUND
In January 2019, Metro Council adopted the Housing Bond Program Work Plan, which identified seven local government partner agencies as eligible to participate in implementation of the housing bond, along with Metro. The Work Plan established requirements for eligible agencies to create community engagement informed local implementation strategies, informed by community engagement, that includes a development plan to achieve the unit production targets, a strategy for advancing racial equity, and ensuring community engagement in implementation.

Since the Work Plan was adopted, seven eligible local implementation partners have been working to conduct engagement and develop local implementation strategies. These include:

- City of Beaverton
- City of Gresham
- City of Hillsboro
- City of Portland
- Home Forward (the housing authority serving Multnomah County)
- Clackamas County
- Washington County

Metro is also developing an implementation strategy for its Site Acquisition program, which will administer a portion of funding focused on acquisition of regionally significant sites for affordable housing development in partnership with local implementation partners.

In January 2019, the Metro Council also established and appointed a Community Oversight Committee charged with evaluating implementation strategies and recommending changes as necessary to achieve unit production targets and incorporate guiding principles; monitoring financial aspects of program administration; and providing an annual report and presentation to Metro Council assessing Program performance, challenges and outcomes.

ATTACHMENTS
Metro Staff Evaluation of Beaverton LIS
Beaverton LIS
Metro Staff Evaluation of Washington County LIS
Washington County LIS

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

Attachment 1 to Staff Report

City of Beaverton Local Implementation Strategy
Metro Staff Evaluation Worksheet
July 17, 2019

LOCAL IMPLEMENTATION STRATEGY REQUIREMENT CHECKLIST

Meets requirements?		Local implementation strategy requirements	Metro Staff Notes
Committee member review	Staff review		
☐	√	Anticipated number, size, and range of project types (estimates are acceptable) and cost containment strategies to achieve local share of unit production targets (including 30% AMI and family-size unit goals and the cap on units at 61-80% AMI) using local share of eligible funding;	**Anticipated Project Types:** Portfolio approach to achieving the unit production targets, and monitoring and adjusting the LIS as needed using a tracking worksheet considering funds available and remaining goals to be achieved. (See p. 12). Exhibit 2 to the LIS provides initial portfolio modeling showing estimated/anticipated bond allocation and unit production across four projects (See p. 36). Beaverton is not considering investing Bond resources in homeownership strategies (See p. 18). **Cost Containment:** Beaverton will evaluate proposed projects to ensure that costs are reasonable and appropriate to the project, with a focus on bond funds needed rather than the total development costs of projects. Considerations will include: appropriate scale for target population and neighborhood, costs of mixed-use development, quality of construction materials, costs associated with anticipated service needs, and reasonable fees and reserves. The City acknowledges the need to achieve an average Metro bond expenditure per unit of $143,000, and states that additional local resources may be needed to achieve the production goals. According to Exhibit 2, the City estimates a deficit of $2.3 million to achieve the framework goals. (See pp. 19-20) **Distribution of Family-Sized Units:** The ratio of small and large (2+ bedroom) units will reflect the characteristics of the target population. (See p. 17) **Distribution of 30% AMI Units:** All projects are anticipated to include some units with rents at 30% AMI, and some projects may include higher concentrations of 30% AMI units as long as there is ongoing funding for supportive services. (See p. 17) **Strategy Review** Beaverton plans to take a portfolio approach, monitoring and adjusting the LIS (Exhibit 2) when appropriate. Because the pace of implementation is uncertain, these review points will not occur at specific points in time but instead will be based on the commitment of Bond resources to specific projects. (See p. 12)
☐	√	Consideration for how new bond program investments will complement existing regulated affordable housing supply and pipeline;	**Summary of existing need/supply:** Currently, the City of Beaverton has 876 regulated affordable housing units that are disbursed across the city. In 2016, the City of Beaverton contracted with Angelo Planning Group and Johnson Economics to complete a Housing Strategies Report, including anticipated housing needs. The study estimated a need for 2,663 affordable rental units, including 841 units at 30% AMI and below. The February 2019 "Tri-County Equitable Housing Strategy to Expand Supportive Housing for People Experiencing Chronic Homelessness" strategic plan identified a need for 226 PSH units in Washington County. The private rental housing market has concentrated on small unit sizes, a concern identified by many residents during listening sessions. (See pp. 3-4) **Pipeline:** While much of Beaverton's efforts during the implementation of the Housing Bond will be focused on moving the pipeline of Bond funded projects forward, the ongoing availability of other Federal and State affordable housing resources means that there is a likelihood other projects may move forward during the same timeframe. Beaverton will monitor the pipeline of projects proposed and funded in Beaverton and will collaborate with developers to identify the most appropriate funding packages and other

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			support that can be allocated to those projects. (See pp. 16-17) Beaverton seeks to align Housing Bond implementation with the city's other local affordable housing activities, including working with property owners to identify ways to improve housing stock while avoiding forced displacement of tenants, collaborating with market rate developers to include restricted units in their development, working with homebuilders to increase affordable homeownership stock and providing down-payment assistance for additional homeownership opportunities. (See p. 18)
☐	√	Goals and/or initial commitments for leveraging additional capital and ongoing operating and/or service funding necessary to achieve the local share of Unit Production Targets;	**Leveraged funding:** The LIS describes leveraging "principles" including maximizing the use of non-competitive and private resources, maximizing local resources, and seeking federal/state/county resources. Washington County Housing Services has committed 33 project-based Section 8 rental assistance vouchers to support Beaverton Bond projects. (See pp. 16-17). Based on existing estimates in Exhibit 2, the City estimates a deficit of $2.3 million to achieve unit production goals, and states that local resources may need to be committed to fill this gap. (See p. 20) **Leveraged services:** Beaverton will work with regional and state partners to identify a consistent funding source to serve vulnerable homeless or at risk populations. (See p. 17)
☐	√	Strategy for aligning resident or supportive services with housing investments, including [optional] any local goals or commitments related to permanent supportive housing; and	**Supportive Services:** Beaverton strives to work with the County and other public partners to identify opportunities to include PSH units within the 89 deeply affordable units the City will fund. (See p. 4) Projects serving high needs populations will require robust supportive services to ensure resident stability and positive outcomes. While Beaverton is not a significant provider or funder of supportive services, it is available, in partnership with Washington County, to help connect developer/owners to public and private service providers in the community to create needed partnerships. Beaverton will evaluate each project's target population and service plan to ensure that it is appropriate and durable. (See p. 19) **Resident Services:** Beaverton will require resident service coordination to be provided at all projects, appropriate to the level of need of the target population. Resident Services will focus on eviction prevention, helping residents access mainstream services for which they may be eligible, and community building activities. (See p. 19)
☐	√	Description of project selection process(es) and prioritization criteria, including anticipated timing of competitive project solicitations and how existing or new governing or advisory bodies will be involved in decisions regarding project selection.	**Project selection process:** Beaverton does not intend to be a developer or owner of housing funded under the bond. The City plans to select four projects through a process that will include public and open solicitations. Every solicitation document will include a set of expectations for all developers/owners to ensure selected projects achieve both the framework goals and racial equity outcomes. These will include a joint RFP with Metro for the Metro-owned Elmonica site, a second RFP or RFQ for a yet-to-be-determined site, and one project to be selected through a NOFA process specifically targeting developer proposed sites with little or no affordable housing and emerging areas near good schools. (See p. 13) **Prioritization criteria for site acquisition:** The City is exploring other possible City-owned sites for Housing Bond projects. Based on community feedback, the City plans to consider the following factors in site selection: • Beneficial leverage of free or discounted land • High opportunity areas, as defined by access to good transit, good schools, services and other amenities • Opportunities to meet community development goals or develop beneficial service partnerships, and/or • Opportunities to use 4% LIHTC resources (See pp. 14-15)

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			Prioritization criteria for projects:
			The LIS describes the following project selection criteria:
			• Contribution to Metro unit production targets
			• Furthering Beaverton's Affordable Housing Goals, including:
			  ○ Geographic goals – supporting projects in opportunity neighborhoods (good access to transportation, commercial services, amenities; creating inclusive mixed-income neighborhoods). This includes the emerging downtown, recently annexed areas, and areas where private/public investment is being made to improve livability. Beaverton will seek to disperse units throughout the city.
			  ○ Target population goals – Serving as many needs as possible, including needs identified during community listening sessions, including senior housing, family housing (including 3-4 bedroom units), housing that is ADA compliant, and housing for individuals exiting foster care.
			• Racial equity, including
			  ○ increasing housing in areas with underserved diverse populations, particularly in areas with displacement risk
			  ○ providing new affordable housing in high opportunity areas
			  ○ Supporting project teams with proven track record of successful participation of minority and women owned contractors in pre-development and construction as well as ongoing maintenance
			  ○ Engaging targeted or historically marginalized communities and communities of color as part of the leasing process
			  ○ Creasing an inclusive tenant screening criteria process minimizing barriers to housing experienced by communities of color
			  ○ Providing culturally specific resources and services
			• Connection to resident services and appropriate supportive services as needed to ensure resident stability and positive outcomes
			• Project Cost/Leveraging funds
			• Capacity/readiness to proceed
			(See pp. 17-20)
			
			Anticipated timing of competitive solicitations:
			The LIS does not currently include an anticipated timeline for competitive solicitations.
			
			Project selection process and role of governing/advisory bodies:
			The City of Beaverton is in the process of creating a Housing Technical Advisory Group to provide feedback to staff and advise the Mayor on affordable housing related matters, including Housing Bond projects. Efforts will be made to ensure gender/ethnic diversity as well as industry and end-user experience. The City's Real Estate Committee is an internal committee advisory to the Mayor and charged with reviewing city real estate investments. The REC will review proposed projects prior to staff presenting them to the Mayor and subsequently City Council. (See p. 13)

☐	√	Location strategy that considers geographic distribution of housing investments, access to opportunity, strategies to address racial segregation, and strategies to prevent displacement and stabilize communities;	**Geographic Goals** Beaverton desires to support projects in opportunity neighborhood that have good access to transportation, community amenities, and provide the opportunity to create inclusive mixed-income amenities. Beaverton will seek to disperse units throughout the city, where these locational attributes meet. The City will work with property owners to identify ways to improve the housing stock while avoiding forced displacement of tenants, collaborating with market rate developers to include affordable/restricted units in their development, working with homebuilders to increase affordable homeownership stock, and providing down-payment assistance for additional affordable home ownership opportunities. (See p. 18) **Strategy** Every solicitation document will include a set of expectations for all developers/owners to ensure selected projects achieve both the framework goals and racial equity outcomes. These requirements include a 60-year affordability covenant, inclusion of minority and women owned contractor participation in the development process, and the use of best practice outreach and tenant selection criteria. (See p. 13)

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			The City will prioritize sites if they support the Implementation Strategy goals and are consistent with feedback from a Housing Technical Advisory Group (HTAG) as well as the City's Real Estate Committee (REC). The City will take into consideration: ▪ The beneficial leverage of free or discounted land; ▪ High opportunity areas, these areas are defined by with access to good transit, good schools, services, and other amenities ▪ Opportunities to meet community development goals or develop beneficial service partnerships; and/or ▪ Opportunities to use 4% LIHTC resources (See p. 14-15)
☐	√	Fair housing strategies and/or policies to eliminate barriers in accessing housing for communities of color and other historically marginalized communities, including people with low incomes, seniors and people with disabilities, people with limited English proficiency, immigrants and refugees, and people who have experienced or are experiencing housing instability;	**Affirmative Marketing, Tenant Selection & Lease-Up.** Beaverton will require that project developers/owners make best faith efforts to make units available to minorities and disadvantaged populations using best practice strategies. In general, this will require: ▪ Affirmative outreach and marketing to target populations. Developers/owners, and their property management companies (if applicable) will be expected to engage in pro-active efforts to make disadvantaged populations aware of the availability of units, and the process and timeline for application. Beaverton will work with project sponsors to identify specific target populations for each project and will review the proposed outreach and marketing strategy for each project. ▪ Beaverton will require that project sponsors use low barrier screening criteria that balances access to target populations, project operations, and community stability. Typical requirements may include less than standard market apartment income-to-rent ratios, reduced credit history requirements, and criminal history requirements that only consider recent convictions that are most directly tied to tenant success. Project sponsors will be required to review appeals to denials of standard screening criteria that take into consideration efforts of applicants that demonstrate stability and potential for tenant success. Project sponsors are also required to review appeals if the disqualifying aspects of a denial are related to a disability and make reasonable accommodations as appropriate. (See p. 23)
☐	√	Strategies and/or policies, such as goals or competitive criteria related to diversity in contracting or hiring practices, to increase economic opportunities for people of color;	**MWESB Contracting** Bond project sponsors will be required to make good faith efforts to achieve 20% subcontracting participation on the development hard and soft costs to COBID certified MWESBDVs. Specific NOFAs, RFQs or RFPs may have additional goals or requirements. Those responding to Bond offerings will be required to provide documentation of how they intend to meet COBID subcontracting effort requirements, and successful awardees will be required to report their ongoing project participation to the City. In order to reach these goals, the City hopes to assist contractors make connections with agencies who work with the promoting, hiring and development of MWESB-DVs. The City has been proactive in meeting with Trade Associations and attending events to promote upcoming Bond projects in the region. **Workforce and Apprenticeship Participation.** Beaverton is interested in understanding the labor force make-up of each project and encouraging the utilization of apprenticeship programs. The City will track the labor force demographic and hours worked by each apprentice. While specific programs to further this goal are not developed at the time of writing the LIS, staff has engaged in conversation and outreach to pre-apprenticeship programs such as Oregon Tradeswomen, Constructing Hope and Portland Opportunities Industrialization Center. The city will also engage Metro, other implementing jurisdictions, and project sponsors to explore ways to maximize apprenticeship participation. (See p. 22-23)
☐	√	Requirements or competitive criteria for projects to align culturally specific programming and	**Project selection consideration** Beaverton will take into consideration the following factors: Supporting project teams that have a proven track record of:

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		supportive services to meet the needs of tenants.	▪ Outreach, engagement, and ensuring participation of minority and women owned contractors in pre-development and construction of the project, as well as the on-going maintenance of the building; ▪ Engaging targeted and/or marginalized communities, communities of color as part of its leasing process; ▪ Creating an inclusive tenant screening criteria process, minimizing barriers to housing experience by communities of color; ▪ Providing culturally specific resources and services. Beaverton recognizes that culturally specific programs can achieve strong outcomes for diverse groups in the community Beaverton will prioritize projects addressing the historical racism and lack of housing access experienced by communities of color, whether that is represented by projects sponsored by culturally specific organizations, or projects sponsored by partnerships in which culturally specific organizations have a meaningful role in project design and operations, or sponsors provide sufficient proof of their ability to connect with communities of color. Beaverton expects that Resident Service Coordination will be provided at all projects, appropriate to the level of need of the target population. Resident Services will focus on eviction prevention, helping residents' access mainstream services for which they may be eligible, and community building activities (See p. 19)
☐	√	Engagement activities focused on reaching communities of color and other historically marginalized communities, including people with low incomes, seniors and people with disabilities, people with limited English proficiency, immigrants and refugees, and people who have experienced or are experiencing housing instability;	**Engagement Summary and Outcomes** Events were hosted in trauma informed spaces and environments to ensure inclusivity. The City of Beaverton also partnered with Washington County and the City of Hillsboro to supplement findings and extend resources for engagement and outreach that resulted in hearing 451 community members and over 100 agencies (See Exhibit 1). The City of Beaverton has established boards and commissions (40% of members self-identify as a person of color) that provide input and feedback in city related activities and initiatives. Staff made presentations to and sought input from the Beaverton Committee for Community Involvement (BCCI), Human Rights Advisory Committee (HRAC), Beaverton Committee on Aging, and the Diversity Advisory Board (DAB). To engage the community at large, over 80 community members attended a widely publicized listening session. This listening session included city board and commission members who acted as volunteer facilitators during breakout sessions. At this session, attendees were able to vote electronically after discussing the six listening session questions in small groups to provide live input to staff throughout. At all Beaverton events interpretation/bilingual facilitators was available and actively utilized, childcare was provided, and refreshments were available. Events also utilized live polling to capture in-depth feedback. To make engagement opportunities inclusive and accessible events and presentations were conducted in a variety of locations, languages, and times. Every effort was made to approach all community engagement activities through a lens of equity and inclusion, with special attention paid to reaching historically underrepresented groups. Efforts were made to reach low income community members, people of color, people with limited English proficiency, immigrant and refugees, senior residents and people who have experienced housing instability by hosting targeted opportunities directed towards the Arabic community, Latino parents in the Beaverton School District, and Habitat for Humanity clients and by attending meetings for groups and organizations representing these communities. Through opportunities detailed above, the City of Beaverton was able to hear feedback from **over 200 people**. 69% percent of those who attended feedback events were people of color, where demographic information was provided. Demographic information was collected at events in table marked with an asterisk. This included 8 presentations, events, and meetings. (See pp. 25-26 and 31)

Attachment 1 to Staff Report

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☐	√	Summary of key community engagement themes related to local housing needs and priority outcomes for new affordable housing investments, approach to geographic distribution and location strategies, acknowledgement of historic/current inequitable access to affordable housing and opportunities for stakeholders to identify specific barriers to access, and opportunities to advance racial equity through new investments;	5 categories were identified in City of Beaverton Specific Events Engagement Results: barriers, service needs and location. **Barriers** • Cost (56%) • Screening Criteria (12%) • Navigation (13%) **Service needs** • Education (42%) • Service Alignment (46%) • Addictions/Mental Health or other Case Management (8%) **Location** • Services (29%) • Safe/Sense of community (48%) • Transit (17%) (See p. 35-36 for full summary of detail within each category) In the widely publicized listening session, the key take-away from this event included a need to having access to affordable/stable housing, and the challenge of income not keeping up with housing costs/rent increases (See p. 6). Key comments from of three listening sessions with Habitat for Humanity clients, Arabic-speaking event and Latino Family Night was the need for family size housing, including a larger number of 3 and 4 bedroom units, and proximity to good school and other amenities. (See p. 7)
☐	√	Summary of how the above themes are reflected in the Local Implementation Strategy.	**Local Implementation Strategy Goals** ▪ Geographic Goals –During listening sessions and the feedback phase, requests were made for housing with access to schools and amenities. These areas include the emerging downtown, recently annexed areas, and areas where private/public investment is being made to improve the livability of the area. (Location) ▪ Target Population Goals – During the Listening phase, the city received reminders of the need for senior housing, family housing (to include three and four-bedroom units), housing accessible to high needs populations, housing that is compliant with the American with Disabilities Act (ADA), and housing for individuals exiting the foster care system. Due to limited resources and the small number of projects to be funded under the bond, addressing all these needs will not be feasible, but the city will strive to assist as many of these needs as possible. (Target Population) (See p. 18) ▪ Increasing affordable housing in areas with existing underserved diverse populations, especially in areas that may be subject to displacement (Barriers). ▪ Providing new affordable housing in high opportunity neighborhoods and sites. This would include sites that have good access to transit, jobs, quality schools, commercial services, parks & open space, etc. (Location) ▪ Supporting project teams that have a proven track record of: o Engaging targeted and/or marginalized communities, communities of color as part of its leasing process (Barriers); o Creating an inclusive tenant screening criteria process, minimizing barriers to housing experience by communities of color (Barriers); o Providing culturally specific resources and services. Beaverton recognizes that culturally specific programs can achieve strong outcomes for diverse groups in the community (Service needs). (See p. 20)

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☐	√	Strategies for ensuring that ongoing engagement around project implementation reaches communities of color and other historically marginalized community members, including: people with low incomes, seniors and people with disabilities, people with limited English proficiency, immigrants and refugees, existing tenants in acquired buildings, and people who have experienced or are experiencing housing instability; and	Community engagement opportunities will be organized to allow people to engage across a spectrum of interest levels: • **Inform Community Members**: Some community members will be interested in hearing the highlights about the Local Implementation Strategy for the bond; others will continue to track the process and stay up to date on the latest project news. Staff will use multiple methods of outreach to inform community members about the bond implementation process and major project milestones to ensure community members stay informed. Staff will provide information to assist the public in understanding the decisions made throughout the planning process and implementation information will be made broadly accessible through multiple means, channels, and sources. • **Consult Community Members**: Some community members will want to make sure the process and outcomes of the LIS broadly address the topics they are interested in. These individuals may desire to weigh in and provide feedback at key points in the process and have their voice be heard. Opportunities for such feedback will be provided via open houses, housing forums, City Council meetings. • **Involve Community Members**: Some community members, such as the Housing Technical Advisory Group (HTAG), relevant Beaverton Boards & Commissions, and other community groups will want to contribute concerns and directed advice throughout bond implementation on a long-term basis. Staff will engage these groups with timely and direct answers to questions, regular updates, and sit-down meetings when possible to discuss the feedback in greater depth. These groups may also act as "champions" of affordable housing and voice their support throughout project selection and development. (See p. 25-26) **Outreach recommendations from City of Beaverton Community Engagement** Use the following media outlets: ▪ Internet ▪ Word of Mouth ▪ Leveraging Partner Organizations ▪ Utilizing Community Locations ▪ Cellphone Based ▪ Creating Database of housing for renters and landlords ▪ Print Media The internet, using word of mouth outreach through community leaders and networks, leveraging partner organizations, and utilizing well-known community-specific locations (i.e. library, places of worship, etc.) were the main recommendations. However, several people noted that internet access is limited; necessitating continued and expanded print marketing to ensure affordable housing outreach is accessible to all. One idea that came out of this conversation was the need to create a "brand," so the community would know the availability of housing notice is from a trusted source. (See p. 34) Additionally, the City of Beaverton's approach to racial equity in project selection will take into consideration supporting project teams that have a proven track record of engaging targeted and/or marginalized community, communities of color as part of its leasing process. (See p. 20)
☐	√	Strategy for ensuring community engagement to shape project outcomes to support the success of future residents.	**Organizational Plan** In-house staff will be responsible for community engagement and outreach, project selection process, project documentation and funding processes, as well as overall program monitoring and reporting. In addition to the city's General Fund dollars supporting the housing staffing necessary to implement the bond, Metro has also committed $655,591 over five years to augment Beaverton's staffing plan for bond implementation. Initially, Beaverton anticipates these funds will support the addition of one full time equivalent position for community engagement, racial equity work, and monitoring restricted covenants via regulatory compliance agreements. City Council approved this new position effective April 1, 2019. (See p. 12)

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			The City of Beaverton is in the process of creating a Housing Technical Advisory Group (HTAG), which will provide feedback to staff and advise the Mayor on affordable housing related manners, including Housing Bond projects. Like many other City of Beaverton advisory groups, every attempt will be made to ensure gender/ethnic diversity as well as industry and end-user expertise. (See p. 13)

Attachment 2 to Staff Report

Affordable Housing Bond

Beaverton Local Implementation Strategy

Beaverton
OREGON

Affordable Housing Bond
Beaverton Local Implementation Strategy

I. Introduction

The City of Beaverton thrives as an ethnically diverse, welcoming city, where all its residents are an essential part of the Beaverton community. As stated by Mayor Denny Doyle in his 2019 State of the City address, "We are a community that cares for every person who calls our region home. We continue to make diversity, equity and inclusion a priority." People want to be part of this community because of the quality of life and diversity we enjoy, but many existing residents increasingly struggle to remain in Beaverton.

This Local Implementation Strategy (LIS) aims to sustain Beaverton's livability, particularly for those most in need. It will guide the city's efforts as it works to create affordable housing using the Metro Affordable Housing Bond. Beaverton is pleased to be an implementing jurisdiction of this program as these resources will play a critical role in meeting a range of important housing needs in the community, ensuring the livability discussed above. The City will strive to deploy resources and help housing projects develop expeditiously in order to minimize inflationary pressures and receive additional funding from the program should resources be available.

Principles of Autonomy & Collaboration

Three jurisdictions in Washington County will participate in implementation of the Metro Affordable Housing Bond—Washington County, the City of Hillsboro and the City of Beaverton. While each will have a separate LIS, the jurisdictions have agreed to several principles and practices with respect to the development and operation of their strategies.

- First, the three jurisdictions have agreed to share both the bond resources and the goals established for Washington County as a whole, based on the share of bond revenue generated by each of the three jurisdictions.
- Second, each jurisdiction will have autonomy in project selection, commitment of bond resources, and oversight of bond-funded projects. The jurisdictions may choose to collaborate on specific projects that will serve their individual as well as collective community needs. This may result in actual expenditure of bond proceeds across the three jurisdictions in a different blend than envisioned at the outset.
- Third, recognizing that many community partners serve the larger Washington County area, and that many residents perceive that their needs could be met without respect to jurisdictional boundaries, the three implementing jurisdictions will collaborate on community engagement efforts and on developing the partnerships that will help to ensure the success of all bond projects throughout Washington County.

Beaverton Housing Needs

Currently, Beaverton has 876 regulated affordable housing units that are disbursed across the city based on lists compiled by Metro, the City of Beaverton, Washington

County, and Oregon Housing and Community Services. Juxtaposed with the need for regulated affordable housing in Beaverton highlights a severe shortage within our community. In 2015, the City of Beaverton contracted with Angelo Planning Group and Johnson Economics to complete a Housing Strategies Report. Among other things, this report looked at demographic trends, associated housing needs, and a determination of land needs for housing over the next 20 years. The table below represents Beaverton's estimated rental housing needs over a 20-year period starting with 2016:

Total rental housing needed	4,672
Total affordable rental housing needed	2,663
Total 30% AMI (Area Median Income) rental housing needed	841
Total 60% AMI rental housing needed	1,028
Total 80% AMI rental housing needed	794

Available Resources and Framework Targets

Beaverton's Local Implementation Strategy focuses on the needs of city residents based on feedback from an in-depth community engagement process and Metro's Affordable Housing Bond Program Work Plan (Work Plan) approved by Metro Council on January 31, 2019.

The Metro Work Plan illustrates how the regional goal of creating 3,900 restricted affordable units (1,600 of which are to be available to households earning 30% or less of the Area Median Income (AMI), and 1,950 housing units which are to have two or more bedrooms) is distributed between implementing jurisdictions. From the region, **$31,140,595** in bond proceeds is dedicated to Beaverton. The overall goal for Beaverton is to support at least **218 units of affordable housing** within the city. These may be newly built units or existing units at risk of rapidly rising rents. While affordable homeownership is an option for bond resources, the city expects to invest its portion of bond proceeds in rental housing.

Recognizing Beaverton's lowest income neighbors have the greatest challenges in securing affordable housing, and consistent with the Work Plan, Beaverton has set a goal that at least **89** of the 218 units will be affordable for households with income at or below 30% AMI. These units may serve people with special needs, people who earn low wages, or live on fixed incomes. As least **35** of these deeply affordable units will be supported with rental assistance provided by the Housing Authority of Washington County, targeting the most fragile households.

The "Tri-County Equitable Housing Strategy to Expand Supportive Housing for People Experiencing Chronic Homelessness" is a strategic plan prepared in February 2019 by the Corporation for Supportive Housing and Context in Action to provide recommendations for Clackamas, Multnomah and Washington Counties to reduce chronic or long-term homelessness for people with complex health conditions.

The plan identified a need for 226 Permanent Supported Housing units (PSH) in Washington County. PSH is an intervention for chronic homelessness, aligning deeply affordable housing with effective delivery of supportive services. The City of Beaverton strives to work with the County and other public partners to identify opportunities to include PSH units within the 89 deeply affordable units the city will fund.

An on-going funding source for services is critically important to make PSH units sustainable. If funding is made available, Beaverton will work with developers, social service agencies, Washington County, and other community partners to link supportive services to the affordable housing to ensure that residents are stable and secure.

Beaverton may explore options to include units with rents appropriate for households with incomes from 61% to 80% AMI (Low Income as defined by HUD). The need for affordable housing crosses income levels and serving higher income households can create cross subsidization for very low-income households. No more than **22** Bond-financed units will have rents at this level.

The need for rental housing crosses a range of household sizes. The private rental housing market has concentrated on small unit sizes – typically studios and one-bedroom apartments. This is also a concern voiced by Beaverton community members in many listening sessions throughout our community engagement process. This mismatch between need and available units is especially difficult for lower-income households. As a result, the Metro Bond Framework set a goal that half the units developed under the bond program must include two or more bedrooms. For Beaverton, this means that at least **109** units will include two or more bedrooms.

Advancing Racial Equity

The City of Beaverton prioritizes advancing racial equity for all its activities. The Diversity Advisory Board and Human Rights Advisory Commission inform the city's activities and advance equity through their effort and input. This is an ongoing priority of elected leadership to mitigate decades of government policy from the federal to local level that contributed to disparate outcomes for communities of color. People of color struggle disproportionately with unaffordable housing, displacement and homelessness. The implementation of the Affordable Housing Bond provides an opportunity to work to address this inequity and to meet the needs of historically marginalized communities.

Efforts and opportunities to address racial equity occur at many points in the implementation of the Affordable Housing Bond. Opportunities to advance racial equity include community engagement to plan development, project selection, and inclusion of minority businesses and workforce in the design and construction of housing with a 20% subcontracting goal of development hard and soft costs to certified minority, women, emerging and disabled veteran-owned businesses.

To ensure we are successful in meeting this goal, staff invested significant time towards meeting with minority owned subcontracting businesses and trade associations to discuss the barriers to participation and to determine solutions and steps the city can

take to overcome these barriers. Beyond this, staff formed culturally specific partnerships for outreach and services, and will continue to focus on accessible tenant selection/screening criteria processes, contracting opportunities post construction, and ongoing reporting of outcomes. The specific implementation strategies Beaverton will employ are discussed in the various sections below.

II. Strategy Development

Meaningful community engagement, especially with communities of color and marginalized communities, is the cornerstone of the LIS development. Washington County, Hillsboro, and Beaverton jointly developed an outreach plan that focused on regional and local nonprofit partners. In developing this outreach plan, equal focus was placed on reaching non-housing organizations and their constituents as housing-related service providers. To be consistent with the outreach and the information being gathered, the plan included six question asked consistently throughout this process. As of April 30, 2019, the collaborative work of the three jurisdictions resulted in hearing from 451 community members and over 100 agencies, which represented an array of communities and interests, see Outreach Report (Exhibit 1). Efforts were made to reach low-income community members, people of color, people with limited English proficiency, immigrants and refugees, senior residents and people who have experienced housing instability. The City of Beaverton divided its outreach into two phases – Listening and Feedback.

Listening Phase

The City of Beaverton has established boards and commissions that provide input and feedback on city related activities and initiatives. 40% of the city's board and commission members self-identify as a person of color. Due to the importance the city's boards and commissions have in civic engagement, it was imperative to seek input with relevant boards and commissions as part of the LIS development. Staff made presentations to and sought input from the Beaverton Committee for Community Involvement (BCCI), Human Rights Advisory Commission (HRAC), Beaverton Committee on Aging, and the Diversity Advisory Board (DAB). Some members shared personal experiences on access to housing, affordability, discrimination, displacement, etc.

To engage the community at large, over 80 community members attended a widely publicized listening session. This listening session included city board and commission members who acted as volunteer facilitators during breakout sessions. At this session, attendees were able to vote electronically after discussing the six listening session questions in small groups to provide live input to staff throughout. Some of the key take-away from this event included a need to having access to affordable/stable housing, and the challenge of income not keeping up with housing costs/rent increases.

Included in the Outreach Report are summaries of three listening sessions that exemplify the city's community engagement efforts with underrepresented communities. These include a conversation with Habitat for Humanity constituents, an Arabic-speaking community conversation, and participation in a Latino Family Night. Attendees at

these sessions came from a wide variety of backgrounds and represented a diverse cross-section of the Beaverton population. Members of the Beaverton Iraqi community led the Arabic-language session, which allowed for more nuanced input than simultaneous interpretation. Beaverton High School's Latino Family Night invited staff to share information and hear from parents about their housing challenges. Common comments from these sessions were the need for family size housing, including a larger number of 3 and 4-bedroom units, and proximity to good schools and other amenities. At one of the sessions, one attendee said, "it's sometimes easier to get a job than it is to get housing".

Listening sessions included conversations with developers (for profit and nonprofit), general contractors, minority subcontractors and minority small business advocates. Due to limited past participation of developers in creating affordable housing in Beaverton, the conversations with developers focused on opportunities, challenges, and invitations to participate in creating quality affordable housing for the city's most in need. Conversations with contractors focused on potential cost containment and efficiencies. The conversation with minority contractor advocates represented the first step in establishing a system to connect minority subcontractors to city-funded projects, beyond city procurement. Because there are multiple contracting opportunities once an affordable housing project comes online, outreach to minority small business advocates focuses on connecting minority small businesses with property owners/property management companies for contracting opportunities.

Public Review Draft Feedback

The LIS was drafted using the Work Plan and information received through the listening and feedback phase as guides. Staff presented the draft to City Council for feedback on May 7, 2019. Thereafter, the LIS draft was available for community feedback on the city's website, as well as comments from Metro staff, members of the Metro Housing Bond Oversight Committee, and community groups engaged in the Listening phase, and trade associations interested in increasing minority and women participation in housing development projects.

Community Feedback

During the feedback sessions, staff took the opportunity to further engage community participants by asking the following three targeted questions:

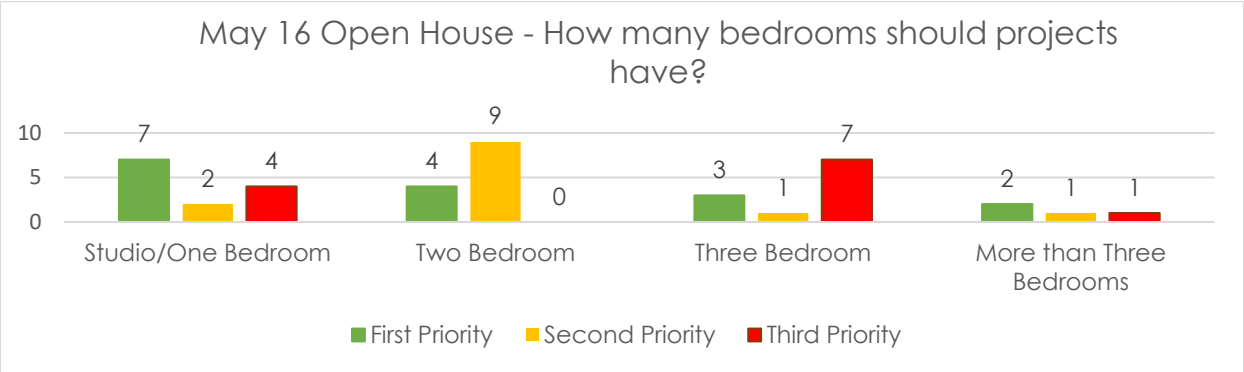
- Given the location and the need, what would you prioritize for the 60 to 80 units at the Elmonica site? (Choices listed were people experiencing homelessness, Veteran housing, senior housing, intergenerational housing, and three bedroom/family housing)
- What type of housing units do you think Beaverton has the greatest need for? (Choices listed were studio/one bedroom, two-bedroom, and three-bedroom units)
- How would you prioritize allocating deeply affordable units, knowing the need and services required are greater than available resources? (Choices listed were

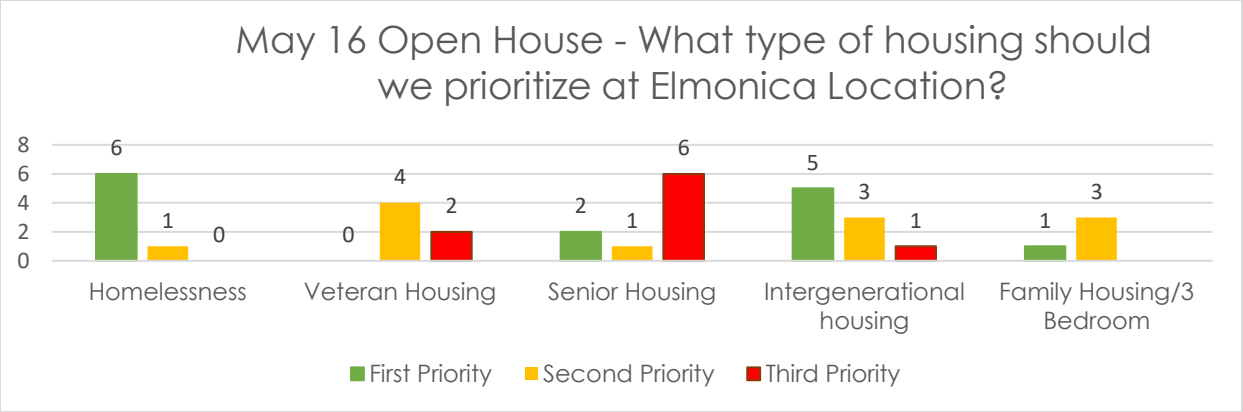
working households, Social Security households/fixed income, mental health/addictions stabilization and/or people experiencing homelessness)

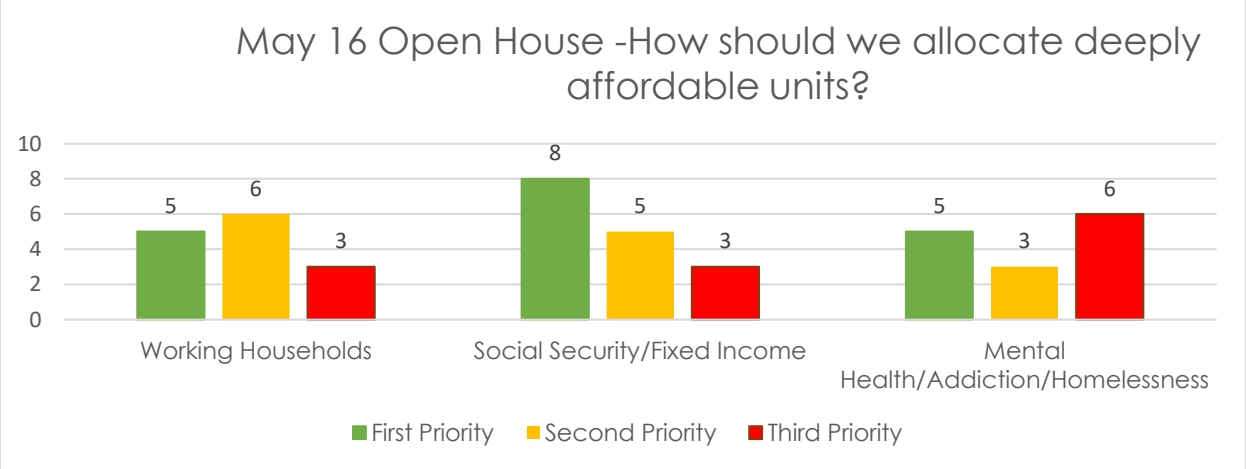
The City of Beaverton hosted an Open House for residents on May 16, 2019, a follow-up session with the Arabic community using trusted facilitators, and a follow-up presentation in Spanish at the Beaverton School District Latino Night. The open house and feedback sessions were an opportunity for community members to learn more about the LIS and provide their feedback on previously mentioned questions. 33 people attended the Open House, 18 adults participated in the Beaverton School District Latino Night, and 23 adults attended the Arabic Night follow-up session.

To answer the questions above, community members walked around the room with a sequence of posters designed to provide education and insight into these difficult decisions. We asked community members to vote with stickers in different colors (green for highest priority and red for lowest priority) to indicate how they would prioritize different unit types and services on three different posters. Staff were available to answer questions and feedback sheets were available for community members with more detailed comments. The same posters (translated into Spanish and Arabic) were used in follow-up sessions at the Beaverton School District Latino Night with Spanish speaking staff and for the Arabic community with staff and Arabic facilitators, who also recruited participants for the event to build trust.

May 16 Open House Results:

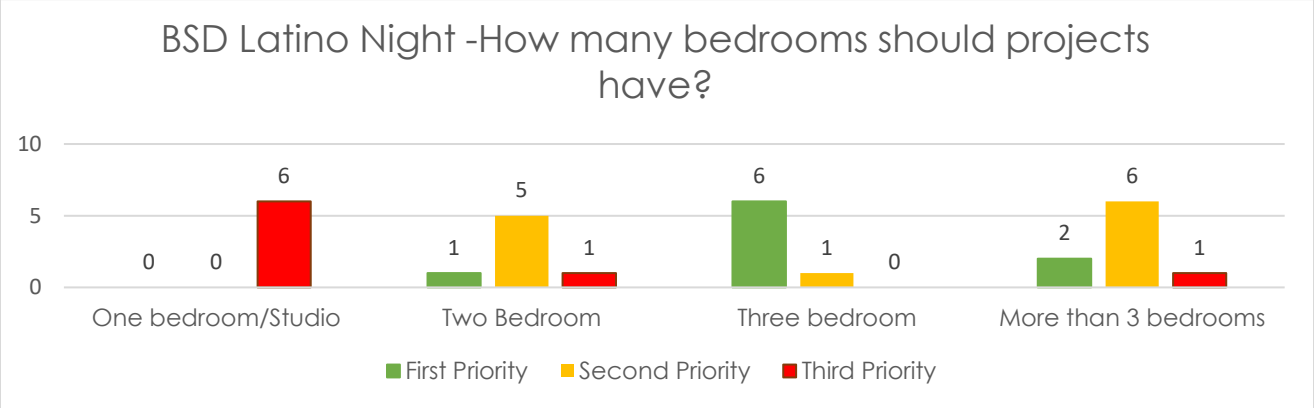


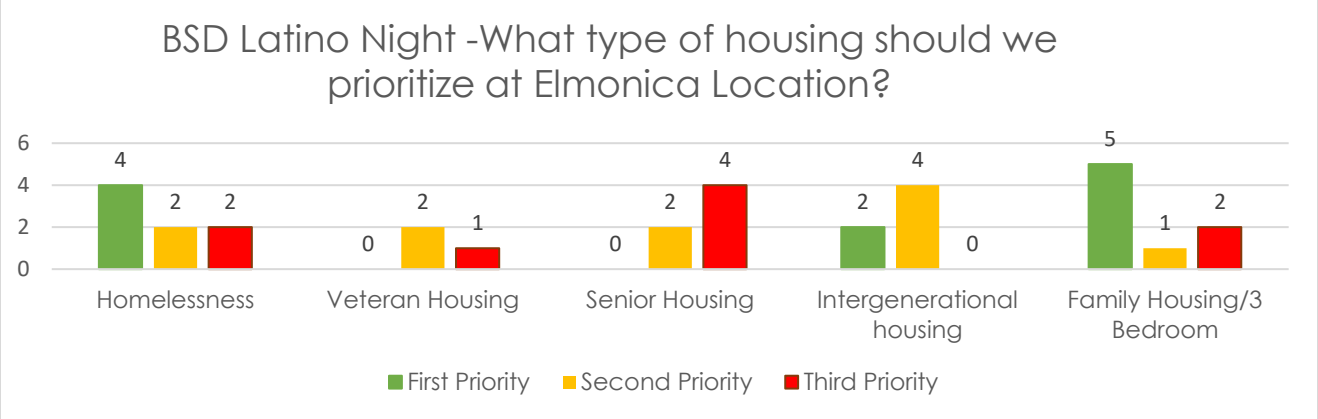


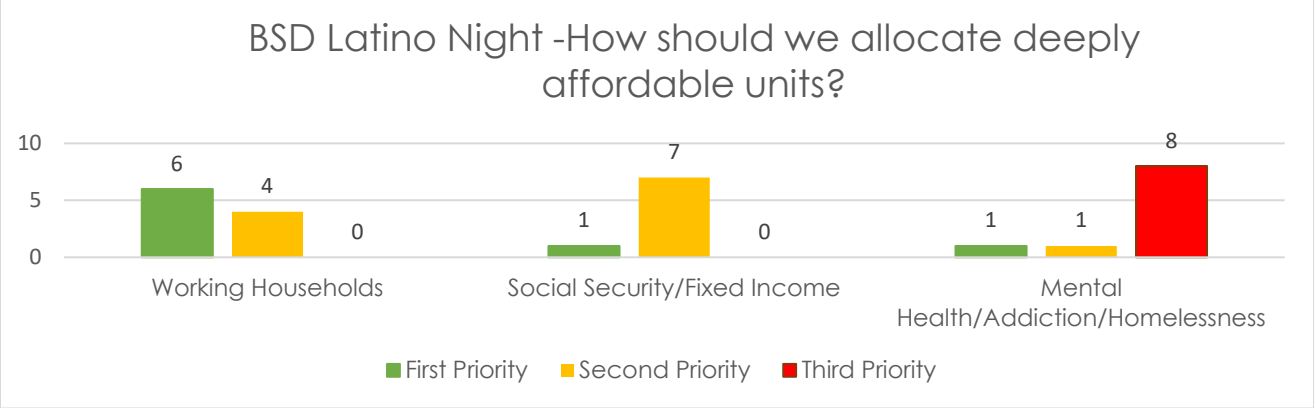


Other comments from the event included the need for separate housing for people experiencing homelessness, the need for family housing with nearby amenities and the need for pet friendly housing.

Beaverton School District Latino Night Results:

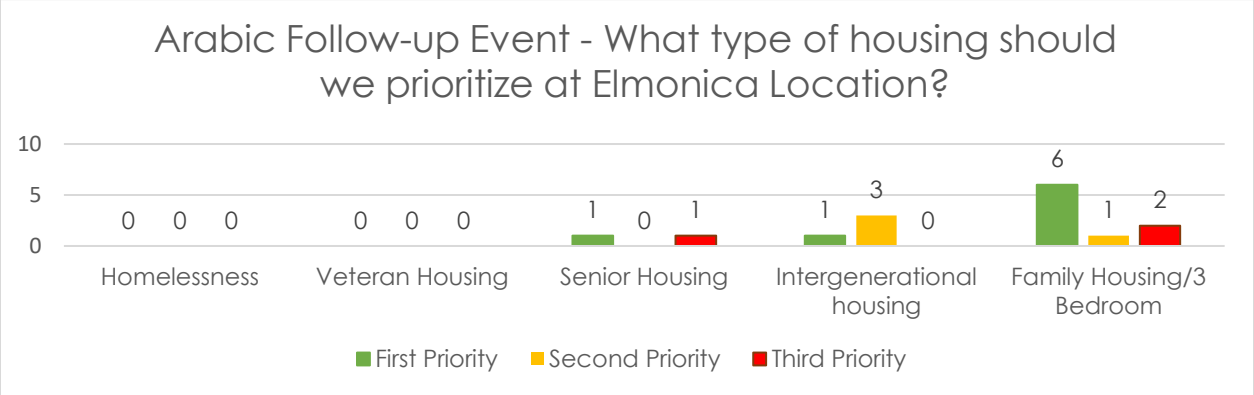


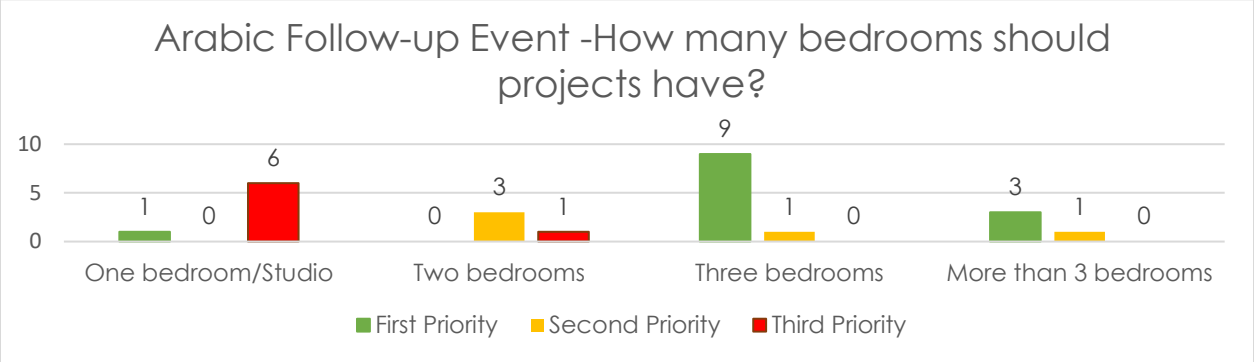


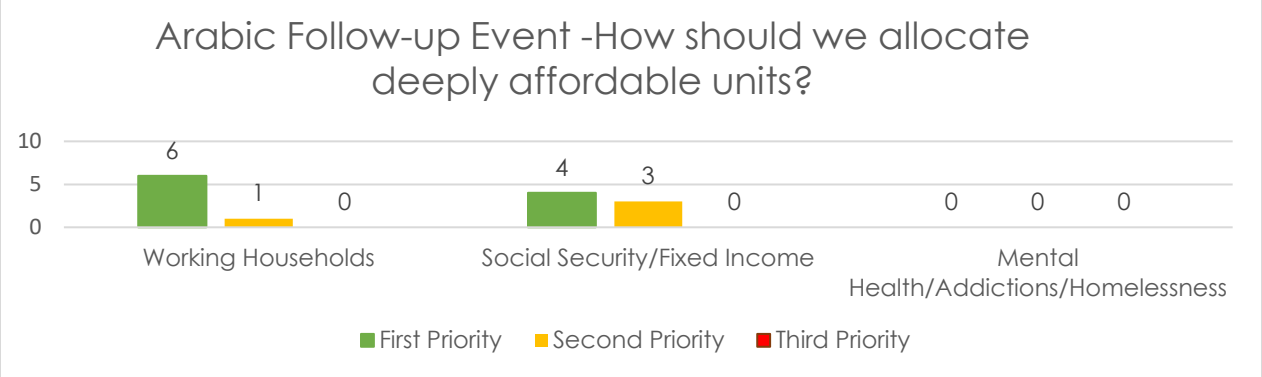


Overwhelmingly, attendees identified the need for three bedroom/family housing.

Arabic Community Follow-up Results:







Similar to the Beaverton School District event, attendees of the Arabic Community event stressed the need for three bedroom/family housing at the Elmonica site and beyond.

Trade Association Feedback

Like the community engagement process, outreach to MWESB-DV Trade Associations (COBID Registered) and pre-apprenticeship programs is ongoing. Beaverton desires to ensure contracting and employment opportunities are available to women and minority contractors. Therefore, the city is developing partnerships with agencies that can provide guidance its development partners on how to achieve established goals and connect their members to contracting opportunities. To that end, staff met with representatives of the Portland Development Business Group (PDBG), LatinoBuilt, Oregon Association of Minority Entrepreneurs (OAME), Oregon Tradeswomen, Portland's Opportunities Industrialization Center (POIC) and Constructing Hope. The city discussed upcoming opportunities created by the Metro Bond and asked for feedback. The following information was shared with staff:

- Hurdles MWESB-DVs would encounter in providing successful low bids and ideas on overcoming these hurdles
- Difficulty in developing trust with General Contractors (GC)
- Pitfalls of cold calling from the COBID registry list
- Hosting traditionally unsuccessful meet and greet events
- The need for assuring accountability from developers and GCs
- Journeyman to apprentice ratios given the ongoing construction boom in the area
- Lack of developer partnerships with MWESB-DV GCs
- Language Barriers
- Non-COBID registered small businesses
- Lastly, an overall experience of agencies/companies relying on known contractors and previous relationships

Local Implementation Strategy Approval

The community engagement detailed above led to this final LIS draft, which is scheduled to be reviewed by the Metro Housing Bond Oversight Committee on July 26, 2019, and subsequently by Metro Council. It will also be considered and approved by the Beaverton Council.

III. Implementation Phases

Implementation of Bond funded projects is expected to occur over a period of four to seven years. This timeline will allow for the identification of sites, securing needed resources for capital and services, forming partnerships with developers and service providers, procurement of projects through public solicitations, and completing construction. During this period, community needs and opportunities may change. New census data will become available, new community planning efforts may be initiated or completed, and new resources or opportunities may become available while other resources or opportunities may not materialize as anticipated. In addition, certain framework goals may be easily fulfilled, while others may prove more

challenging. Because of the dynamic nature of this work, Beaverton proposes to periodically review, and potentially alter, this Implementation Strategy.

Notwithstanding the four to seven years implementation timeline, being responsive to the demonstrated community need for affordable housing is essential and Beaverton will work to fund projects as soon as possible. The Mary Ann, a Phase 1 project, has already been approved (more details about this project can be found in the Project Selection Process). In addition, the City expects to issue solicitations for two projects shortly after the Metro-City of Beaverton Intergovernmental Agreement (IGA) is approved. A third and final solicitation is expected to be issued in the spring/summer 2020.

Beaverton proposes to take a portfolio approach to implementing Bond resources, monitoring and adjusting the LIS when appropriate (Exhibit 2). Because the pace of implementation is uncertain, these review points will not occur at specific points in time, but instead will be based on the commitment of Bond resources to specific projects. Beaverton will use Exhibit 2 tracking worksheet as an addendum to this Implementation Strategy. As project commitments are made, the tracking worksheet will be updated to show balances of funds available, and the framework goals met and still to be achieved. This will provide a real-time update that can guide the selection of the subsequent projects to ensure that overall goals and resource commitments are consistent with the Metro framework. Should the tracking worksheet indicate that a modification to the adopted Implementation Strategy is advisable; the amendment process will include community engagement based on our on-going community engagement process, review and approval by the Beaverton City Council, and submission to Metro for review and approval.

IV. Organizational Plan for Implementation

Beaverton will use a combination of staff and consultants to administer this Implementation Strategy. In-house staff will be responsible for community engagement and outreach, project selection process, project documentation and funding processes, as well as overall program monitoring and reporting. Beaverton may engage consultants with expertise in financial packaging of affordable housing to review proposed projects during the selection and commitment phases. Similarly, Beaverton may engage consultants or partner with other project funders to leverage their expertise in construction management to help oversee project development.

Some aspects of implementation will require the development of systems new to Beaverton, or that are not efficient at the scale of the handful of projects that are expected to be funded with the Housing Bond. Depending on the activity, either Beaverton will create its own tracking/compliance system or may work with Metro or other jurisdictions to create effective implementation strategies.

In addition to the city's General Fund dollars supporting the housing staffing necessary to implement the bond, Metro has also committed $655,591 over five years to augment Beaverton's staffing plan for bond implementation. Initially, Beaverton anticipates these

funds will support the addition of one full time equivalent position for community engagement, racial equity work, and monitoring restricted covenants via regulatory compliance agreements. City Council approved this new position effective April 1, 2019.

V. Project Selection Process

Beaverton will work in partnership with developers/owners that are skilled and interested in providing affordable housing and services in the community. The City of Beaverton itself does not intend to be a developer or owner of housing funded under the Bond. Beaverton expects that the Bond funds will provide support for **four projects**.

The City of Beaverton is in the process of creating a Housing Technical Advisory Group (HTAG), which will provide feedback to staff and advise the Mayor on affordable housing related manners, including Housing Bond projects. Like other City of Beaverton advisory groups, every attempt will be made to ensure gender/ethnic diversity as well as industry and end-user expertise.

The city's Real Estate Committee (REC) is an internal committee advisory to the Mayor charged with reviewing city real estate investments. The REC will review proposed projects prior to staff presenting them to the Mayor and subsequently City Council.

The project selection process will include public and open solicitations via Notice of Funds Availability (NOFA), Requests for Qualification (RFQ), and Requests for Proposals (RFP), etc. Both internal housing staff and an external review committee will review proposals and make recommendations to the Mayor. Each external review committee will be comprised of experts in affordable housing finance, resident services, homelessness, and development. Prior to the recommendation being presented to the Mayor, the selected proposals will be reviewed by the HTAG and REC for their feedback. The recommended project and feedback are forwarded to the Mayor, who will forward a recommendation to City Council for its selection decision.

Every solicitation document will include a set of expectations for all developers/owners to ensure selected projects achieve both the framework goals and racial equity outcomes. These requirements include a 60-year affordability covenant, inclusion of minority and women owned contractor participation in the development process, and the use of best practice outreach and tenant selection criteria. Specific requirements are fully described in the Project Selection Criteria and Project Implementation sections below.

An exemption to this process is The Mary Ann affordable housing project. This project is expected to be the first project to be funded with Housing Bond resources in Beaverton, and the reasons for being exempted from this selection process are detailed below.

Phase 1 Project – The Mary Ann (1st & Main)

Consistent with Metro and Beaverton's intent to demonstrate timely progress in Bond implementation, the City of Beaverton identified a Phase 1 early project: The Mary Ann.

This project will be located at First & Main on a half block site with the capacity for approximately 54 units. Beaverton currently owns a portion of the site and REACH Community Development Corporation (REACH CDC) controls the balance of the half block. Given the property ownership structure, Beaverton selected REACH CDC through a sole source negotiation, as the combined properties can provide for an efficiently scaled development. REACH has a 30+-year history of affordable housing development and operations expertise across the metro region.

The site is a block from Beaverton High School, has great access to transit, and is in a qualified census tract for the purposes of low-income housing tax credits. The adjacent high school has a majority minority enrollment, so housing located near the school could serve a diverse tenant population. The project location supports feedback received during the Listening Phase from community members stressing the need for affordable housing with access to amenities and schools. The city also prioritized this project to leverage city-owned property and the Washington County's commitment of federal HOME Investment Partnership Program funds.

The project is currently envisioned to include a beneficial mix of housing units, including 26 two-bedroom and 3 three-bedroom units targeted to families with children. Eleven of the 54 units will be priced at 30% AMI, and eight Project-Based Section 8 vouchers will ensure those units are affordable to Beaverton's lowest income households and help the project perform financially. While no special needs sub-populations have been identified at this point, REACH CDC and the city will explore opportunities for partnerships with Washington County for the funding of services, and/or service providers who may have clientele needing housing and/or providers who may have valuable services to offer to residents.

The Mary Ann has an estimated total development cost of $20.9 million. Anticipated funding sources include 9% Low Income Housing Tax Credits (LIHTC), Metro Regional Bond funds, permanent debt, Washington County HOME funds, land write-down of the city's parcel, among other funds. If REACH CDC is successful in receiving 9% LIHTC allocation this summer, the project is scheduled to break ground in the first quarter of 2020 and open 18 months thereafter.

Other Sites Identified by the City

Elmonica – The city, in partnership with Metro, has also identified the Elmonica site for a project using Housing bond funds. The Elmonica site is a Metro-owned property, located in west Beaverton on Baseline Rd in the Elmonica light rail station area. The site benefits from excellent access to transit and is in a mixed income neighborhood with commercial services. The site has capacity for 75-85 units. Because of the location, the site can accommodate many different objectives such as senior housing, family housing, and deeply affordable (30%) units, all of which community members expressed a need for during the Listening Phase of our community engagement process. The site is in a federally designated Qualified Census Tract (QCT). A QCT is a geographic area defined by the Census Bureau in which at least 50% of households have income less

than 60% AMI. This designation enables the project to maximize the amount of tax credits and the impact of 4% LIHTC as part of the financing package.

The developer/owner of this site will be selected using an RFP jointly managed by Beaverton and Metro. Metro will lead negotiations with the selected developer for disposition of the land. Beaverton will lead financing/funding negotiations.

Other Sites – Beaverton is exploring other sites that the city owns or controls that may be desirable for Housing Bond financed projects. Based on feedback received from the early community engagement process, the city will prioritize such sites if they support Implementation Strategy goals and are consistent with feedback. The city will take into consideration:

- the beneficial leverage of free or discounted land;
- high opportunity areas, these areas are defined by with access to good transit, good schools, services, and other amenities;
- opportunities to meet community development goals or develop beneficial service partnerships; and/or
- opportunities to use 4% LIHTC resources

Should Beaverton identify additional city-owned sites under its Local Implementation Strategy, the developer/owner of such sites will be selected using an RFQ or RFP process.

Sites Identified by Metro

The allocation of Affordable Housing Bond funds includes an allocation for land acquisitions carried out by Metro rather than by the implementing jurisdictions. Metro has allocated an estimated $21 million for acquisition in Washington County. The city will encourage Metro to purchase sites within Beaverton to further leverage the city's allocation of bond funds.

While it is uncertain whether any such sites will be in Beaverton, the city is committed to working closely with Metro should such sites be identified and align with the established LIS. If such sites are identified that meet LIS criteria, Beaverton would work with Metro on the acquisition and jointly select a developer/owner through a competitive process.

Sites Proposed by Developers

The City of Beaverton expects that one of the four projects to be funded using Metro Regional Bond Funds will be selected through a NOFA process. Through this NOFA, the city will target areas with little or no affordable housing and emerging areas near good schools. The NOFA process will follow all Metro and city requirements pertaining to the bond and the selected developer will be required to meet cost, unit mix, affordability, accessibility, and racial equity goals.

VI. Leveraging Other Affordable Housing Resources

While the Metro Bond resources are substantial, those funds will need to be blended with other public and private funding sources, including city resources, to accomplish the unit targets of the Bond. Several principles will guide city efforts to leverage the Bond funds:

- **Maximize the use of non-competitive resources.** The 4% LIHTC program is available on a non-competitive basis to provide equity for affordable housing development. This program is especially useful for larger projects or scattered site projects that can be bundled to achieve the scale desired by equity investors. Developing projects in QCTs or Difficult to Develop Areas (DDAs) can maximize the usefulness of the 4% tax credits.
- **Maximize use of private resources.** Many projects will generate enough rental income to be able to make debt service payments on loans from private banks. While ensuring that projects have appropriate operating budgets and reserves, private debt should be secured for projects whenever feasible.
- **Maximize local resources.** A variety of local resources may be available to support capital and operating expenses:
    - **Project based rental assistance.** Washington County Housing Services has committed project-based Section 8 assistance for 33 units to Beaverton Bond projects. This assistance will allow residents to pay based on their household income, while the project will receive a set rental income based on the Section 8 payment standard.
    - **Property tax exemption.** The City offers property tax exemption to developer/owners that are non-profits under the provisions of ORS 307.540 and apply to the city's program. Other options for property tax exemption may be possible on a project-by-project basis.
    - **Publicly owned land.** The City will prioritize projects developed on City-owned or other publicly owned sites. The ability of the City or other jurisdictions to donate the full value of the sites may vary, but discounted values would be available.
    - **Direct grants or investments.** The City has historically made direct investments in affordable housing. While there is not a specific appropriation at this time, the City is exploring project needs and possible City resources that can support Bond-funded housing projects. Current program modeling shows an additional gap of $2 - $6 million for Housing Bond funded projects.
    - **System Development Fees (SDC) assistance.** City Council adopted a resolution on December 4, 2018, to provide limited SDC relief for regulated affordable housing projects and directed staff to collaborate with other jurisdictions that charge SDCs to Beaverton projects for additional SDC relief.
- **Seek other existing affordable housing resources (Federal, State and County resources).** The City recognizes that despite the substantial amount of Bond

funding and the strong commitment of resources from the City, projects may have financing gaps that are best filled with other traditional affordable housing program resources. Sources such as the county HOME funds, State Document Recording Fee, OAHTC, and other sources may be needed to complete financing packages for specific projects. In partnership with the selected developer, Beaverton will work with other funders in a transparent way to find the most effective and efficient way to bring these resources to Bond funded housing projects.

- **Support the pipeline of other affordable housing projects.** While much of Beaverton's efforts during the implementation of the Affordable Housing Bond will be focused on moving the pipeline of Bond funded projects forward, the ongoing availability of other Federal and State affordable housing resources means that there is a likelihood other projects may move forward during the same timeframe. Beaverton will monitor the pipeline of projects proposed and funded in Beaverton and will collaborate with developers to identify the most appropriate funding packages and other support that can be allocated to those projects.
- **Funding for resident and supportive services.** Beaverton will work with regional and state partners to identify a consistent funding source to serve vulnerable homeless or at the risk populations. It is through consistent funding of resident and supportive services that vulnerable populations can remain housed and help the project succeed financially.

VII. Project Selection Criteria

Metro Framework

Beaverton will consider a number of factors in the selection of Housing Bond projects. The first consideration will be how each project contributes to the accomplishment of city's goals in the Metro Framework. Under the Framework, Beaverton has the following targets:

Framework Targets	
Total Units	218
Minimum number of 30% AMI Units (33 units with Project Based Sec 8 rent assistance)	89
Minimum number of 2 Bedroom & Larger Units	109

Beaverton does not expect that each project will reflect the ratios expressed by these targets, but instead will ensure that the overall portfolio of funded projects will achieve this mix.

The ratio of small and large units will reflect the characteristics of the target population of specific projects, and that in turn, should reflect characteristics of a site in terms of whether it is best suited to families with children or smaller households.

Beaverton also anticipates that all projects will include some units with rents at 30% AMI. In some cases, projects will be targeted to low wage earners, while others may be targeted to people with disabilities or other special needs, or people who have experienced homelessness. Some projects may include high concentrations of 30% units so long as there is an identified consistent funding source for the corresponding supportive services needed.

Beaverton is open to considering the inclusion of 61%-80% AMI units when that helps to cross subsidize lower income units or reduces the amount of Bond financing needed for the project, although no such units are currently contemplated.

Beaverton will focus its Bond financed affordable housing on new construction of multi-family rental projects and may also consider multi-family acquisition/rehabilitation projects. Although allowable, Beaverton is not considering investing Bond resources in home ownership strategies.

Furthering Beaverton's Affordable Housing Goals

In addition to fulfilling the Work Plan, Beaverton will work to align the affordable housing developed with the Bond to also support a variety of local goals. These include:

- Geographic Goals – Beaverton desires to support projects in opportunity neighborhoods that have good access to transportation, commercial services, community amenities, and provide the opportunity to create inclusive mixed income neighborhoods. This feedback was also received during listening sessions and reinforced during the feedback phase, with requests for housing with access to schools and amenities. These areas include the emerging downtown, recently annexed areas, and areas where private/public investment is being made to improve the livability of the area. Beaverton will seek to disperse units throughout the city, where these locational attributes meet.
- Target Population Goals – During the Listening phase, the city received reminders of the need for senior housing, family housing (to include three and four-bedroom units), housing accessible to high needs populations, housing that is compliant with the American with Disabilities Act (ADA) by utilizing universal design, and housing for individuals exiting the foster care system. Due to limited resources and the small number of projects to be funded under the bond, addressing all these needs will not be feasible, but the city will strive to assist as many of these needs as possible.
- Complement other affordable housing related activities – The Housing Bond funds allow the city to leverage its funds to continue its work on other affordable housing strategies. These include working with property owners to identify ways to improve the housing stock while avoiding forced displacement of tenants, collaborating with market rate developers to include affordable/restricted units

in their development, working with homebuilders to increase affordable homeownership stock, and providing down-payment assistance for additional affordable home ownership opportunities.

Racial Equity

Beaverton's approach to racial equity in project selection will take into consideration factors such as:

- Increasing affordable housing in areas with existing underserved diverse populations, especially in areas that may be subject to displacement.
- Providing new affordable housing in high opportunity neighborhoods and sites. This would include sites that have good access to transit, jobs, quality schools, commercial services, parks & open space, etc.
- Supporting project teams that have a proven track record of:
    - Outreach, engagement, and ensuring participation of minority and women owned contractors in pre-development and construction of the project, as well as the on-going maintenance of the building;
    - Engaging targeted and/or marginalized communities, communities of color as part of its leasing process;
    - Creating an inclusive tenant screening criteria process, minimizing barriers to housing experience by communities of color;
    - Providing culturally specific resources and services. Beaverton recognizes that culturally specific programs can achieve strong outcomes for diverse groups in the community.

Beaverton will prioritize projects addressing the historical racism and lack of housing access experienced by communities of color, whether that is represented by projects sponsored by culturally specific organizations, or projects sponsored by partnerships in which culturally specific organizations have a meaningful role in project design and operations, or sponsors provide sufficient proof of their ability to connect with communities of color.

Connection to Services

Beaverton expects that Resident Service Coordination will be provided at all projects, appropriate to the level of need of the target population. Resident Services will focus on eviction prevention, helping residents' access mainstream services for which they may be eligible, and community building activities.

Projects serving high needs populations will require robust supportive services to ensure resident stability and positive outcomes. While Beaverton is not a significant provider or funder of supportive services, it is available, in partnership with Washington County, to help connect developer/owners to public and private service providers in the community to create needed partnerships. Beaverton will evaluate each projects target population and service plan to ensure that it is appropriate and durable.

Project Cost/Leveraging Funds

Beaverton plans to use Bond funds to support a portfolio of projects that provide the best return on investment in the form of long-term sustainable housing. These projects will be characterized by efficient design and durable construction. They will use cost effective green building measures to create efficient use of energy and water, and select materials to create healthy living spaces. They will be well aligned with the needs of the target households in terms of space, amenities and service requirements, and will be valuable assets in the communities in which they are located.

The blend of funding sources will have an impact on both hard and soft costs. Hard costs will be impacted by development standards of investors, lenders and other public funders. Soft costs will vary with requirements for specific legal, accounting, reserve requirements, and fees. Leverage will also be impacted by the service needs of the residents.

Beaverton will evaluate all proposed projects to ensure that the costs are reasonable and appropriate to the specific project. In doing this evaluation Beaverton will focus on the amount of Bond funds needed rather than the total development costs of projects. This evaluation may consider:

- Scale appropriate to the target population.
- Scale appropriate to the neighborhood in which the project is located.
- Costs associated with mixed use projects.
- Quality of construction materials.
- Costs associated with service needs of the target population.
- Reasonable fees and reserves.

Beaverton recognizes that in order to accomplish the overall unit target, it will need to have an average Housing Bond expenditure per unit of approximately $143,000. Some projects may receive significantly less Bond funds than this amount, while others may receive significantly more. The Bond funding levels available for specific projects or funding processes will be clear in the tracking worksheet that is attached to this Implementation Strategy. To the greatest degree possible, Beaverton will try to curate the overall pipeline of projects to achieve the framework goals within the available resources, including private, state, federal and local funds. However, additional resources, including local, may be needed as displayed in Exhibit 2, Beaverton Allocation table, where it shows an estimated deficit of $2.3 million.

Capacity/Readiness to Proceed

Affordable housing is a specialty business that differs in many ways from market rate housing or other real estate development. Beaverton will seek to partner with non-profit, for-profit, or governmental organizations that have demonstrated skills as affordable housing developer/owners. Expertise with the framework target unit types and with the specific population proposed by a project will also be considered.

Timely implementation of the Housing Bond is critically important. In its selection process, Beaverton will prioritize projects that have a clear path to timely completion. The City may prioritize projects that have appropriate zoning, have secured much or all of the other financing sources, have secured needed service partnerships, have a clear and achievable racial equity plan, etc. Once a project is selected, the city will work and assist the selected developer, to whatever degree possible, through the land use and permitting processes.

VIII. Project Implementation

Review & Approval of Projects

Bond funded projects will go through a multi-level review and approval process as follows:

- Beaverton concept endorsement. The project solicitation and selection process include review and recommendation by an ad-hoc review committee. The recommendation is reviewed by the HTAG and REC for feedback and subsequent recommendation is made to the Mayor. The Mayor makes a recommendation to City Council. Staff will present the potential project to City Council for concept approval and to authorize the Mayor to submit the project to Metro for concept endorsement. To be presented at Council and later be forwarded to Metro for concept endorsement a project must, at a minimum, have site control, a preliminary development plan, preliminary estimate of total development costs, preliminary estimate of needed Housing Bond funds, an identified development team, and a preliminary racial equity plan.
- Metro concept endorsement. Metro staff will review the request, assess the project's compatibility with the LIS and provide a recommendation for endorsement by the Metro COO.
- Beaverton project approval & funding authorization. As the project completes due diligence and moves to financial closing, Beaverton will process project approval by presenting final project details to the HTAG and REC for final review and recommendation. These recommendations will be presented to the Mayor for review, and the Mayor will present the funding request to City Council for the appropriate action.
- Metro project approval & funding authorization. Metro staff will present the project to Metro for final approval and funding authorization per the Beaverton-Metro Intergovernmental Agreement (IGA) process.
- Release of Funds. Once a project has received approval by the Beaverton City Council and Metro, funds will be released to Beaverton and disbursed to the project in accordance with the provisions of the project documents and the IGA.

Project Closing

- Metro-Approved Regulatory Agreement. All projects will be required to execute a Metro-approved Regulatory Agreement that acknowledges the use of Metro

Housing Bond funds and the restrictions associated with the use of such funds. The Regulatory Agreement will be recorded against the project at or prior to closing.

- Period of Affordability. The Regulatory Agreement will generally specify a 60-year period of affordability. The Regulatory Agreement will provide a right of first refusal for qualified nonprofit organizations or government entities to acquire the project upon expiration of the affordability period.
- Accomplishment of Framework Targets. The Regulatory Agreement will also specify the level of affordability and the unit bedroom sizes of the project.
- Resident and Supportive Services for Permanent Supported Housing units. The Regulatory Agreement will align services associated with PSH units to the availability of funding for the services. The unit will cease to operate as a PSH should funding for services no longer be available.
- Reporting Requirements & Monitoring During Operations. The Regulatory Agreement or similar agreement will also provide requirements for periodically providing information relating to the project's financial performance, physical condition, occupancy, tenant income verification, and voluntarily collected tenant demographics. The agreement calling for these reports will provide that reports will be made for the benefit of both Metro and the City of Beaverton. The agreement will also provide physical access to the property when requested by Metro, the City of Beaverton, or other project financing partners.
- Jurisdiction Documents. The City of Beaverton will require a variety of other documents relating to the project. These may include:
    - Disposition and Development Agreements. In the case of properties controlled by the City of Beaverton, the City will develop agreements relating to the transfer of property to the developer/owner.
    - Beaverton will develop documents relating to the form of investment of Bond Funds. These may vary depending on projected cash flow of different projects and may take the form of cash flow dependent loans or grants. In general, Beaverton will support the allocation of modest amounts of program income to restricted reserve accounts dedicated to capital accounts and/or the provision of Resident Services. Projects that are expected to have more significant program income may have requirements for cash flow dependent distributions to the City.
    - Beaverton will specify requirements relating to implementation of Racial Equity Strategies. Strategies will be developed for each project, and requirements will be documented in agreements with the City. This will include:
        - **MWESB (Minority, Women, Emerging Small Business and Disabled Veterans) Contracting**. Bond project sponsors will be required to make good faith efforts to achieve 20% subcontracting participation on the development hard and soft costs to COBID certified MWESBDVs. Specific NOFAs, RFQs or RFPs may have additional goals or requirements. Those responding to Bond

offerings will be required to provide documentation of how they intend to meet COBID subcontracting effort requirements, and successful awardees will be required to report their ongoing project participation to the City.

In order to reach these goals, the City hopes to assist contractors make connections with agencies who work with the promoting, hiring and development of MWESB-DVs. The City has been proactive in meeting with Trade Associations and attending events to promote upcoming Bond projects in the region. As an example of this strategy, Beaverton, in partnership with the City of Hillsboro and Washington County, are hosting a structured informational event for developers, GCs, and trade associations about upcoming opportunities from jurisdictions, developers, and GCs. Complemented by a team building exercise, this event hopes to foster connections, build trust, and begin creating relationships that can lead to increased contracting opportunities and wealth among the MWESBDV population.

- **Workforce and Apprenticeship Participation**. Beaverton is interested in understanding the labor force make-up of each project and encouraging the utilization of apprenticeship programs. The City will track the labor force demographic and hours worked by each apprentice. While specific programs to further this goal are not developed at the time of writing the LIS, staff has engaged in conversation and outreach to pre-apprenticeship programs such as Oregon Tradeswomen, Constructing Hope and Portland Opportunities Industrialization Center. The city will also engage Metro, other implementing jurisdictions, and project sponsors to explore ways to maximize apprenticeship participation.
- **Affirmative Marketing, Tenant Selection & Lease-Up**. Consistent with Metro policy, Beaverton will work to ensure that Bond financed housing serves communities of color, families with children and multiple generations, people living with disabilities, seniors, veterans, households experiencing or at risk of homelessness, and households at risk of displacement. Beaverton will require that project developers/owners make best faith efforts to make units available to minorities and disadvantaged populations using best practice strategies. In general, this will require:
    - Affirmative outreach and marketing to target populations. Developers/owners, and their property management companies (if applicable) will be expected to engage in pro-active efforts to make disadvantaged populations aware of the availability of units, and the process and timeline for application. Beaverton will work with project

sponsors to identify specific target populations for each project and will review the proposed outreach and marketing strategy for each project.

- Beaverton will require that project sponsors use low barrier screening criteria that balances access to target populations, project operations, and community stability. Typical requirements may include less than standard market apartment income-to-rent ratios, reduced credit history requirements, and criminal history requirements that only consider recent convictions that are most directly tied to tenant success. Project sponsors will be required to review appeals to denials of standard screening criteria that take into consideration efforts of applicants that demonstrate stability and potential for tenant success. Project sponsors are also required to review appeals if the disqualifying aspects of a denial are related to a disability and make reasonable accommodations as appropriate.

Project Monitoring

Projects will be subject to monitoring throughout the development process and period of affordability. The monitoring process and expectations will be documented in agreements with the city. In general, this will include:

- Monitoring During Development & Lease Up. Beaverton will require monthly reports during the project development and lease up period and will conduct monthly site inspections in coordination with other funding partners to ensure progress to on-time and on-budget completion. Beaverton will sign off on any change orders and on monthly draw requests.
- During Operations. Beaverton will require annual reports that include information about project physical condition, fiscal condition, occupancy, tenant income verification, and voluntarily collected tenant demographics. Beaverton will conduct periodic site inspections in coordination with other funding partners.

Ongoing Community Engagement

Community engagement opportunities will be organized to allow people to engage across a spectrum of interest levels:

Inform Community Members: Some community members will be interested in hearing the highlights about the Local Implementation Strategy for the bond; others will continue to track the process and stay up to date on the latest project news. Staff will use multiple methods of outreach to inform community members about the bond implementation process and major project milestones to ensure community members stay informed. Staff will provide information to assist the

public in understanding the decisions made throughout the planning process and implementation information will be made broadly accessible through multiple means, channels, and sources.

Consult Community Members: Some community members will want to make sure the process and outcomes of the LIS broadly address the topics they are interested in. These individuals may desire to weigh in and provide feedback at key points in the process and have their voice be heard. Opportunities for such feedback will be provided via open houses, housing forums, City Council meetings.

Involve Community Members: Some community members, such as the Housing Technical Advisory Group (HTAG), relevant Beaverton Boards & Commissions, and other community groups will want to contribute concerns and directed advice throughout bond implementation on a long-term basis. Staff will engage these groups with timely and direct answers to questions, regular updates, and sit-down meetings when possible to discuss the feedback in greater depth. These groups may also act as "champions" of affordable housing and voice their support throughout project selection and development.

IX. Reporting on the Implementation Strategy

Annual Report

Beaverton staff will prepare an annual report to the Beaverton City Council on overall progress of the LIS. This report will be made available to the public and interested stakeholders. The report will include information on committed and completed projects (e.g. project status, Bond funding amounts, total project cost, and units produced by unit size, type and income level served). The report will also include information on overall progress toward achievement of the framework goals and balance of funding available.

Reporting to Metro

Beaverton will submit annual reports to Metro in accordance with the Intergovernmental Agreement.

Exhibit 1

OUTREACH REPORT:
AFFORDABLE HOUSING AND METRO REGIONAL BOND

Summary

The Affordable Housing Program undertook extensive consultation with the community to discuss the Metro Affordable Housing Bond and listen to community feedback including multiple Community Conversations. Events were hosted in trauma informed spaces and environments to ensure inclusivity. The City of Beaverton also partnered with Washington County and the City of Hillsboro to supplement findings and extend resources for engagement and outreach. At all Beaverton events interpretation/bilingual facilitators was available and actively utilized, childcare was provided, and refreshments were available. Events also utilized live polling to capture in-depth feedback. To make engagement opportunities inclusive and accessible events and presentations were conducted in a variety of locations, languages, and times. Every effort was made to approach all community engagement activities through a lens of equity and inclusion, with special attention paid to reaching historically underrepresented groups. Efforts were made to reach low income community members, people of color, people with limited English proficiency, immigrant and refugees, senior residents, people with disabilities and people who have experienced housing instability by hosting targeted opportunities directed towards the Arabic community, Latino parents in the Beaverton School District, and Habitat for Humanity clients and by attending meetings for groups and organizations representing these communities. The City of Beaverton asked the following questions:

1. What are the things that are most important to you and/or your family when you think about where you want to live?
2. What do you think are the biggest challenges people have with keeping their housing?
3. What types of services, programs, and/or activities are needed to overcome these challenges?
4. What do you think are the biggest challenges people face when trying to find a place to live?
5. What is the best way for you to find out about available housing?

The listening session held on **March 31** was completed in partnership with **Habitat for Humanity** and focused on Habitat clients. This was the most diverse audience of all presentations. Attendees represented recent immigrants, longtime residents, multiple nationalities, different age groups, and multiple ethnicities and races. At the request of an Iraqi community member, the listening session held on **April 19** focused on the **Arabic community.** Two members from that community promoted the event, translated the materials and guided group discussions. In partnership with the City's Planning team and the Beaverton School District, staff held a listening session at Beaverton High School's **Latino Night** on **April 24.** City staff conducted this event in Spanish to better

connect with the audience. The **Community Conversation** held **April 4** was directed at the community, with postcards sent to multi-family residences in Beaverton and a robust social media campaign. The April 4 event relied on group discussions facilitated by members of the Beaverton Committee for Community Involvement (BCCI). This event was supplemented by an **open house** on **May 16**, designed as a follow-up opportunity for those who attended the April 4 listening session and for those who have not provided feedback yet. The open house format provided an informal opportunity for staff to greet and interact with attendees, while continuing to build community trust and close the feedback loop. At both events open to the public, attendees included senior residents and people with disabilities who expressed the challenges of making ends meet on a fixed income.

In addition, the City attended a variety of other meetings and events including City boards and commissions. Committees such as the Diversity Advisory Board (DAB), Human Rights Advisory Commission (HRAC), Beaverton Committee for Community Involvement (BCCI), and Beaverton Committee on Aging, provided first-hand knowledge of their housing experience and insight on the best outreach and engagement methods to reach the diverse Beaverton population. 40% of people serving on a Beaverton board or commission are a person of color. A majority of the members of DAB and HRAC are people of color. The Beaverton Committee on Aging is made up of a combination of community members with direct experience with seniors and people with disabilities either in their personal or professional experiences.

Through opportunities detailed above, the City of Beaverton was able to hear feedback from over 200 people. **Sixty-nine percent of those who attended feedback events were people of color**, where demographic information was provided. Demographic information was collected at events in table marked with an asterisk. This included **8 presentations, events, and meetings**. See table below for more information on each engagement opportunity.

Date	Stakeholder Group (Asterisk indicates demographic information compiled)	Location	Total Participants	Agencies
3/21/19	Habitat for Humanity Listening Session*	Beaverton City Library	29	1
3/25/19	Beaverton Committee for Community Involvement	Beaverton City Hall	22	1
4/03/19	Human Rights Advisory Commission	Beaverton City Hall	11	1
4/4/19	City of Beaverton Community Conversation*	Highland Middle School	97	1
4/08/19	Diversity Advisory Board	Beaverton City Hall	15	1
4/09/19	Beaverton Committee on Aging	Beaverton City Hall	12	1

4/19/19	Arabic Community Listening Session*	Beaverton City Library	11	1
4/24/19	City of Beaverton and Beaverton School District Latino Night*	Beaverton High School	13	2
5/16/19	Affordable Housing LIS Open House	Highland Middle School	33	1
5/22/19	City of Beaverton and Beaverton School District Latino Night*	Beaverton Middle School	18	2
6/6/19	Arabic Community Feedback Session*	Beaverton City Library	23	1

Staff connected with the following nonprofit and for-profit developers: Hacienda Community Development Corporation (Hacienda CDC), Native American Youth and Family Center (NAYA), REACH Community Development Corporation (REACH CDC), Central City Concern (CCC), Community Partners for Affordable Housing (CPAH), Innovative Housing Initiative (IHI), Bridge Housing, Related, and Community Development Partners (CDP). Conversations with these organizations ranged from responding to affordable housing development interests and opportunities, development challenges, zoning/permitting, incentives, timing, and other related topics. Staff attended the METRO event, "Developing with the Regional Housing Bond: Progress Update and Discussion" geared towards community development corporations and other developers.

Requiring minority and women contracting as well as workforce apprenticeship participation are key components of the implementation strategy. Due to limited capacity and resources, the City has been historically unable to be more active in these programs. To grow and enhance these programs, staff met with a variety of trades, advocacy organizations and general contractors. The objective of these conversations was to establish connections, understand barriers, help facilitate partnerships between developers and contractors, and discuss affordable housing cost containment strategies.

The table below lists the contacts made thus far with developers, contractors and trade organizations.

Date	Stakeholder Group	Topics of Discussion
10/10/18	REACH CDC	Development opportunities, programing, services
1/8/19	Central City Concern	Development opportunities, programing, services
1/16/19	Community Partners for Affordable Housing	Development opportunities, programing, services

2/1/19	Bridge Housing	Development opportunities, programing, services
3/11/19	Walsh Construction	Apprentice program, minority contracting, cost containment strategies
3/22/19	Innovative Housing Inc.	Development opportunities
3/26/19	Related	Development opportunities
3/29/19	Hacienda CDC	Development opportunities, programing, services
4/5/19	Native American Youth and Family Center	Development opportunities, programing, services
4/9/19	Oregon Association of Minority Entrepreneurs	Minority contracting, partnership opportunities and engagement
4/15/19	MESO	Micro enterprises and minority contracting, partnership opportunities
4/18/19	Community Development Partners	Development opportunities
4/18/19	National Association of Minority Contractors	Minority contracting, partnership opportunities
4/19/19	Latino Built	Minority contracting, partnership opportunities
4/24/19	Prosper Portland	Program implementation strategy
4/24/19	IMPACT Beaverton/Beaverton Chamber of Commerce	Partnership opportunities and information sharing
4/24/19	Best HQ	Outreach for partnership opportunities
4/25/19	Professional Business Development Group	Minority Contracting Opportunities and information sharing
4/26/19	Oregon Tradeswomen	Partnership opportunities for women in the trades and information sharing
5/30/19	Constructing Hope	Pre-apprentice programs engagement
6/6/19	Adelante Mujeres	Partnership opportunities for Latinx small business
6/11/19	Portland Opportunities Industrialization Center (POIC)	Pre-apprentice programs engagement
6/19/19	Metropolitan Hispanic Chamber	Partnership opportunities for Latinx small business and partnerships
6/19/19	Native American Chamber	Minority contracting, partnership opportunities
6/18/19	Skanska	Minority contracting, partnership participation

By collaborating with Washington County and Hillsboro, Beaverton gleaned feedback from an additional 300+ people representing over 50 agencies (see Washington County Community Engagement Phase 1 summary). At each opportunity, the team provided a brief overview of the Metro Affordable Housing Bond and its impact in Washington County, and a description of the collaborative community engagement conducted

between the three jurisdictions. Opportunities also included facilitated discussions to answer the following questions:

1. What community-based organizations, service providers, advocacy groups, and communities should we connect with for input about Metro bond implementation strategies?
2. What are the things that are most important to you and/or your family when you think about where you want to live?
3. What do you think are the biggest challenges people have with keeping their housing?
4. What types of services, programs, and/or activities are needed to overcome these challenges?
5. What do you think are the biggest challenges people face when trying to find a place to live?
6. What is the best way for you to find out about available housing?
7. Is there anything else you would like to share about your experience or the need for housing in your community?

The table below outlines the community engagement opportunities conducted through Beaverton and Washington County collaboration:

Date	Stakeholder Group	Location	Total Participants	Agencies
2/07/19	Community Housing Advocates	Beaverton	12	11
2/06/19	Housing Support Services Network	Beaverton	57	42
2/13/19	Washington County Resident Advisory Board	Hillsboro	20	
3/11/19	Self Determination Resources	Beaverton	5	1
3/14/19	SOAR Immigration Legal Services/EMO	Hillsboro	3	1
3/18-3/27	Homeplate Youth Services	(survey)	10	1
3/18/19	Con Plan Workgroup	Hillsboro	31	17
3/25/19	Washington County Parole and Probation	Hillsboro	11	2
3/26/19	OR Law Center	(survey)	15	1
3/27/19	Community Action/CPOs Homeless Forum	Cornelius	43	2
4/4/19	Community Action – Family Advocates & Housing Specialists	Hillsboro	15	1
4/16/19	Head Start Policy Council (parents)	Hillsboro	23	1
4/15-4/17	Con Plan Focus Groups (6)	Hillsboro	38	4
5/22/19	Behavioral Health Council	Hillsboro	20	8

Overall, these sessions and meetings were very successful. By partnering with the City of Hillsboro and Washington County, the City of Beaverton was able to reach individuals and families experiencing homelessness and people with disabilities, as well as service providers working with these communities, outside of Beaverton's readily available network. Through both targeted and broad-brush marketing, the city reached a wide range of residents to discuss priorities for the Metro housing bond, provide education and awareness around the impact of the bond, and build community trust. Staff are cultivating and maintaining an interested and affected group's contact list that will be utilized as Beaverton moves into the feedback phase of the community engagement for the Metro bond and beyond.

Agencies reached through Hillsboro and Washington County collaboration are as follows:

- Boys & Girls Aid
- Beaverton School District Help Center
- Beaverton Social Justice League
- Bienestar
- City of Tigard
- CODA Inc.
- Community Action Organization
- Community Housing Fund
- Community Partners for Affordable Housing
- Community Participations Organizations 10, 12C, 12F, 13, 15
- Ecumenical Ministries-Second Home
- Families for Independent Living/DEAR
- Good Neighbor Center
- HomePlate Youth Services
- Housing Independence
- Impact NW
- Just Compassion
- LifeWorks NW
- Luke-Dorf, Inc.
- Hillsboro School District
- McKinney-Vento Liaison/HEN
- Marjorie Stewart Senior Center
- Mental Health Association of Oregon
- Old Town Church
- Open Door Counseling Center
- Oregon Department of Human Services - Tigard
- Oregon Law Center
- Portland Community College
- Portland Rescue Mission
- Portland State University - Impact Entrepreneurs/HRAC
- Project Access Now
- Proud Ground
- REACH CDC
- Sequoia Mental Health Services, Inc.
- Self Determination Resources Inc.
- Sequoia Mental Health
- SOAR Immigration Legal Services
- Veteran Affairs HUD-VASH
- Vose Neighborhood Advisory Council
- WC County Administrative Office
- WC Dept. of Community Corrections, Parole and Probation
- WC Dept. of Aging & Veteran Services
- WC Dept. of Housing Services
- WC Dept. of Land Use and Transportation
- WC Office of Community Development
- Write Around Portland

In many ways, the input and suggestions received during the community engagement opportunities substantiated the findings from other documents reviewed. Documents reviewed include:

- Community Alliance Tenants – Data Report
- Coalition of Communities of Color – Leading with Race Research Justice in Washington County
- Metro Equitable Housing Report
- Oregon Housing Committee Statewide Supportive Housing Report
- Washington County Consolidated Plan 2015-2020

Outreach Summary

A robust outreach strategy was developed and implemented for the events, including:

- Multi-family Housing targeted City postcard (10,000 households)
- March/April and May/June Your City newsletter
- Flyers distributed to neighborhood groups, boards & commissions meetings
- Leveraging Partner Organizations (Habitat for Humanity, Beaverton School District, etc.)
- Farmers Market tabling
- Press Release
- City website
- City online calendar
- City Facebook page
- Neighborhood Program Friday Update e-mail distribution list: 230 inboxes/week for four weeks
- Targeted outreach to BOLD (Beaverton Organizing & Leadership Development) participants
- E-Blast to growing Affordable Housing distribution list: 240 inboxes
- Cultural Inclusion monthly e-mail distribution list: 1,146 inboxes
  Emails to Neighborhood Association Committee distribution list (2,857) and Beaverton Board and Commission members (160 members)

Evaluation Summary

Since the same questions were utilized by the participating jurisdictions, staff were able to compile, code, and analyze responses for the same key themes. The key themes

illustrated throughout community responses included barriers to housing, service needs, location, marketing, and a small number of answers did not fit into any of these categories necessitating an "other" category. A detailed description of each theme is listed below and the percentage of responses that spoke to each theme.

Washington County, City of Beaverton and City of Hillsboro Engagement Opportunities Results:

- Barriers (52% of total)
- Service Needs (21% of total)
- Location (16% of total)
- Marketing (8% of total)
- Other (3% of total)

A summary of detail within each category is below.

Barriers
This category includes a variety of factors that prevent people from being able to secure or maintain housing. Specifically, these responses fell into one of the following categories:

- Cost (33%) – affordability of rent; application fees; costs to move; deposits; costs related to past rental history, criminal history, and credit history; and utility costs
- Screening Criteria (31%) – rental history; criminal history; credit history; citizenship status; and understanding what purpose screening serves and why it is necessary
- Navigation (16%) – complex system of finding and securing housing; complex application process; ability to understand and follow through with finding and securing housing; bureaucracy is overwhelming; mobility/transient nature of clientele;
- Housing Needs (9%) – unit size; accessibility for developmentally delayed people; safety/livability of units; spaces not trauma informed
- Cultural and Trust (8%) – Cultural differences in understanding of norms and compliance; and fear or distrust about stability of housing, neighbors, environment

Service Needs
This category includes factors that are related to specific services that could be offered onsite or ways in which services could better meet the needs of tenants. For the most part, responses were categorized as the following:

- Education (37%) – skills building for self-sufficiency, housing sustainability; vocational training and mentorships; and renter education related to navigating the system, understanding tenant rights, and compliance with rules
- Service Alignment (31%) – coordination between community-based organizations, agencies and other service providers; coordination of services specific to families and seniors;

- Addictions/Mental Health or other Case Management (16%) – onsite mental health and addictions services as well as case management for others who need that level of support

Other mentions included accommodations within the physical space such as community rooms, common space, and storage space

Location

This category includes specifics about where housing is located, proximity to things people may need to thrive and the environment in which housing is situated. Responses primarily fell into the following groups:

- Services (29%) – proximity to grocery stores, employment, medical providers, and other supportive services
- Safe/Sense of community (35%) – good schools; sense of community; and safe, quiet, walkable neighborhood
- Transit (21%) – close to public transportation; and accessible for special needs transportation (LIFT)
- Other comments included equitable distribution of housing in mixed-income areas with broad geographical dispersal

Marketing

This category was specifically focused on how people hear about housing and considerations in how to share information about housing with communities. This was a much smaller number of comments that predominately focused on sharing information through community-based organizations and other word-of-mouth opportunities as well as communicating information in multiple languages and formats.

City of Beaverton Specific Events Engagement Results:

See above for detailed description of each category and sub-category. Below are the results of community feedback compiled by the City of Beaverton at listening sessions: Habitat for Humanity on March 22, Community Conversation on April 4, Arabic Listening Session on April 19, and Latino Night on April 24.

- Barriers (54% of total)
- Service Needs (14% of total)
- Location (32% of total)

Barriers

- Cost (56%)
- Screening Criteria (12%)
- Navigation (13%)
- Housing Needs (15%)
- Cultural and Trust (4%)
- Other mentions included unstable family situations (i.e. divorce).

Service Needs

- Education (42%)
- Service Alignment (46%)
- Addictions/Mental Health or other Case Management (8%)

Location

- Services (29%)
- Safe/Sense of community (48%)
- Transit (17%)
- Other mentions were too generic to fall into any one category.

Outreach Recommendations from City of Beaverton Engagement (based on Question 5 results):

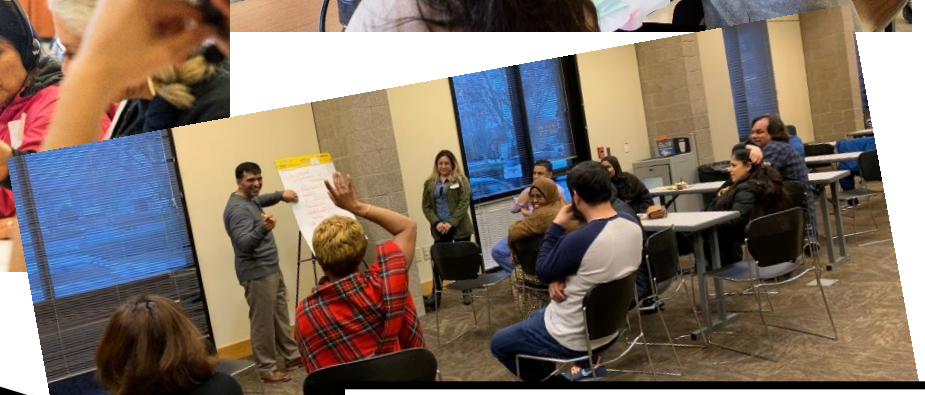
- Internet
- Word of Mouth
- Leveraging Partner Organizations
- Utilizing Community Locations
- Cellphone Based
- Creating Database of housing for renters and landlords
- Print Media

The most popular answers to this question were utilizing the internet, word of mouth outreach through community leaders and networks, leveraging partner organizations, and utilizing well-known community-specific locations (i.e. library, places of worship, etc.). However, several people noted that internet access is limited; necessitating continued and expanded print marketing to ensure affordable housing outreach is accessible to all. One idea that came out of this conversation was the need to create a "brand," so the community would know the availability of housing notice is from a trusted source.

Conclusion

Beaverton is pleased to be an implementing jurisdiction of the Metro Affordable Housing Bond Program. The city seeks to sustain its livability, particularly for those most in need. To that end, Beaverton's Local Implementation Strategy will guide the city's efforts to create affordable housing using proceeds from the Metro Affordable Housing Bond. These and other resources will play a critical role in the city meeting a range of important housing needs in the community, ensuring the livability of the community through the availability of affordable housing meeting the needs of the community. The community engagement process will continue inform every step of the way through the plan's implementation

Photos




Listening Session:
WELCOME!
أهلاً وسهلاً
Affordable Housing and Metro Regional Housing Bond
حلقة مناقشة:
الإسكان بالتعاون مع مدينة بيفرتون
April 19, 2019


Community Conversation
Affordable Housing
& Metro Regional Bond
Conversación de la Comunidad: Vivienda Asequible y Bono Regional Metro
Thursday, April 4 | 5:30-7:30 PM
Highland Park Middle School
7000 SW Wilson Ave
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.
Everyone welcome. Dinner, Spanish interpretation and childcare provided.
Todos son bienvenidos. Se proporcionará interpretación al español y cuidado de niños.
Learn more at:
BeavertonOregon.gov
Beaverton

Exhibit 2

BEAVERTON LOCAL IMPLEMENTATION STRATEGY

PORTFOLIO APPROACH

Beaverton Portfolio

	Metro Bond	% of Total
Beaverton Allocation	$31,140,595	100.0%
Used		
1st & Main	$3,000,000	
Elmonica	$10,147,258	
Project C	$11,089,856	
Project D	$9,171,202	
Total	$33,408,316	107.3%
Balance (Deficit)	($2,267,721)	-7.3%

Beaverton Portfolio

Production	**Per Project Modeling Total**				**Modeling Beaverton-Metro Units Target**		
	The Mary Ann	Elmonica	Project C	Project D	Total	Metro	Variance
Units	54	79	66	51	250	218	32
≥2 Bdrm	29	37	42	6	114	109	5
30%	3	19	22	12	56		
PBV	8	9	16	2	35		
Total	11	28	38	12	89	89	0

Attachment 3 to Staff Report

Washington County Local Implementation Strategy
Metro Staff Evaluation Worksheet
July 17, 2019

LOCAL IMPLEMENTATION STRATEGY REQUIREMENT CHECKLIST

Meets requirements?		Local implementation strategy requirements	Staff Notes
Committee member review	Staff review		
☐	√	Anticipated number, size, and range of project types (estimates are acceptable) and cost containment strategies to achieve local share of unit production targets (including 30% AMI and family-size unit goals and the cap on units at 61-80% AMI) using local share of eligible funding;	**Anticipated Project Types:** Portfolio "scenario" describes 13 projects ranging in size from 5-175 units, with an average project size of 64 units. This scenario is labeled as "for illustrative purposes only." (See pp. 31-32) **Cost Containment:** The Plan states that the "amount of funding allocated to a project will be determined by the number of units at 30% MFI and whether the projects include family-size units" and acknowledges that in order to achieve overall unit production goals the average bond investment per unit will be approximately $143,000. General strategies and principles for cost containment are described. These include design for energy/water efficiency, durability, and healthy spaces; strategies to leverage a range of funding sources; and a commitment to evaluate projects based on principles identified by Meyer Memorial Trust's Oct. 2015 Cost Efficiencies Report. (See pp. 12, 22-23) **Distribution of Family-Sized Units:** The LIS expects that most developments will include units with two or more bedrooms. Selection criteria will give preference to projects with 3- and 4-bedroom units. (See p. 12 and p. 20) **Distribution of 30% AMI Units:** The Plan states that most projects will include units for residents with incomes of 30% or less of AMI, and that these units will be targeted to very low income households and may serve low wage earners, people with disabilities or special needs, or people who have experienced homelessness. "With the appropriate non-profit or for-profit organization skilled in delivering supportive housing with services, some projects may be designed exclusively to have 30% MFI units or have high concentrations of 30% MFI units." (See p. 20). **Strategy Review** The LIS describes a process for reviewing the strategy at 18-24 months and 48-60 months, in anticipation of potential changes to community needs and opportunities. (See p. 29)
☐	√	Consideration for how new bond program investments will complement existing regulated affordable housing supply and pipeline;	**Summary of existing need/supply:** The LIS summarizes data regarding affordable housing need and existing supply for Washington County and jurisdictions within Washington County. The data show particularly high unmet affordable housing needs in Tigard and Tualatin. (See pp. 12-13) **Pipeline:** The LIS indicates that the majority of Washington County's focus and resources will be on bond funded projects during the 5-7 year timeframe of their LIS, but that there will likely be at least some federal and state funding resources dedicated to non-bond projects during this time. HAWC will "monitor the pipeline of projects being proposed and funded in the geographic area of this Implementation Strategy and will collaborate with developers to identify the most appropriate funding and other support that can be provided to those projects." Washington County's HOME funds have a 15% set-aside for Community Housing Development Organizations (CHDOs) to support their organizational operations. (See p. 19) This aligns with the County's plan to set-aside bond funding for CHDOs, as discussed in the Project Selection section below (See pp. 16-17).

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☐	√	Goals and/or initial commitments for leveraging additional capital and ongoing operating and/or service funding necessary to achieve the local share of Unit Production Targets;	**Leveraged funding:** The LIS describes leveraging "principles" including maximizing the use of non-competitive and private resources, maximizing local resources, and seeking federal/state/county resources. The County's Housing Production Opportunity Fund (HPOF) currently has a $1 million General Fund allocation with unspent funds rolling into the FY19-20 budget, with a recommended addition of $4 million to be included in next year's budget. (See pp. 18-19) Local jurisdiction incentives (e.g. SDC/fee waivers) are included in project "evaluation criteria" informing amount of bond funding (See p. 13). The County has committed vouchers to support 124 of its 334 units slated for affordability at 30% AMI and states that some portion of these project based vouchers will be committed to HAWC owned projects and some will be available to other sponsors. (See p. 18). **Leveraged services:** Related to below PSH goal and resident services requirements, the LIS includes a commitment to "work with various agencies, local governments, non-profits and others to develop housing units in conjunction with the provision of services to allow an individual and/or family to be successful and thrive."
☐	√	Strategy for aligning resident or supportive services with housing investments, including [optional] any local goals or commitments related to permanent supportive housing; and	**PSH:** The LIS establishes a goal of achieving 100 PSH units. The County will look for opportunities to leverage existing services with project-based vouchers, and will monitor legislation at the State level regarding permanent supportive housing capital, rental subsidy and service dollars. **Resident services:** The County will require resident service coordination to be provided at all projects, appropriate to the level of need of the target population. Resident Services will focus on eviction prevention, helping residents access mainstream services for which they may be eligible, and community building activities. The County will work closely with its Dept. of Health and Human Services to connect developer-owners to public and private service providers in the community to create needed partnerships. County will require resident service coordination to be provided at all projects, appropriate to the level of need of the target population. Resident services will focus on eviction prevention, helping residents access mainstream services and community building activities. Washington County will utilize its project-based vouchers in different ways to leverage and support providers who can bring services to housing projects. Additionally, the County is working with social service agencies and other community partners to link supportive services to affordable housing. (See pp. 21-22)
☐	√	Description of project selection process (es) and prioritization criteria, including anticipated timing of competitive project solicitations and how existing or new governing or advisory bodies will be involved in decisions regarding project selection.	**Selection process:** Development opportunities, needs, and location priorities for housing will drive the selection of projects. Washington County will rely on ongoing relationships with jurisdictional partners and internal information from housing studies conducted by Washington County for the Office of Community Development and the Housing Services Departments to inform decisions. Washington County anticipates primarily selecting projects through regular Notices of Funding Availability (NOFAs) and with targeted Request for Proposals (RFP). (See p. 12) Developers may be selected outside of the RFP or NOFA process under the following conditions, assuming the projects otherwise meet the County's requirements and criteria: • If they are eligible for the CHDO set-aside (see below) • If a developer is proposing an acquisition of an existing building for conversion to regulated affordable housing • If a development site was comprised of adjoining parcels that included one owned by the County and one owned by the developer (See pp. 12 and 17) When there is opportunity to purchase property for the development of affordable housing, Washington County will consult with the local jurisdiction as well as other affordable housing developers to avoid any unintentional competition for the same sites. Washington County may develop and own the project or select a developer/owner to develop the site. In most instances, the county will use a transparent Request for Proposals (RFP) process to select an affordable housing developer/owner for sites controlled by the county. (See p. 17)

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			CHDO set-aside: The County will set aside $25 million set aside for Small Non-Profits and Community Housing Development Organizations (CHDOs), which include private nonprofit, community-based service organizations that include community members on their boards and develop housing specifically for the community they serve. The LIS acknowledges that these organizations play an important role in reaching difficult-to-house populations and communities of color. Set-aside utilization will be reviewed at 18-24 months and 48-60 months after adoption (as part of comprehensive LIS review). This funding will be outside of the NOFA and RFP process. (See pp. 16-17) **Site acquisition prioritization criteria:** Washington County will explore purchasing sites for affordable housing development, taking the following factors into consideration: • Free/discounted land; • Opportunities to meet community development goals or provided beneficial service partnerships; • Opportunities to maximize us of 4% Low Income Housing Tax Credit (LIHTC) resources. **Project selection Criteria:** Washington County will use seven factors to evaluate housing development and the amount of funding that may come from the Metro Affordable Housing Bond Program. • Jurisdictional and area partnerships and geographic dispersal • Housing needs data and Census tract analysis • Land availability and cost • Local development partners • Major public transportation and transit corridors • High opportunity areas, including sites located near transit, jobs, high-performing schools, commercial services, parks and open space, and basic needs services • Areas identified by HUD as Qualified Census Tracts (QCTs) or Small Area Difficult to Develop Areas (SADDAs) – designated areas where projects receive a 30% "boost" in LIHTC leverage (See pp. 13-14) **Threshold requirements:** To achieve goals of racial equity and to provide economic opportunities for minority-owned, women-owned or emerging and disabled veteran-owned small businesses, Washington County will apply threshold requirements for all developers and owners of Metro Affordable Housing Bond Program funded housing developments: • Threshold utilization goal of 15% for firms that have been certified by the State of Oregon as a Minority-Owned Business Enterprise, a Women-Owned Business Enterprise, a Disadvantaged Business Enterprise, or an Emerging Small Business (M/W/DBE/ESB) with an aspirational goal of 20% • Requirement that project developers and/or owners make units available to minorities and disadvantaged populations using affirmative marketing, low-barrier screening, and commitments to monitor lease-up outcomes. (See pp. 15-16) **Competitive criteria:** • Workforce participation • Permanent Supportive Housing • Culturally specific services to facilitate lease-up and ongoing services • Universal design principles (See p. 16) **Anticipated Timing of Solicitations:** The first NOFA is intended to be released in late 2019 or early 2020, with a goal to align the county's NOFA timeline with other resources potentially available at that time. The county is committed to a transparent project selection process and will publicly notify potential housing developers of future NOFAs as they are made available. (See pp. 17-18)

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			Role of governing/advisory bodies in Project Selection: Washington County will approve project selection according to the following process: staff level recommendation to the Housing Advisory Committee (15 members representing real estate, property management, finance, construction, design, planning, social service providers, minority and elderly groups, veterans and public housing residents), followed by a recommendation for approval to the Housing Authority Board of Directors which is comprised of the 5-member Washington County Board of Commissioners, one community member and a public housing resident. (See p. 24)
☐	√	Location strategy that considers geographic distribution of housing investments, access to opportunity, strategies to address racial segregation, and strategies to prevent displacement and stabilize communities;	**Evaluation strategy** Washington County will use seven factors to evaluate housing development: Jurisdictional and Area Partnerships and Geographic Dispersal, Housing Needs Data and Census Tract Analysis, Land Availability and Cost, Local Development Partners, Major Public Transportation and Transit Corridors, High Opportunity Areas and Areas Identified by HUD as Qualified Census Tracks (QCTs) and Small Area Difficult to Develop Areas (SADDAs). (See pp. 13-14)
☐	√	Fair housing strategies and/or policies to eliminate barriers in accessing housing for communities of color and other historically marginalized communities, including people with low incomes, seniors and people with disabilities, people with limited English proficiency, immigrants and refugees, and people who have experienced or are experiencing housing instability;	**Fair Housing:** The Analysis of Impediments to Fair Housing produced jointly with the City of Beaverton in 2012 as a requirement for receiving federal housing and community development funds, identified six strategy areas incorporated in the LIS. (See p. 6) **Other policies and strategies:** Washington County will require that project developers and/or owners make units available to minorities and disadvantaged populations using best practice marketing strategies which will require affirmative outreach and marketing to target populations, requiring project sponsors to use low barrier screening criteria, require sponsors to review appeals of denials of standard screening, use project-based voucher (PBV) RFP process to leverage units with low-barrier screening. (See p. 15)
☐	√	Strategies and/or policies, such as goals or competitive criteria related to diversity in contracting or hiring practices, to increase economic opportunities for people of color;	**Context** Washington County coordinated an affordable housing developer forum as well as a homeownership developer conference call to receive general feedback as well as to focus on issues of advancing racial equity, permanent supportive housing, and selection criteria. (See p. 11) **MWESB** Washington County is requiring a threshold utilization goal of 15% for firms that have been certified by the State of Oregon as a MWESB with an aspiration goal of 20%. (See p. 15) **Apprenticeship**

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			Washington County will work with WorkSystems and Metro to develop apprenticeship programs that benefit development teams for Metro bond-funded projects as well as participate in Metro's Construction Careers Pathways Project. (See p. 16)
☐	√	Requirements or competitive criteria for projects to align culturally specific programming and supportive services to meet the needs of tenants.	**Commitments** Commitment to work with various stakeholders to develop housing units in conjunction with the provision of services to allow tenants be successful and thrive. County will increase the number of accessible and visitable housing units for individuals of all ages and abilities through the use of universal design principles Washington County will set aside $25 million in Metro Affordable Housing Bond funds for projects sponsored by small grassroots nonprofit affordable housing developers and/or a CHDO based in Washington County. (See p. 16) Washington County will work closely with its Department of Health and Human Services to connect developer-owners to public and private service providers in the community to create needed partnerships. The County will also look for opportunities to leverage existing services with language in RFPs for project-based vouchers. **Requirements** County will require housing developers and sponsors to use marketing and outreach methods to reach communities of color and difficult to house populations. (See p. 16) County will require resident service coordination to be provided at all projects, appropriate to the level of need of the target population. These resident services will focus on eviction prevention, helping residents access mainstream services for which they may be eligible and community building activities.(See p. 21)
☐	√	Engagement activities focused on reaching communities of color and other historically marginalized communities, including people with low incomes, seniors and people with disabilities, people with limited English proficiency, immigrants and refugees, and people who have experienced or are experiencing housing instability;	**Focus Communities for Engagement** Consultation with over 300 community members as well as individuals representing over 50 agencies to understand key issues and suggestions to addressing affordable housing in collaboration with the County, Beaverton and Hillsboro. Attendance to existing community and agency-based meetings to gain as much varied input as possible. Staff heard from included communities of color and individuals with the following lived experiences: • Low-income • Seniors • Youth experiencing housing instability • Physical disabilities • Developmental disabilities • Mental health concerns • Addictions issues • Limited English proficiency • Immigrants and refugees • Current or previous experience of housing instability • Residents of low-income housing • Justice-involved • Service providers for people on probation and currently incarcerated • Citizen Participation Organization (CPO) members • Tribal community • Veterans (See pp. 7-8 and 33)

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☐	√	Summary of key community engagement themes related to local housing needs and priority outcomes for new affordable housing investments, approach to geographic distribution and location strategies, acknowledgement of historic/current inequitable access to affordable housing and opportunities for stakeholders to identify specific barriers to access, and opportunities to advance racial equity through new investments;	**Barriers** Cost (41%) – affordability of rent; application fees; costs to move; deposits; costs related to past rental history, criminal history, and credit history; and utility costs • Screening Criteria (24%) – rental history; criminal history; credit history; citizenship status; and understanding what purpose screening serves and why it is necessary **Service needs** • Education (25%) – skills building for self-sufficiency, housing sustainability; vocational training and mentorships; and renter education related to navigating the system, understanding tenant rights, and compliance with rules • Service Alignment (22%) – coordination between community-based organizations, agencies and other service providers; coordination of -services specific to families and seniors; **Location** • Services (24%) – proximity to grocery stores, employment, medical providers, and other supportive services • Safe/Sense of community (45%) – good schools; sense of community; and safe, quiet, walkable neighborhood **Marketing** • Predominately focused on sharing information through community-based organizations and other word of mouth opportunities as well as communicating information in multiple languages and formats. (See p. 9 for full summary of detail within each category)
☐	√	Summary of how the above themes are reflected in the Local Implementation Strategy.	**Themes** The following policies were developed based on the feedback received under the key themes identified above: • County's threshold project requirement of low-barrier screening criteria (Barriers) • Use of universal design as a competitive selection criterion (Barriers) • County's goal of 100 Permanent Supportive housing (PSH) units (Service needs) • County's housing development priority related to project in high opportunity areas (Location) • County's housing development priorities related to projects near major public transportation and transit corridor (Location) • County's threshold project requirement for affirmative marketing (Marketing) (See p. 10)
☐	√	Strategies for ensuring that ongoing engagement around project implementation reaches communities of color and other historically marginalized community members, including: people with low incomes, seniors and people with disabilities, people with limited English proficiency, immigrants and refugees, existing tenants in acquired buildings, and	**Focus** Community engagement will target three audiences: 1. Underrepresent communities- engagement will focus on community members providing advice about how Washington County can address and reduce systemic barriers. Conversations will be conducted via existing meetings, in-person gatherings, storytelling sessions, and may be supported or conducted by nonprofits and community groups that are trusted within the community. 2. Neighbors living in the area or adjacent to the new affordable housing developments. Outreach both in-person and online and will be limited to the time before and during which the project is being developed. 3. General community members. Engagement will be less intensive than with the first two groups but will be on going during the 5-7 years. Strategies are more likely to be electronic in nature and will focus on project updates and providing access to input mechanisms if desired. Ongoing community engagement will be based on expressed needs of the potentially impacted communities for each project, identifying preferred methods of engagement and utilize engagement strategies that are flexible and fluid based on community and stakeholder input. (See p. 26)

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		people who have experienced or are experiencing housing instability; and	**Contracting** Washington County will contract with a community engagement practitioner to provide additional capacity to continue efforts to engage under-represented communities, neighborhoods living around new affordable housing developments and the community in general. The community engagement consultant will: • Promote, publish and share opportunities and updates widely and in multiple formats and languages as needed. This may include electronically, hard copy, social media, and by telephone (as requested) • Provide trauma informed engagement opportunities and environments • Ensure that engagement opportunities are accessible to all by being held in the evenings • and/or on weekends, in different community locations and places where people naturally • convene, and include community support such as food, child care and translation services (See p. 26-27)
☐	√	Strategy for ensuring community engagement to shape project outcomes to support the success of future residents.	**Strategy** The completion and approval of the Washington County Local Implementation Strategy will initiate the beginning of Phase Two for community engagement related to the Metro Affordable Housing Bond Program's implementation. Phase Two is the long-term and ongoing community engagement directly related to planning, identification and development of affordable housing units. (See p. 26) Washington County's community engagement planning and approach will be sensitive to communities who may not trust that their input will lead to meaningful and/or constructive change and that communities may be fearful engaging with government agencies. Planning efforts will incorporate techniques to address these potential barriers to receiving the community's input. **Periodic Review** Washington County will review the implementation Strategy at a minimum of twice (18-24 and 48-60 months) during the implementation phase. (See p. 11) **Housing Advisory Committee** As part of the multi-stage review and approval process, before a project is forward to Metro for concept endorsement, the Housing Advisory Committee (HAC) will review the project and provide input to the Housing Authority Board of Directors (HABOD). The Housing Advisory Committee is comprised of 15 members representing real estate, property management, finance, construction, design, planning, social service providers, minority and elderly groups, veterans and public housing services. (See p. 23) **Evaluation Metrics** To gain and maintain public trust, Washington County will make every effort to develop ongoing evaluation measures that allow adjustments in response to expressed community need/wants and expected outcomes as evidenced in participation demographics and quality of participation, as well as tenant demographics and outcomes in future affordable homes. Evaluation metrics include: ▪ Were you able to successfully reach the intended audience? ▪ Did people receive the necessary information they needed to make a relevant response? ▪ Did you choose the right type or level of engagement to match the purpose? ▪ Was feedback received from the community positive or negative? ▪ Did the community feel like they received proper feedback on the results of the engagement? ▪ Did they indicate they want to be part of a similar process again? ▪ If not, why not? And what could be done differently to make the process better, more inclusive, and more impactful? (See p. 27)

Attachment 4 to Staff Report

WASHINGTON COUNTY
OREGON

July 1, 2019

Emily Lieb
Housing Bond Program Manager
600 NE Grand Ave.
Portland, OR 97232-2736

Re: Washington County Metro Affordable Housing Bond Local Implementation Strategy

Dear Ms. Lieb:

This letter transmits the draft Washington County Local Implementation Strategy (LIS) for Metro's review. The Board of Commissioners reviewed two previous drafts, with the first draft in April and second draft in May 2019. On June 25th the Board of Commissioners unanimously approved the submittal of draft three for Metro's review and approval.

The LIS is informed by extensive community engagement conducted by the county's community engagement team, as well as staff from the Housing Services Department and Office of Community Development. Key policy areas in Washington County's LIS include advancing racial equity through contracting during the development process and in the resident screening process during lease-up, supporting local nonprofits that are based in the county and have board membership that is reflective of the community, and leveraging Metro bond funds to produce 100 units of permanent supportive housing (PSH). Washington county's LIS reflects the diversity in the county and is an ambitious plan to successfully achieve the county's unit production goals within the next 5 – 7 years.

Our understanding is that the Community Oversight Committee will review the Washington County LIS at its July 24th meeting and Metro Council will consider approval of the LIS on August 1st. Please do not hesitate to contact Komi Kalevor at 503.846.4755 if you have questions or need additional information.

Sincerely,

Kathryn Harrington
Chair, Board of Commissioners

Robert Davis
County Administrator

C: Ruth Osuna
Komi Kalevor
Shannon Wilson

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Attachment 4 to Staff Report

Attachment 4 to Staff Report

Metro Regional Affordable Housing Bond Program
Washington County Local Implementation Strategy
DRAFT Three
6/25/2019

Washington County Local Implementation Strategy
DRAFT Three

June 25th, 2019

Table of Contents

I. Introduction

The Metro Affordable Housing Bond Program is a landmark funding source for affordable housing in the tri-county region. This Local Implementation Strategy guides the efforts of Washington County to create permanent affordable housing using the Metro Affordable Housing Bond Program. Housing primarily developed will be regulated affordable rental housing units, with the potential for regulated affordable home ownership units. County departments engaged in the implementation of the bond include: Housing Services, Finance, Land Use and Transportation, Facilities, Community Development, and the County Administrative Office. Additionally, county staff will be working closely with cities located in Washington County to create affordable housing throughout its jurisdiction.

Policy leadership for the implementation of the Metro Affordable Housing Bond Program will be guided by the Washington County Board of Commissioners. Also, as part of the review of bond funded housing development projects, the Housing Authority of Washington County (HAWC) will also have an important role in implementation of the bond program. The HAWC is governed by a seven-member Housing Authority Board of Directors (HABOD), which is comprised of the five-member Washington County Board of Commissioners, one community member and one public housing resident. The Housing Advisory Committee (HAC) advises the HABOD and is comprised of 15 members representing real estate, property management, finance, construction, design, planning, social service providers, minority and elderly groups, veterans and public housing residents.

As stated in Washington County's Strategic Plan 2020, **the Washington County Community – Our Vision** is to be a model *community for 21st century America, reflecting the best of our community's resources, achievements, diversity, values, and pioneering spirit. Washington County is a special community that deserves the best of our individual and collective efforts. Maintaining the quality of life in this community will require the planning, creativity, and action of all – across the divide of sectors and organizations. The fulfillment of our community vision will require governments, business, nonprofits, religious and civic organizations to align passion and resources to serve our community and citizens. The challenge is two-fold: 1) maintain the quality and effectiveness of existing mission-driven organizations and institutions; and 2) link together these vast resources to serve, protect, and reinforce the attributes of a safe, healthy, and vibrant community.*

For our part, we envision a "collaborative community" that recognizes the role, contribution, responsibility and interdependence of citizens and institutions, a community in which:

- *The diversity of our residents is celebrated.*
- *Our children and families have access to the resources and support to reach their full potential.*
- *Our housing is safe, comfortable and diverse, spanning the spectrum of affordability, effectively exploiting the benefits of proximity to work, school, services, and transportation.*
- *Our educational system provides a consistent level of excellence from preschool through graduate-level higher education, and residents have life-long access to a variety of educational opportunities.*
- *Our nonprofit institutions are known for their strength and dedication to the needs of their constituents, working in concert with government, business, and religious partners.*

- *Our residents and visitors are safe, and our justice system is coordinated, balanced, efficient, and responsive.*
- *Our abundant natural resources are nurtured for their inherent beauty, and their contribution to the health and well-being of our residents now, and for generations to come.*
- *Our environment and neighborhood livability are maintained, enhanced, and balanced with our community's growth and development.*
- *Our community recognizes the social, economic, and environmental factors that contribute to the health and well-being of citizens and works together to prevent illness, disease, and injury.*
- *Our economy is known for its diversity, future orientation, vitality, and commitment to the local community.*
- *Our private and public institutions work together to identify and problem-solve critical community issues.*

Autonomy & Collaboration within Washington County

Three jurisdictions in Washington County will be directly responsible for implementation of the Metro Affordable Housing Bond Program —Washington County, the City of Hillsboro and the City of Beaverton. Each jurisdiction will receive an allocation of bond resources based on the share of bond revenue generated by each jurisdiction as outlined in each jurisdiction's Intergovernmental Agreement (IGA) with Metro. Each implementing jurisdiction is responsible for developing its own Local Implementation Strategy, and will have autonomy in project selection, commitment of bond resources, and oversight of bond funded projects. The jurisdictions may choose to collaborate on specific projects that will serve their individual as well as collective community needs.

Recognizing that many community partners serve the larger Washington County area, and that many community members perceive that their needs could be met without respect to jurisdictional boundaries, the three implementing jurisdictions will collaborate on community engagement efforts and on developing the partnerships to ensure the success of all bond projects in Washington County.

In addition to working closely with the implementing jurisdictions of Hillsboro and Beaverton, Washington County will also work in conjunction with other cities located in the county and within Metro's jurisdictional boundary including Cornelius, Forest Grove, Tigard, King City, Tualatin, Sherwood and Durham. Washington County's implementation area also encompasses significant unincorporated areas of the County including the following communities: Aloha/Reedville, Bethany/North Bethany, Bonny Slope, Cedar Hills, Cedar Mill, Metzger, Raleigh Hills.

Metro Bond Resources and Framework Targets

This Local Implementation Strategy focuses on housing that will be developed in the areas of Washington County inside of the Metro Jurisdictional Area and outside of the cities of Beaverton and Hillsboro. See Appendix A for a map of the area. Bond revenues dedicated to Washington County are approximately **$116,465,532**. The overall goal is to support the development of at least **814 units of affordable housing** throughout Washington County. These 814 housing units are anticipated to house 2,505 low-income people in the County. These may be newly built units or existing units that are at risk of rapidly rising rents. While many of these units are expected to provide rental housing, affordable homeownership units can also be supported with bond resources.

Median Family Income by Percentage and Households Size for the Portland-Vancouver-Hillsboro, OR-WA Metropolitan Statistical Area

Household Size	30% MFI (annual)	60% MFI (annual)	80% MFI (annual)
1 person	$ 18,450	$ 36,960	$ 49,280
4 people	$ 26,370	$ 52,740	$ 70,320

Source: HUD.gov accessed on 4/24/2019

Median Family Income (MFI) as determined for the Metropolitan Statistical Area is updated by the U.S. Department of Housing and Urban Development. The three MFI bands identified in the chart above are the primary targets to provide varying levels of affordability. To provide context, the minimum wage in the Portland Metropolitan Area will be $12.50/hour as of July 1, 2019 (Source: Oregon.gov accessed on 5/13/2019). A person working full-time at a minimum wage job earns $26,000 annually.

Recognizing that our lowest income neighbors have the greatest challenges in securing affordable housing, and consistent with the Metro Bond Framework, Washington County has a goal of developing **334** units that are affordable for households with an income at or below 30% of Median Family Income (MFI). These units may serve people with special needs as well as people who earn low wages or have fixed incomes. At least **124** of these units will be supported with rental assistance provided by HAWC, allowing those units to be targeted for the most fragile households. Washington County will utilize its project-based vouchers in different ways to leverage and support providers who can bring services to the table. The county has also identified a goal of developing 100 units of Permanent Supportive Housing (PSH).

The provision of supportive services is essential to successfully house and stabilize many of our community's most vulnerable populations. To provide critical affordable housing services, Washington County is working with social service agencies and other community partners to link supportive services to the affordable housing to help people recover, achieve stability and thrive.

Much of the current private rental housing market is concentrated on small unit sizes, while the need for rental housing crosses a range of household sizes. This miss-match between need and available units is especially difficult for lower income households. As a result, the Metro Bond Framework has set unit production targets and guiding principles. Half of the units developed under the bond program must include two or more bedrooms. For Washington County, this means that at least **407** units will include two or more bedrooms. Another unit production target is that no more than 10 percent of homes will be provided for households making 61-80% of MFI.

Framework Unit Production Targets for Washington County (excluding Beaverton and Hillsboro)	
Total Housing Units Production Target	814
Target Housing Units with 2 or more bedrooms	407
Target Units for 30% MFI Households	334
Target Units for 31% - 60% MFI Households	399
Target Units for 61% - 80% MFI Households	81

These unit production targets are anticipated to be achieved through a portfolio approach, which will include the development or acquisition of 8-12 multifamily rental housing projects, as well as the potential development of 15-30 single-family homeownership units. Units constructed with Metro Bond funds will be maintained as affordable housing for 60 years, while existing units purchased and rehabilitated with Metro Bond funds will be affordable for a period of 30 years. For additional detail on the county's proposed portfolio, please see Appendix B.

Advancing Racial Equity

Washington County is the most racially diverse county in the state. The Metro Council and Washington County have made advancing racial equity a priority in the implementation of the Affordable Housing Bond Program. Decades of housing policy from the federal to the local level has contributed to disparate outcomes for communities of color in housing. People of color are much more likely to struggle with unaffordable housing, displacement and homelessness. Disparity in housing stability and affordability for persons of color is directly linked with economic disparity, as well as historic and systemic housing injustice through practices such as redlining. The implementation of the Metro Affordable Housing Bond Program provides an opportunity to advance racial equity and to meet the needs of historically marginalized communities.

The efforts and opportunities to address racial equity occur at many points in the implementation of the Affordable Housing Bond Program. The selection of project sites, inclusion of minority-owned contractors and workforce in building housing, formation of culturally specific partnerships for outreach and services, accessible tenant selection processes, and ongoing reporting of outcomes all provide opportunities to advance racial equity. The specific implementation strategies to address these issues that Washington County will employ are discussed in the various sections below.

In addition, Washington County, along with the cities of Hillsboro and Beaverton and HAWC, receives federal housing and community development funds from the U.S. Department of Housing and Urban Development (HUD) and is, therefore, required to periodically prepare an Analysis of Impediments to Fair Housing (AI). The last AI was produced jointly with the City of Beaverton in 2012 (Hillsboro began receiving its CDBG funds as a separate allocation in 2018). The new AI will be completed as part of the next Consolidated Plan update, which is underway currently and will be completed in 2020. The AI must "affirmatively further" fair housing according to HUD's *Fair Housing Guide* by:

- Analyzing and eliminating housing discrimination in the jurisdiction
- Promoting fair housing choice for all persons
- Providing opportunities for inclusive housing occupancy patterns
- Promoting housing that is structurally accessible and usable by all people, regardless of ability
- Fostering compliance with the nondiscrimination clauses of the Fair Housing Act

The 2012 AI identified six Fair Housing strategy areas:

1. Awareness, information & training
2. Access to decent and affordable housing
3. Land use and zoning tools to promote access to opportunity
4. Overcoming linguistic and cultural isolation and serving communities of color
5. Overcoming disability-related barriers

6. Data collection and analysis

The above strategies identified in the 2012 AI are incorporated within the LIS.

II. Local Implementation Strategy Development

The development of the Implementation Strategy is based on review of recent studies and planning efforts that have involved diverse community members within Washington County, along with direct community engagement specifically addressing the Metro Affordable Housing Bond Program. Studies and planning efforts reviewed include:

- Metro's 2017 Regional Affordable Housing Inventory Database
- *2015-2020 Washington County Consolidated Plan* (housing needs assessment section)
- The Coalition of Communities of Color report, *Leading with Race* (particularly sections on housing justice)
- Metro-funded Southwest Corridor Equitable Housing project report
- Washington County's Aloha-Reedville and Aloha Tomorrow studies
- Housing need studies prepared for specific jurisdictions within the County, excluding Hillsboro and Beaverton (housing needs assessment section)
- Oregon Housing and Community Services *2019-2023 Statewide Housing Plan* (housing needs assessment section)
- Metro's *Tri-County Equitable Housing Plan*

Information from these studies and reports were used to develop various sections of this strategy. For example, the Metro Regional Affordable Housing Inventory Database is discussed in the Project Selection Process Section. It is important to note that in many ways the input and suggestions received through the County's community engagement process substantiated the findings from the above - mentioned studies and planning efforts.

Community Engagement – Phase I

During the months of February, March, April and May in 2019, the Washington County regional project team, which included staff from the County, Beaverton and Hillsboro, undertook extensive consultation with the community to better understand key issues and suggestions to addressing affordable housing within Washington County. To be most efficient, the project team opted to attend existing community and agency-based meetings to gain as much varied input as possible from a broad range of stakeholders. Every effort was made to approach all community engagement activities through a lens of equity and inclusion with special attention paid to gathering the perspective of historically underrepresented groups. Groups staff heard from included communities of color and individuals with the following lived experiences:

- Low-income
- Seniors
- Youth experiencing housing instability
- Physical disabilities
- Developmental disabilities
- Mental health concerns
- Addictions issues

- Limited English proficiency
- Immigrants and refugees
- Current or previous experience of housing instability
- Residents of low-income housing
- Justice-involved

The project team was able to hear from over 300 people including members of affected communities as well as individuals representing over 50 agencies (Appendix C), by attending existing meetings. At each opportunity the team provided a brief overview of the Metro Affordable Housing Bond Program and its impact in Washington County, and a description of the collaborative community engagement conducted between the three jurisdictions (cities of Beaverton and Hillsboro and Washington County). Opportunities also included facilitated discussions to answer the following questions:

1) What community-based organizations, service providers, advocacy groups, and communities should we connect with for input about Metro bond implementation strategies?
2) What are the things that are most important to you and/or your family when you think about where you want to live?
3) What do you think are the biggest challenges people have with keeping their housing?
4) What types of services, programs, and/or activities are needed to overcome these challenges?
5) What do you think are the biggest challenges people face when trying to find a place to live?
6) What is the best way for you to find out about available affordable housing?
7) Is there anything else you'd like to share about your experience or the need for housing in your community?

The table below outlines the community engagement opportunities that the project team attended.

Date	Stakeholder Group	Location	Total Participants	Agencies
02/07/2019	Community Housing Advocates	Beaverton	12	11
02/06/2019	Housing Support Services Network	Beaverton	57	42
02/13/2019	Washington County Resident Advisory Board	Hillsboro	20	
03/11/2019	Self Determination Resources	Beaverton	5	1
3/14/2019	SOAR Immigration Legal Services/EMO	Hillsboro	3	1
3/18-3/27	Homeplate Youth Services	(survey)	10	1
3/18/2019	Consolidated Plan Workgroup	Hillsboro	31	17
3/25/2019	Washington County Parole and Probation	Hillsboro	11	2
3/26/2019	Oregon Law Center	(survey)	15	1
3/27/2019	Community Action/CPOs Homeless Forum	Cornelius	43	2
4/4/2019	Community Action – Family Advocates & Housing Specialists	Hillsboro	15	1
4/12/2019	Centro Cultural/DAVS Seniors and Tribal Community	Cornelius	17	1
4/16/2019	Head Start Policy Council (parents)	Hillsboro	23	1
4/15-4/17 2019	Consolidated Plan Focus Groups (6)	Hillsboro	38	0
5/22/2019	Culturally Specific Behavioral Health Providers	Hillsboro	20	8

Learnings from Input Sessions

Input from all the engagement opportunities was compiled, coded and analyzed for key themes related to the following 5 categories:

- Barriers (46% of total)
- Service Needs (24% of total)
- Location (16% of total)
- Marketing (11% of total)
- Other (2% of total)

A summary of detail within each category is below.

Barriers

This category includes a variety of factors that prevent people from being able to secure or maintain housing. Specifically, these responses fell into one of the following categories:

- Cost (41%) – affordability of rent; application fees; costs to move; deposits; costs related to past rental history, criminal history, and credit history; and utility costs
- Screening Criteria (24%) – rental history; criminal history; credit history; citizenship status; and understanding what purpose screening serves and why it is necessary
- Navigation (12%) – complex system of finding and securing housing; complex application process; ability to understand and follow through with finding and securing housing; bureaucracy is overwhelming; mobility/transient nature of clientele
- Housing Needs (10%) – unit size; accessibility for developmentally delayed people; safety/livability of units; spaces not trauma informed
- Cultural and Trust (8%) – Cultural differences in understanding of norms and compliance; and fear or distrust about stability of housing, neighbors, environment

Service Needs

This category includes factors that are related to specific services that could be offered onsite or ways in which services could better meet the needs of tenants. For the most part, responses were categorized as the following:

- Education (25%) – skills building for self-sufficiency, housing sustainability; vocational training and mentorships; and renter education related to navigating the system, understanding tenant rights, and compliance with rules
- Service Alignment (22%) – coordination between community-based organizations, agencies and other service providers; coordination of services specific to families and seniors;
- Addictions/Mental Health or other Case Management (15%) – onsite mental health and addictions services as well as case management for others who need that level of support
- Other mentions included accommodations within the physical space such as community rooms, common space, and storage space

Location

This category includes specifics about where housing is located, proximity to things people may need to thrive and the environment in which housing is situated. Responses primarily fell into the following groups:

- Services (24%) – proximity to grocery stores, employment, medical providers, and other supportive services
- Safe/Sense of community (45%) – good schools; sense of community; and safe, quiet, walkable neighborhood
- Transit (17%) – close to public transportation; and accessible for special needs transportation (LIFT)
- Other comments included equitable distribution of housing in mixed-income areas with broad geographical dispersal

Marketing

This category was specifically focused on how people hear about housing and considerations in how to share information about housing with communities. This was a much smaller number of comments that predominately focused on sharing information through community-based organizations and other word-of-mouth opportunities as well as communicating information in multiple languages and formats.

Several significant policies outlined in this Local Implementation Strategy were developed or impacted by feedback received through the county's community engagement work.

Key Feedback Themes	Policy Impact
Barriers	Informed county's threshold project requirement of low-barrier screening criteria. Informed county's use of universal design as a competitive selection criterion.
Service Needs	Informed county's goal of 100 Permanent Supportive Housing (PSH) units.
Location	Informed county's housing development priorities related to projects near major public transportation and transit corridors. Informed county's housing development priority related to projects in high opportunity areas.
Marketing	Informed county's threshold project requirement for affirmative marketing.

During the public comment period of April 23rd through May 28th, 2019 for the first draft of the Local Implementation Strategy, written comments were received through a dedicated email address, and a public hearing was held during the 5/7/2019 Board of Commissioners meeting. Housing Services staff also met with the following councils and committees to receive feedback on this draft document:

- City Councils of Cornelius, Durham, Forest Grove, King City, Tigard, Tualatin, and Sherwood.
- Washington County Planning Commission, CDBG and HOME Policy Advisory Board, Housing Advisory Committee, and the Committee for Community Involvement.

In addition, Housing Services staff coordinated an affordable housing developer forum as well as a homeownership developer conference call to receive general feedback as well as to focus on issues of advancing racial equity, permanent supportive housing, and project selection criteria. Developers who participated in these two events included:

REACH	Specialized Housing
Community Development Partners	Community Partners for Affordable Housing
BRIDGE Housing	Community Housing Fund
Bienestar	Northwest Housing Alternatives
Cascade Housing Development	Sequoia Mental Health
Community Action	Buono Properties
CASA of Oregon	Innovative Housing, Inc.
DBG Properties LLC	Proud Ground
Habitat for Humanity – Metro West	

Detailed feedback from the forum and conference call, as well as from all community engagement work to date are included in Appendix C: Community Engagement Results. Staff were successful in reaching a broad range of communities of color and other historically underrepresented groups in a short timeframe. The community engagement process will continue to inform the implementation of the Metro Affordable Housing Bond Program.

III. Implementation Phase

Implementation of Metro Affordable Housing Bond Program is expected to occur over a period of five to seven years. During this period staff will identify sites, secure needed resources for capital and services, develop partnerships with developers and service providers, and construct housing.

During this period, it expected that community needs, and opportunities may change. New census data will become available, new community planning efforts will be initiated or completed (e.g. development of Washington County's 2020-2024 Consolidated Plan), and new resources or opportunities may become available while other resources or opportunities may not materialize as anticipated. In addition, certain framework goals may be easily fulfilled while others may prove more challenging. Because of the dynamic nature of this work, Washington County proposes to periodically review, and potentially reset, this Implementation Strategy.

Washington County will review the Implementation Strategy at a minimum of twice during the implementation phase. The first review will occur 18-24 months following the initial roll-out of bond funds. The second review will occur 48-60 months following initial roll-out of funds. Should these reviews result in modifications to the Implementation Strategy, the review process will include community outreach and engagement including to cities or other jurisdictions that may be impacted, review and amendment by the Washington County Board of Commissioners, and submission to Metro's Community Oversight Committee for review and recommendation for approval to Metro Council.

IV. Project Selection

Development opportunities, needs, and location priorities for housing will drive the selection of projects. Washington County will rely on ongoing relationships with jurisdictional partners and internal information from housing studies conducted by Washington County for the Office of Community Development and the Housing Services Departments to inform decisions. Washington County anticipates selecting projects both on a rolling basis and with targeted Request for Proposals (RFP).

Projects using Metro Affordable Housing Bond Program funding will be evaluated by how closely they meet overall targets regarding income levels and unit sizes as defined in the Metro Work Plan. Those projects that provide housing opportunities for the very lowest income, under-served populations and, provide family-sized units, particularly 3- and 4-bedroom units will be given priority. The amount of funding allocated to a project will be determined by the number of units at 30% MFI and whether the projects include family-sized units.

Needs

Washington County conducted a housing needs assessment in 2014 as part of the *2015-2020 Washington County Consolidated Plan*. The study identified the need for 14,000-23,000 additional housing units in Washington County for those at <50% MFI (2006-2010 and 2007-2011 Comprehensive Housing Affordability Strategy (CHAS) data. In addition, a housing needs analysis is currently underway for the upcoming *2020-2024 Washington County Consolidated Plan* planning process which will also use the most recent CHAS data from 2011-2015. This CHAS data will be used in the upcoming Consolidated Plan and is included here.

Affordable Housing Need – Washington County			
	<30% MFI	30-50% MFI	Total need <50% MFI
2015-2020 Washington County Consolidated Plan, Housing Needs Analysis	10,000-11,000	4,000-12,000	14,000-23,000
2011-2015 CHAS	**12,860**	**12,880**	**25,740**

As noted earlier in this document, a significant portion of Washington County's implementation area for the Metro Affordable Housing Bond is comprised of unincorporated communities. Because those communities generally do not have statistically recognized boundaries, it is challenging to determine housing need unless there are existing housing needs analyses for a specific community.

Needs information for jurisdictions within Washington County, using the 2011-2015 CHAS data, are shown below:

Affordable Housing Need, <50% AMI or Less			**Existing Regulated Affordable Housing**
Location	**Self-Identified**	**CHAS data, 2011-2015**	
Forest Grove*	~1,400 *Housing Needs Assessment and Recommendations, 2017*	355	560

	(written by City of Forest Grove staff, being updated currently)		
Tigard*	1,580 identified just in the Southwest Corridor area of Tigard in *The Southwest Equitable Housing Strategy, 2018*	2,898	949
Cornelius	-	325	126**
King City	470 *Housing Needs Analysis, March 2018 (Eco Northwest)*	65	0
Tualatin	-	1,865	604
Sherwood	292 *Housing Needs Analysis, December 2017 (Eco Northwest)*	390	123
Durham	-	145	210

*Two communities in Washington County, Forest Grove and Tigard, are categorized as rent burdened cities under the Rent Burdened Cities Bill (HB 4006). This legislation requires that cities of more than 10,000 people in which 25% of the residents pay more than 50% of their income towards rent must "hold at least one public meeting to discuss the causes of severe rent burdens and potential solutions…" and "requires these cities to complete and submit a survey to the Department of Land Conservation and Development (DLCD) and Oregon Housing and Community Services (OHCS) annually, reporting the number of permitted and produced residential units in several different categories." DLCD technical assistance funds have been allocated to selected communities to support new or updated housing needs analyses, code analysis, code audit, or housing strategy implementation plans. DLCD supported work must be completed by June 2019.

**81 units in Metro Database + 45 units at Cornelius Place (completed in 2019) = 126 total affordable housing units in Cornelius

Evaluation of Development Projects using Metro Affordable Housing Bond Funding

Washington County will use seven factors to evaluate housing development and the amount of funding that may come from the Metro Affordable Housing Bond Program. While all these factors are important, they are not listed in priority order below.

A. Jurisdictional and Area Partnerships and Geographic Dispersal. Jurisdictional and area partners involved in increasing the number of affordable housing units and who can also provide financial assistance (e.g. SDC/fee waivers or exemptions, density bonuses, property tax waivers, and other financial support), will be better positioned to attract developers due to the high cost of land and construction. However, Washington County will also encourage funding to be dispersed throughout the implementation area.

B. Housing Needs Data and Census Tract Analysis. As stated above, housing needs data will be used to locate affordable housing developments. Information regarding where affordable housing currently exists (from the 2017 Metro Regional Affordable Housing Inventory Database) will be used, as well as, GIS identification of language predominantly spoken at home, areas of concentration of low-income households, communities of color and people with disabilities to help identify development opportunities for new affordable housing units.

C. Land Availability and Cost. Because the availability of land and the cost of land can be an impediment to the development of affordable housing, potential developments that have site control will be highly evaluated. Appropriately zoned land offered at a fair market price will also be highly evaluated. However, when land is proposed to be donated, has the appropriate zoning and does not have any impediments regarding location (e.g. concentration of affordable housing, not near transportation or potential employment hub), this kind of opportunity will be positively evaluated.

D. Local Development Partners. The County will work in partnership with developers and owners who have prior experience in developing affordable housing including local for-profit and non-profit developers, including organizations designated as Community Development Housing Organizations (CHDOs). They must have a demonstrated track record of successfully developing affordable housing within the Portland metro area or be a local organization which have a proven track record providing resident services and are community-based. In addition, HAWC intends to be a developer or owner of housing funded under the Metro Regional Affordable Housing Bond Program.

E. Major Public Transportation and Transit Corridors. Areas within a quarter-mile of MAX or high-frequency bus lines as identified by GIS mapping will be given priority. This also includes areas with sidewalk connections to facilitate accessible use of transit.

F. High Opportunity Areas. High Opportunity Areas include sites located near transit (as defined above), jobs, high-performing schools, commercial services, parks and open space, and basic needs services.

G. Areas Identified by HUD (U.S. Housing and Urban Development) as Qualified Census Tracts (QCTs) and Small Area Difficult to Develop Areas (SADDAs). QCTs and SADDAs are areas where HUD has incentivized development of affordable housing; they allow for projects built in those areas to receive a 30% 'boost' in Low Income Housing Tax Credits (LIHTCs) that can be leveraged with Metro Affordable Housing Bond Program funds. These areas will be identified by GIS mapping.

Threshold Project Requirements

The implementation of the Metro Affordable Housing Bond Program provides an opportunity to address the needs of historically marginalized communities. To achieve goals of racial equity and to provide economic opportunities for minority-owned, women-owned or emerging and disabled veteran-owned small businesses, Washington County will apply threshold requirements for all developers and owners of Metro Affordable Housing Bond Program funded housing developments. These requirements include:

A. M/W/DBE/ESB Contracting. Consistent with prior affordable housing development projects in the county, Washington County is requiring a threshold utilization goal of 15% for

firms that have been certified by the State of Oregon as a Minority-Owned Business Enterprise, a Women-Owned Business Enterprise, a Disadvantaged Business Enterprise, or an Emerging Small Business (M/W/DBE/ESB) with an aspirational goal of 20%. The percentage target includes contracts related to project construction and development costs. Project sponsors will be required to provide documentation of contracting efforts and results. Currently, Washington County is studying its procurement process as a part of its equity, diversity and inclusion initiative. The 20% aspirational goal may be adjusted as Washington County completes the development of a corporate plan for purchasing, contracting, and monitoring through its internal equity, diversity and inclusion work. This goal will be reviewed while the LIS is being reviewed as mentioned in the Implementation Phase section of this document.

B. Affirmative Marketing, Tenant Selection and Lease-Up. Consistent with Metro policy, housing developed in Washington County using the Metro Affordable Housing Bond Program funding will serve communities of color, families with children and/or multiple generations, people living with disabilities, seniors, veterans, households experiencing or at risk of homelessness, and households at risk of displacement. Washington County will require that project developers and/or owners make units available to minorities and disadvantaged populations using best practice marketing strategies. In general, this will require:

i. Affirmative outreach and marketing to target populations. Developers and/or owners, and their property management companies (if applicable) will be expected to engage in proactive efforts to make disadvantaged populations aware of the availability of units, and the process and timeline for application. Washington County will work with project sponsors to identify specific target populations for each project and will review the proposed outreach and marketing strategy for each project.

ii. Washington County will require that project sponsors use low-barrier screening criteria that balances access to target populations, project operations, and community stability. This will be guided by the County's Housing Choice Voucher Administrative Plan screening criteria guidelines. Typical requirements may include less than standard market apartment income-to-rent ratios, reduced credit history requirements, and criminal history requirements that consider recent convictions with evidence that prior misconduct resulted from applicant's documented disability and that applicant has improved case management or other strategies to prevent similar future misconduct, evidence of successful completion of a drug treatment program or evidence of successful rehabilitation, including statements from applicant, parole or probation officer, employer, counselor, faith leader, or community member regarding the rehabilitation. Project sponsors will be required to review appeals to denials of standard screening criteria that take into consideration efforts of applicants that demonstrate stability and potential for tenant success. Project sponsors are also required to review appeals if the disqualifying aspects of a denial are related to a disability and make reasonable accommodations as appropriate.

iii. HAWC will use the project-based voucher (PBV) RFP process to leverage units with low-barrier screening. This will be completed by increasing the score for projects that commit to low-barrier screening.

iv. HAWC will monitor along with other funding sources that housing developments serve communities of color, families with children and/or multiple generations,

people living with disabilities, seniors, veterans, households experiencing or at risk of homelessness, and households at risk of displacement.

Competitive Selection Criteria for Projects

A. **Workforce Participation**. Washington County promotes workforce hiring of minorities, women and disabled veterans. Washington County recognizes the need to maintain and continue support for programs designed to develop adequate numbers of competent workers within the community for the construction industry. The county will work with partners such as WorkSystems and Metro to develop apprenticeship programs within Washington County that will benefit development teams for Metro bond-funded projects. Washington County will also participate in Metro's Construction Careers Pathways Project.

B. **Permanent Supportive Housing.** Washington County is committed to providing permanent supportive housing to the most vulnerable individuals and families in the community. To address the need for permanent housing in Washington County, the county will work with various agencies, local governments, non-profits and others to develop housing units in conjunction with the provision of services to allow an individual and/or family to be successful and thrive.

C. **Commitment to serving communities of color – demonstrated by culturally specific services to facilitate lease-up process as well as ongoing services.** Washington County will use culturally specific techniques such as marketing in appropriate languages, gathering places and use of social services providers. The county will require housing developers and sponsors to use marketing and outreach methods reach communities of color and difficult to house populations.

D. **Use of universal design principles.** Washington County will increase the number of accessible and visitable housing units for individuals of all ages and abilities. Use of universal design principles that enhance safety and access both at properties and within apartment units (in addition to accessibility requirements outlined in local community development codes) is important to this work. The intention of this criteria is to encourage the integration of design features that enhance the livability of the units produced in way that does not add substantial cost to a project. Some examples of design features include: reinforcements in all bathrooms to allow for grab bar installation as needed; door handles, safety devices for second or higher windows, cabinet pulls, and light switches that are appropriate for persons with physical limitations; lighting and interior color selection (paint and flooring) that is appropriate for persons with limited vision.

E. **Metro Bond Funding Set-Aside for Small Non-Profits and Community Housing Development Organizations (CHDOs).** A CHDO is a private nonprofit, community-based, service organization that includes community members on its board and develops housing for the community it serves. For the past 25 years these organizations have developed affordable housing within the county in a way that engages the local communities they serve. These are grassroots organizations and are active and integral to these communities within the county. They also play an important role in reaching difficult-to-house populations and communities of color.

Therefore, Washington County will set-aside $25 million in Metro Affordable Housing Bond funds for projects sponsored by small grassroots nonprofit affordable housing developers and/or a

CHDO based in Washington County. This set-aside is intended to provide support for projects developed by these organizations. If the set-aside is fully utilized, these small grassroots organizations are also eligible to request additional bond funds for affordable housing projects. This set-aside will be reviewed at the same time as the local implementation plan is reviewed. If the set-aside has not been utilized or is underutilized at either of those review points, any remaining set-aside funds may be returned to the full pool of bond funds and available for other affordable housing projects.

Sites Identified by Washington County

Metro will use a portion of the Affordable Housing Bond Program proceeds to fund and operate its Regional Site Acquisition Program. Additionally, Washington County will explore purchasing sites to develop affordable housing. Washington County will prioritize sites for purchase that assist in reaching implementation strategy goals. The County will take into consideration:

- the beneficial leverage of free or discounted land,
- opportunities to meet community development goals or the development of beneficial service partnerships; and/or
- opportunities to maximize use of 4% Low Income Housing Tax Credit (LIHTC) resources.

When there is opportunity to purchase property for the development of affordable housing, Washington County will consult with the local jurisdiction as well as other affordable housing developers to avoid any unintentional competition for the same sites. Washington County may develop and own the project or select a developer/owner to develop the site. In most instances, the county will use a Request for Proposals (RFP) process to select an affordable housing developer/owner for sites controlled by the county.

Sites Proposed by Private Non-Profit and For-Profit Developers

Washington County will accept unsolicited proposals from developers for projects and may issue Requests for Proposals (RFP) for projects expected to be funded by the Metro Affordable Housing Bond Program. Depending on progress toward Metro Affordable Housing Bond Program framework goals, proposals from developers will need to achieve specific targets for income levels, unit types, geographic area, racial equity, or other characteristics. Developer and owners will be required to work closely with Washington County Housing Services Department to ensure that their proposals are in alignment with the Washington County's Implementation Strategy.

Sites Identified by Metro

Metro Affordable Housing Bond Program funds include an allocation for land acquisition by Metro rather than by the implementing jurisdictions. Metro has allocated an estimated $12.9 million for acquisition in the Washington County Metro Bond implementation area. These funds will primarily be used to purchase sites within the county that further leverage Washington County's allocation of bond funds. Funds can also be used as a gap funding source and are an important component to the overall successful implementation of the Affordable Housing Bond Program in the county. The county is committed to working closely with Metro to identify appropriate sites for development that meet Metro's implementation strategy for acquisition. The county will also work with local jurisdictions in this process.

For sites that are identified within Washington County, a developer and owner will be selected by the county through a competitive process and working in conjunction with Metro.

V. Leveraging Other Affordable Housing Resources

The Metro Affordable Housing Bond Program is a landmark funding source for affordable housing in the tri-county region. With the leverage of state, federal and other sources of funding, the Metro Affordable Housing Bond Program provides an opportunity to substantially increase the number of affordable housing units that can be developed within a five- to seven-year period.

The Metro Affordable Housing Bond Program unit production goals are ambitious and, realistically, cannot only be accomplished using Metro Affordable Housing Bond resources alone. A combination of bond funds and both public and private funding sources will likely be required to meet unit production goals. The following principles that will guide Washington County's efforts to leverage bond funds:

A. **Maximize the use of non-competitive resources.** The 4% Low Income Housing Tax Credit (LIHTC) program is available on a non-competitive basis to provide equity for affordable housing development. This program is especially useful for larger projects or scattered site projects that can be bundled to achieve the scale desired by equity investors. Developing projects in Qualified Census Tracts (QCTs) or Difficult to Develop Areas (DDAs) maximizes the usefulness of the 4% tax credits. The 4% Low Income Housing Tax Credit (LIHTC) program differs from the 9% LIHTC program regarding timing of application and competitiveness. While Metro bond funds can be leveraged with either LIHTC program, the 4% program is highlighted here because it is non-competitive and available on a rolling basis throughout each year.

B. **Maximize use of private resources.** Some projects will generate enough rental income to make debt service payments on loans from private banks. While ensuring that projects have appropriate operating budgets and reserves, private debt should be secured for projects whenever feasible.

C. **Maximize local resources.** A variety of local resources may be available to support capital and operating expenses:

    a. **Project-based rental assistance.** This assistance will allow residents to pay based on their household income, while the project will receive a set rental income based on the Section 8 payment standard. This is a federal resource administered by HAWC and is subject to requirements outlined in 24 CFR 983. HAWC has set-aside project-based Section 8 assistance for 124 units to Washington County bond-funded projects. Some portion of these project-based Section 8 assistance will be committed to HAWC-owned projects and some will be available to other project sponsors.

    b. Property tax exemption. This assistance will lessen the overall cost of operating affordable housing developments. HAWC-owned projects are eligible for property tax exemption under the provisions of ORS 307.092(1)(b). Washington County also provides property tax exemption in unincorporated areas for eligible non-profit affordable rental housing under the provisions of ORS 307.540-548. Other jurisdictions providing property tax abatement for eligible affordable housing include the cities of Tigard, Forest Grove, Beaverton, Cornelius (senior properties with a PILOT agreement only), and Hillsboro.

    c. **Washington County HOME Partnerships Investment Program funds.** Washington County HOME funds are federal funds administered by the Office of Community Development. $6,748,771 is estimated to be available for development of rental and/or

homeownership units within the County over the next five years. Additionally, there is a 15% HOME set aside for CHDOs to support organizational operations.

d. **Washington County Housing Production Opportunity Fund.** The Housing Production Opportunity Fund (HPOF) is administered by the County Administrative Office and Housing Services Department. It is intended to support affordable housing development projects that encounter a gap in funding after receiving all other funds. In the 2018-2019 fiscal year, HPOF was allocated $1 million from the Washington County General Fund. The unspent HPOF funds are being rolled into the 2019-2020 fiscal year budget, with a recommended addition of $4 million to be included in next year's budget.

e. **Resources of partner jurisdictions.** The Housing Services Department will work closely with cities and other jurisdictions in their geographic target areas to identify local resources that can be contributed to affordable housing projects. This may include donated or discounted land, fee waivers or exemptions, grants, or other resources. An example of this is the City of Tigard's SDC exemption ordinance.

D. Seek other existing affordable housing resources (Federal, State and County resources). Washington County recognizes that despite the substantial amount of Metro Affordable Housing Bond Program funding and the strong commitment of resources from HAWC and Washington County, projects may have financing gaps that are best filled with other traditional affordable housing program resources. Sources such as the County HOME funds, the 9% Low Income Housing Tax Credit (LIHTC), State Document Recording Fee, Oregon Affordable Housing Tax Credit (OAHTC), and other funding sources may be needed to complete the financing for specific projects. Often, these resources include a state or region-wide competitive selection processes which can add time to the development schedule of a project. Washington County will also monitor ongoing legislation at the State level that might contribute additional resources for permanent supportive housing capital, rental and service funds. Washington County will work with funders in a transparent way to find the most effective and efficient path to bring these resources to bond-funded affordable housing projects.

E. **Support the pipeline of other affordable housing projects.** While much of Washington County's efforts during the implementation of the Metro Affordable Housing Bond Program will be focused on moving the pipeline of bond-funded projects forward, the ongoing availability of other Federal and State affordable housing resources means there is a likelihood of other projects moving forward during at the same time. HAWC will monitor the pipeline of projects being proposed and funded in the geographic area of this Implementation Strategy and will collaborate with developers to identify the most appropriate funding and other support that can be provided to those projects.

VI. Project Selection Criteria

Metro Framework

Washington County will take several factors into consideration in the selection of projects to be funded under the Housing Bond. The first consideration will be how each project contributes to the accomplishment of the Metro Framework, which was approved by voters in November 2018 as a part of Measure 26-199. Under the Framework, Washington County has the following targets:

Framework Unit Production Targets for Washington County (excluding Beaverton and Hillsboro)	
Total Housing Units Production Target	814
Target Housing Units with 2 or more bedrooms	407
Target Units for 30% MFI Households	334
Target Units for 31% - 60% MFI Households	399
Target Units for 61% - 80% MFI Households	81

To achieve these unit production targets Washington County expects that 8-12 affordable housing developments will be developed or rehabilitated. Washington County anticipates achieving these production targets in an overall portfolio of funded projects (Appendix B). It does not expect that each project will reflect the ratios expressed by these targets. This may result in the development of more than 814 to achieve these production targets. The large and diverse geographic area covered by this Implementation Strategy necessitates a variety of housing types and sizes that may differ significantly in development costs.

To achieve the goal of developing 407 family-size units, Washington County expects that most of the development projects will include units that are two bedroom or larger. The ratio of small to large units will be reflected in the target population for specific projects and characteristics of each site in terms of whether it is best suited to families with children or smaller households.

Washington County expects that most projects will include units for residents with incomes of 30% or less of the MFI. Housing units targeted to the very low-income resident may serve low wage earners, people with disabilities or other special needs, or people who have experienced homelessness. With the appropriate non-profit or for-profit organization skilled in delivering supportive housing with services, some projects may be designed exclusively to have 30% MFI units or have high concentrations of 30% MFI units.

Furthering Washington County's Affordable Housing Goals

In addition to fulfilling the Metro Framework, affordable housing developed with the Metro Affordable Housing Bond Program will also support Washington County's Department of Housing Services *2017-2027 Strategic Plan*.

Consistent with this Plan, Washington County:

- Will work to create housing opportunities across the geographic area of this Implementation Strategy. Included in the geographic area are the cities of Cornelius, Durham, Forest Grove, King City, Sherwood, Tigard and Tualatin and the unincorporated areas of Washington County that are within the Metro Jurisdictional Area.
- Will focus its bond funding on new construction of affordable multi-family rental projects.
- Will consider acquisition/rehabilitation projects to prevent displacement.
- Will support the development of homeownership units.

Racial Equity

Based on themes from *Leading With Race* by Coalition of Communities of Color, Washington County's approach to racial equity in project selection will consider factors such as:

- Increasing affordable housing in areas with existing underserved diverse populations, especially in areas that may be part of a redevelopment or urban renewal plan which could cause displacement.
- Providing new affordable housing in high opportunity neighborhoods and sites. These are sites that have good access to transit, jobs, quality schools, commercial services, parks and open space, etc.
- Supporting project teams that provide culturally specific resources and services. Washington County recognizes that culturally specific programs can achieve strong outcomes for diverse groups in the community. Washington County will prioritize projects sponsored by culturally specific organizations or projects sponsored by partnerships in which culturally specific organizations have a meaningful role in project design and operations.

According to the report, *Leading With Race*, disparity in housing stability and affordability for persons of color is directly linked with economic disparity, as well as historic and systemic housing injustice through practices such as redlining. Ongoing community engagement with culturally specific groups throughout the bond implementation period will further inform the project selection criteria.

Connection to Services

Washington County will require resident service coordination to be provided at all projects, appropriate to the level of need of the target population. Resident Services will focus on eviction prevention, helping residents access mainstream services for which they may be eligible, and community building activities.

Metro bond funds can only be used for development of housing, not for direct service costs. Projects serving high needs populations will require robust supportive services to ensure resident stability and positive outcomes. Washington County will work closely with its Department of Health and Human Services to connect developer-owners to public and private service providers in the community to create needed partnerships. Washington County will evaluate a project's target population and service plan to ensure that it is appropriate and sustainable.

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

Oregon Housing and Community Services (OHCS) *2019-2023 Statewide Housing Plan* identifies Permanent Supportive Housing (PSH) as a priority. According to that plan,

> *PSH combines lease-based housing affordable at extremely low incomes (less than 30% of the area median income) with tenancy supports and other wraparound supportive services to more effectively serve the most vulnerable populations, including people who are homeless or at risk of becoming homeless and people who are institutionalized or at risk of institutionalization. Properties providing PSH units offer social, health, and employment services for residents, helping to ensure long-term housing success. PSH is a*

> *key resource for people who, without support in their tenancy, may not be as successful in maintaining stable housing and who conversely, without housing, may not be as successful in using health care and other services to achieve and maintain recovery, health and wellness* (pg. 24).

Financial support from Metro helped develop the *Tri-County Equitable Housing Strategy to Expand Supportive Housing for People Experiencing Chronic Homelessness.* The Washington County Board of Commissioners received this report at its April 9, 2019 Work Session and expressed interest in implementing this strategy. The strategy provides recommendations to reduce chronic or long-term homelessness for people with complex health conditions through a scaled, blended service and housing system that provides flexible service dollars and ensures a stable, long-term stock of supportive housing adequate to meet the regional need. Based on current chronic homeless data and current unit inventory turnover rate, the report identifies a need for 226 units of permanent supportive housing in Washington County within the next ten years. As part of meeting the Metro framework unit production targets and the Washington County Implementation Strategy, the county is actively identifying experienced partners to collaborate with the county and other jurisdictions to deliver housing units with services to reduce chronic or long-term homelessness by establishing a goal of developing 100 affordable housing units to serve those individuals and families that need treatment or support services.

Project Cost Containment and Efficiency

A goal of Washington County is to support a portfolio of projects that provide the best return on investment of public dollars. These projects are characterized by efficient design and durable construction. They will use cost effective measures to facilitate efficient use of energy and water and select materials that create healthy living spaces. They will be designed to meet the needs of the target households in terms of space, amenities and service requirements, and are valuable assets in the communities in which they are located.

Washington County also recognizes that the ability to leverage various funding sources will vary from project to project. The blend and availability of funding sources will have an impact on both hard and soft costs. Hard costs include expenses associated with the purchase of land or projects and construction of projects. Hard costs will be impacted by development standards of investors, lenders and other public funders. Soft costs include expenses associated with financing, architectural fees, reports, System Development Charges and land development costs. Soft costs will vary with specific legal, accounting, reserve requirements, and fees. Leverage will also be impacted by the service needs of the residents.

Based on Meyer Memorial Trust's *Cost Efficiency Report* (October 2015), Washington County will evaluate all proposed projects to ensure that the costs are reasonable and appropriate to the specific project. This evaluation may consider:

- Scale appropriate to the target population.
- Scale appropriate to the community in which the project is located.
- Costs associated with design requirements of the jurisdiction in which the project is located.
- Costs associated with mixed use projects.
- Quality of construction materials.
- Costs associated with service needs of the target population.
- Reasonable fees and reserves.

Washington County will continuously monitor the overall pipeline of projects to ensure that the Metro Bond framework and Washington County Local Implementation Strategy requirements are being met.

Capacity/Readiness to Proceed

Washington County understands that the development of affordable housing differs in many ways from market rate housing or other real estate development. The county will partner with non-profit, private, or governmental organizations that have demonstrated skills as affordable housing developers and/or owners. Expertise with the framework target unit types and with the specific population proposed by a project will also be considered.

Timely implementation of the Metro Affordable Housing Bond Program is critically important. Washington County will prioritize projects that have a clear path to completion. For a project to qualify as "ready to proceed," the developer will need to have site control, appropriate zoning in place or a plan to achieve appropriate zoning within six months of endorsement from the County, have identified an experienced development team, and have secured needed service partnerships. While Washington County may not make a funding commitment until projects meet "ready to proceed" criteria, the county will begin conversations with interested developers at the earliest stages of pre-development to ensure that the housing development project aligns with the Local Implementation Strategy.

VII. Project Implementation

Review & Approval of Projects

Bond funded projects will go through a multi-stage review and approval process as follows:

- Washington County project initial review and approval. Before a project is forwarded to Metro for concept endorsement a project must, at a minimum, have site control, a preliminary development plan, preliminary estimate of total development costs, preliminary estimate of needed Housing Bond funds, and an identified development team. The Housing Advisory Committee (HAC) which provides advice to the Housing Authority Board of Directors (HABOD) regarding affordable housing and programs to ensure tenants are successful will provide input to staff regarding housing development projects suitable for Metro Affordable Housing Bond Program funding and located within the county bond implementation area. The Housing Advisory Committee is comprised of 15 members representing real estate, property management, finance, construction, design, planning, social service providers, minority and elderly groups, veterans and public housing residents.

  Staff will then provide a recommendation, based on input from the Housing Advisory Committee, to the Washington County Board of Commissioners.

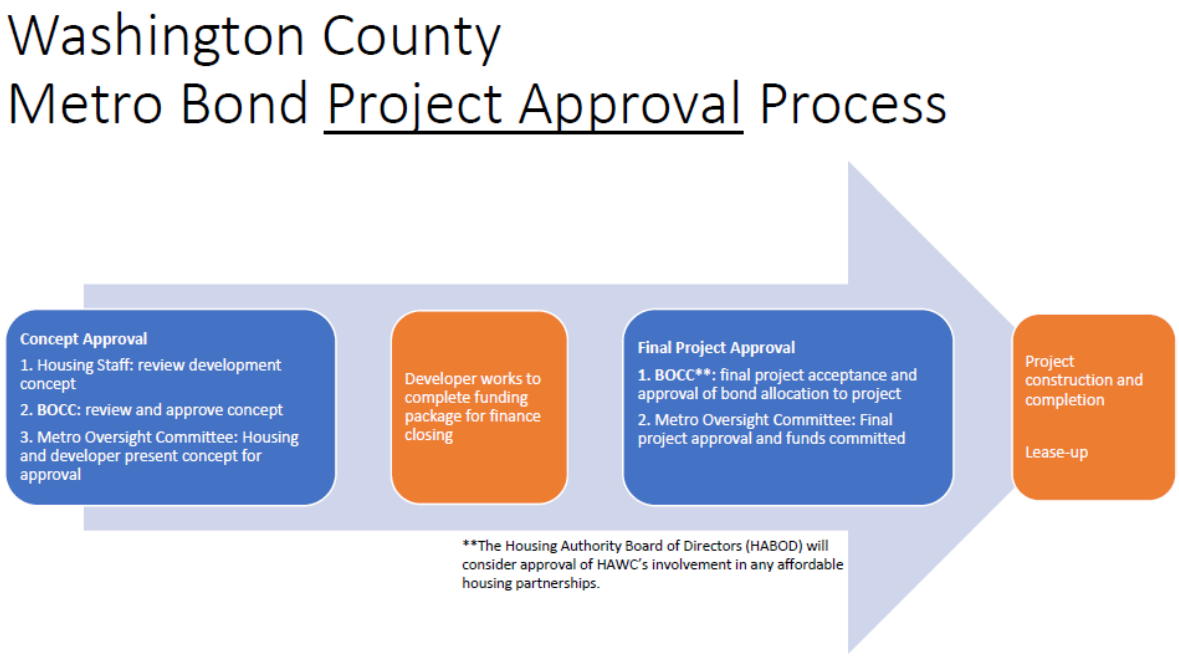
- Metro concept endorsement. County staff, in conjunction with Metro staff, will present the project to Metro's Community Oversight Committee which will review the project for conformance to the adopted Local Implementation Strategy and make a recommendation to Metro's Chief Operating Officer (COO) for endorsement.

- Washington County project approval and funding authorization. As the project sponsor completes due diligence and moves to finance closing, county staff will process the project approval by recommending the project for final approval to the Board of Commissioners.

- HAWC ownership approval. If HAWC is involved as a partner and/or in an ownership position in a project, the partnership request will go before the Housing Authority Board of Directors for approval. After approval by the HAWC Board of Directors, county staff will process the project approval by recommending the project for final approval to the Board of Commissioners.

- Metro project approval and funding authorization. County staff, in conjunction with Metro staff, will present the project to Metro's Community Oversight Committee for final approval and funding authorization.

- Release of Funds. Once a project has received approval by the Washington County Board of Commissioners and Metro, funds will be released from Metro to the Washington County Finance Department and disbursed to the project in accordance with the provisions of the project's legal agreements. During the construction of a project, the county will monitor the project to ensure compliance with project budget, specifications, and timeline (see *Project Monitoring* on page 27).



Project Closing

At project closing, the following will apply:

- Metro-Approved Regulatory Agreement. All projects will be required to execute a Metro-approved Regulatory Agreement that acknowledges the use of Metro Affordable Housing Bond

funds and the restrictions associated with the use of such funds. The Regulatory Agreement shall be recorded against the project at or prior to closing.

- Period of Affordability. The Regulatory Agreement will generally specify a 60-year period of affordability for new construction. For acquisition projects that are more than 10 years old, Washington County may consider a shorter period of affordability, but the affordability will be no less than 30 years. The Regulatory Agreement will provide a first right of refusal for qualified nonprofit organizations, for-profit organizations or government entities to acquire the project upon expiration of the affordability period for those entities to maintain affordability of the project. The period of affordability may be impacted by other funding sources in a project (e.g. LIHTC, HOME). Each project will adhere to the most stringent requirement for the affordability period. This may result projects having a longer period of affordability than required by the Metro Affordable Housing Bond.

- Accomplishment of Framework Targets. The Regulatory Agreement will also specify the level of affordability and the unit bedroom sizes of the project. While these requirements are memorialized in the Regulatory Agreement, affordability and unit bedroom sizes for a project will be determined and agreed upon by the developer, Washington County, and all funders at the time of initial funding commitment, well before completion of the Regulatory Agreement at closing.

- Jurisdiction Documents. Washington County may require other documents related to the project. Additional sources that leverage Metro Affordable Housing Bond funds, may require the following:
    - Development and Disposition Agreements. In the case of properties controlled by the HAWC, agreements relating to the transfer of property to the developer/owner will be required by HAWC.
    - Washington County will develop documents relating to how bond funds will be invested in a project. The type of investment may vary depending on the development's projected cash flow. For example, a housing development may require loans or grants to be dependent on the cash flow. In general, Washington County will support the allocation of program income to restricted reserve accounts dedicated to the provision of Resident Services. Projects that are expected to have more significant program income may have requirements for cash flow dependent distributions to the Washington County Housing Production Opportunities Fund (HPOF).
    - Washington County will specify requirements relating to implementation of Racial Equity Strategies. Strategies will be developed for each project and requirements will be documented in agreements with the County.

Project Monitoring

Projects will be subject to monitoring throughout the development process and period of affordability. The monitoring process and expectations will be documented in agreements with Washington County and HAWC. In general, monitoring will include:

- Monitoring During Development. Washington County will require monthly reports during the project development and lease up period and will conduct periodic site inspections in coordination with other funding partners to achieve on-time and on-budget completion. The Housing Services Department will approve all change orders and monthly draw requests.

- Lease-up. Washington County will monitor use of low-barrier screening criteria at projects funded by the Metro Affordable Housing Bond Program.

- During Operations. Washington County will require annual reports of developers, owners and property managers that include information about a project's physical condition, fiscal condition, occupancy, tenant income verification, and voluntarily collected tenant demographics. Washington County will conduct periodic site inspections in coordination with other funding partners.

Ongoing Community Engagement Plan

The completion and approval of the Washington County Local Implementation Strategy will initiate the beginning of Phase Two for community engagement related to the Metro Affordable Housing Bond Program's implementation. Phase Two is the long-term and ongoing community engagement directly related to planning, identification and development of affordable housing units. For this future effort, Washington County will contract with a community engagement practitioner to provide additional capacity to continue efforts to engage under-represented communities, neighborhoods living around new affordable housing developments and the community in general.

Washington County will work with the consultant to ensure that the ongoing community engagement will be timely, transparent, utilize plain-language principles, and include materials in all appropriate languages, and interpretation as needed. Community engagement will target three audiences:

1. Underrepresented communities – These are communities who have historically faced systemic barriers to affordable housing such as communities of color, people with low incomes, seniors, people with physical or mental disabilities, people involved with the justice system, people with limited English proficiency, immigrants and refugees, tenants of affordable housing, people at risk of displacement, and people experiencing homelessness. Engagement will focus on community members providing advice about how Washington County can address and reduce these systemic barriers. Strategies are more likely to be ongoing rather than one-time or time-limited and consist of both traditional and more diverse engagement methods and opportunities. These may include conversations conducted via existing meetings, in-person gatherings designed to exchange information rather than collect it, storytelling sessions, and may be supported or conducted by nonprofits and community groups that are trusted within the community.

2. Neighbors living in the area or adjacent to the new affordable housing developments – Engagement strategies will be focused on neighborhoods where a specific housing project is proposed. Strategies are likely to be both in-person and online and will be limited to the time before and during which the project is being developed.

3. General community members – Engagement with the general community will be less intensive than with the first two groups but will be ongoing during the 5-7 years. Strategies are more likely

to be electronic in nature and will focus on project updates and providing access to input mechanisms if desired (e.g., online feedback form).

To ensure that impacted communities are involved in decision making as much as possible, the community engagement consultant will:

- Maintain an interested and affected group contact list
- Promote, publish and share opportunities and updates widely and in multiple formats and languages as needed. This may include electronically, hard copy, social media, and by telephone (as requested)
- Provide trauma informed engagement opportunities and environments
- Ensure that engagement opportunities are accessible to all by being held in the evenings and/or on weekends, in different community locations and places where people naturally convene, and include community support such as food, child care and translation services

Ongoing community engagement will be based on expressed needs of the potentially impacted communities for each project. This will be influenced by needs identified in Phase One portion of community engagement activities that informed the development of overall implementation strategies; findings resulting from the Consolidated Plan community engagement process; outcomes of each community engagement process that occurs in relation to bond funded project identification; and the evaluation findings from the Phase One community engagement process. In addition to this information, the consultant will also work with stakeholders to identify preferred methods of engagement and utilize engagement strategies that are flexible, and fluid based on community and stakeholder input. The outcomes and findings from all community engagement will be regularly compiled and shared with project planning staff.

Washington County's community engagement planning and approach will be sensitive to communities who may not trust that their input will lead to meaningful and/or constructive change and that communities may be fearful engaging with government agencies. Planning efforts will incorporate techniques to address these potential barriers to receiving the community's input.

To gain and maintain public trust, Washington County will make every effort to develop ongoing evaluation measures that allow adjustments in response to expressed community needs/wants and expected outcomes as evidenced in participation demographics and quality of participation, as well as tenant demographics and outcomes in future affordable homes. Evaluation metrics include:

- Were you able to successfully reach the intended audience?
- Did people receive the necessary information they needed to make a relevant response?
- Did you choose the right type or level of engagement to match the purpose?
- Was feedback received from the community positive or negative?
- Did the community feel like they received proper feedback on the results of the engagement?
- Did they indicate they want to be part of a similar process again?
- If not, why not? And what could be done differently to make the process better, more inclusive, and more impactful?

VIII. Organizational Plan for Implementation

To be successful in the implementation of the Metro Affordable Bond Program, Washington County will use a combination of staff and consultants to meet the development goals and community engagement requirements. Washington County staff will be responsible for community engagement and outreach, project selection, project documentation funding processes, overall program monitoring and reporting. County staff will be responsible for the site selection, financial packaging and the development process for projects that HAWC will own. When expertise is not available within the county, consultants will be engaged with expertise in affordable housing financing and development to review proposed projects during the selection and commitment phases. Similarly, the county may engage consultants with expertise in construction management to help oversee development. Staff will also continue to collaborate with bond implementation partners within the County and throughout the region as appropriate to ensure that all Metro Affordable Housing Bond commitments are realized within the required time lines.

As mentioned at the beginning of this document, the Metro Affordable Housing Bond Program is a landmark effort to develop affordable housing in the tri-county region. To achieve the goal of developing 814 units of affordable housing in Washington County several county departments will be engaged in the implementation of the bond including Housing Services, Finance, Land Use and Transportation, Facilities, Community Development, and the County Administrative Office. Metro has committed $2,451,906 in administrative funding over five years to fund Washington County's costs to implement the Metro Affordable Housing Bond Program. The Finance Department has established a method to track all costs expended to implement the Metro Affordable Housing Bond Program. Annual reports will be provided to the Washington County Board of Commissioners and Metro.

IX. Reporting on the Washington County Local Implementation Strategy

Annual Report

Washington County staff will prepare an annual report to the Washington County Board of Commissioners on overall progress of the Local Implementation Strategy. This information will be made available to the public and interested stakeholders including cities and other jurisdictions that may be impacted using a variety of strategies such as published reports, newsletter articles and website postings and community conversations. The report will include information on committed and completed projects (e.g. project status, bond funding expenditures, total project(s) cost(s), and units produced by unit size, type and income level served). The report will also include information on overall progress toward achievement of the framework goals. When the LIS is updated at 18-24 months and at 48-60 months, new information gathered through the consolidated planning process and other sources will be used to update the LIS and will be reported in the annual report.

Reporting to Metro

Washington County will submit annual reports to Metro in accordance with the Intergovernmental Agreement.

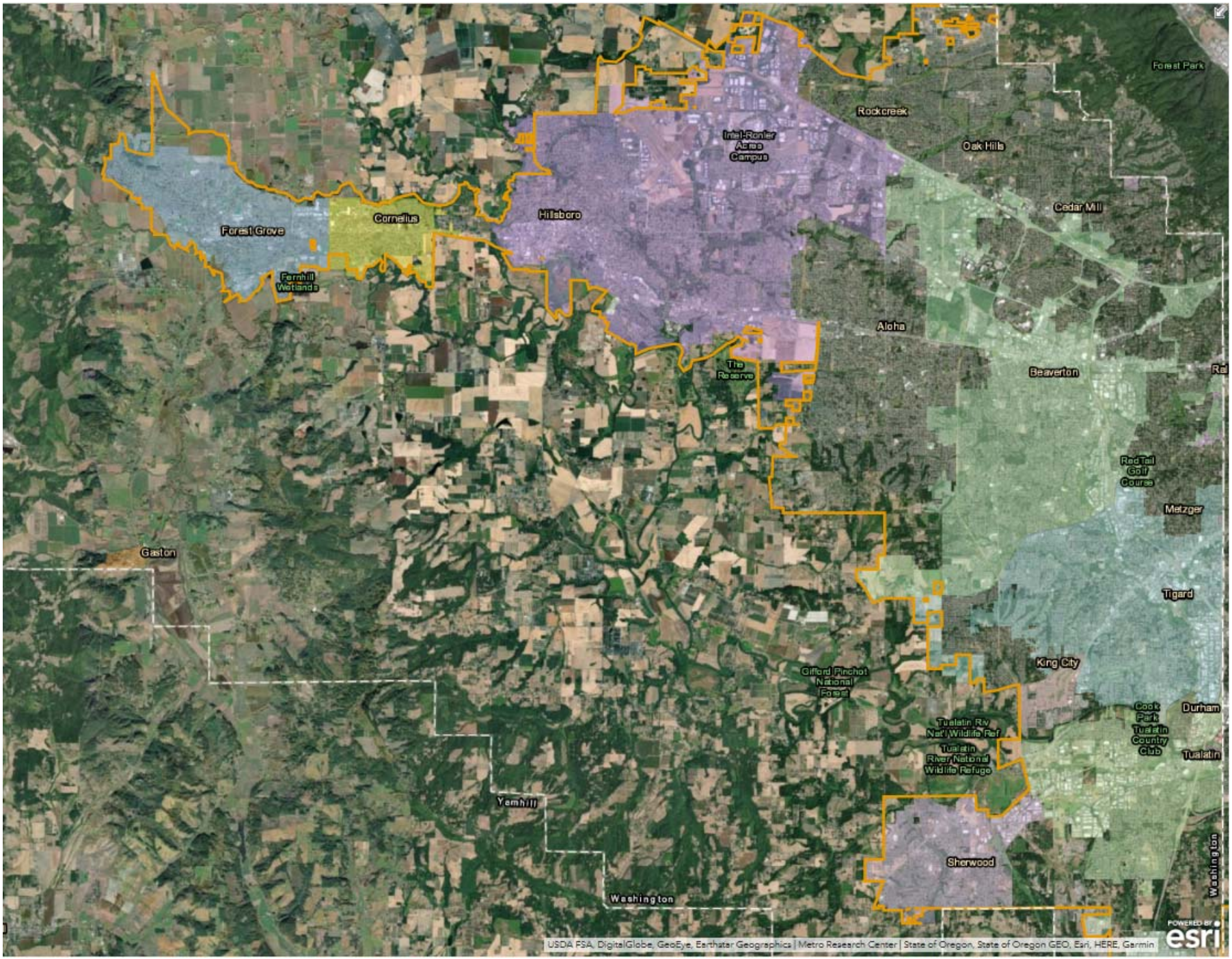
For more information or to provide comments please refer to:

https://www.co.washington.or.us/Housing/AffordableHousingBond/index.cfm

or contact the Washington County Housing Services Department at: 503-846-4795 or AffordableHousingBond@co.washington.or.us

Attachment 4 to Staff Report

Appendix A: Metro Jurisdictional Area in Washington County Map



Washington County Metro Bond Proposed Portfolio - For Illustrative Purposes Only 6/14/2019

Projects with site control

Project #	Total # of units	30% MFI units	60% MFI units	80% MFI units	Jursidiction/ Neighborhood	Target population	2+ bedroom units	Development Type	Total Metro bond funds	Anticipated Leverage funds
1	80	33	41	6	Tigard/ Tigard Triangle	individuals and families	40	New Construction	$ 11,440,000	$ 17,360,000
2	5	0	2	3	Unincorporated Washington County / Aloha	families	5	Homeownership - New Construction	$ 500,000	$ 750,000
3	68	23	45	0	Unincorporated Washington County / Cedar Mill	individuals and families	35	New Construction	$ 9,724,000	$ 11,084,000
4	175	70	105	0	Tualatin	individuals and families	70	New Construction	$ 17,500,000	$ 30,625,000
5	56	25	20	0	Tigard	seniors	0	New Construction	$ 6,720,000	$ 7,280,000
6	36	7	29	0	Forest Grove	individuals and families	28	New Construction	$ 4,388,364	$ 6,051,636
Subtotal	*420*	*158*	*242*	*9*		*Subtotal*	*178*	*Subtotal*	*$ 50,272,364*	*$ 73,150,636*
% of total goal	*51.60%*	*47.31%*	*60.65%*	*11.11%*		*% of total goal*	*43.73%*	*% of total goal*	*43.17%*	

Note: No funding committments have been made to any projects in this proposed portfolio.

Attachment 4 to Staff Report

Washington County Metro Bond Proposed Portfolio - For Illustrative Purposes Only 5/17/2019

Potential and/or anticipated projects

Project #	Total # of units	30% MFI units	60% MFI units	80% MFI units	Jursidiction/ Neighborhood	Target population	2+ bedroom units	Development Type	Total Metro bond funds	Anticipated Leverage funds
7	67	20	27	20	TBD	individuals and families	67	Acquisition	$ 9,581,000	$ 10,519,000
8	77	20	57	0	TBD	individuals and families	30	New Construction	$ 11,011,000	$ 15,939,000
9	72	15	57	0	TBD	individuals and families	35	New Construction	$ 10,296,000	$ 14,904,000
10	20	0	5	15	TBD	families	20	TBD	$ 2,000,000	$ 4,000,000
11	60	60	0	0	TBD	seniors - PSH	0	TBD	$ 11,508,168	$ 6,491,832
12	79	31	48	0	TBD	individuals and families	47	TBD	$ 11,297,000	$ 16,353,000
13	30	30	0	0	TBD	formerly homeless families - PSH	30	TBD	$ 10,500,000	$ -
Subtotal	*405*	*176*	*194*	*35*		*Subtotal*	*229*	*Subtotal*	*$ 66,193,168*	*$ 68,206,832*
% of total goal	*49.75%*	*52.69%*	*48.62%*	*43.21%*		*% of total goal*	*56.27%*	*% of total goal*	*56.83%*	

Grand Total - Combined Projects with Site Control and Potential/Anticipated Projects

	Total # of units	30% MFI units	60% MFI units	80% MFI units			2+ bedroom units		Total Metro bond funds	Anticipated Leverage funds
Total	**825**	**334**	**436**	**44**		**Total**	**407**	**Total**	**$ 116,465,532**	**$ 141,357,468**
Target	*814*	*334*	*399*	*81*		*target*	*407*	*Target*	*$ 116,465,532*	
Difference	11	0	37	-37		difference	0	Difference	$ -	

Note: No funding committments have been made to any projects in this proposed portfolio.

Appendix C: Community Engagement Results

During the months of Feb, March and April, the Washington County regional project team held listening sessions with the community to better understand key issues and suggestions for addressing issues related to affordable housing with Washington County. In an effort to be most efficient, the project team opted to attend existing community and agency-based meetings in an attempt to gain as much varied input as possible from a broad range of folks. Every effort was made to approach all of the community engagement activities through a lens of equity and inclusion with special attention paid to reaching the perspective of historically underrepresented groups.

The project team was able to hear from nearly 300 people representing over 50 agencies, as well as members of affected communities. At each opportunity the team provided a brief overview of the Metro Affordable Housing Bond and its impact in Washington County, and a description of the collaborative community engagement conducted between the three jurisdictions (cities of Beaverton and Hillsboro and Washington County). Listening sessions included facilitated discussions to answer the following questions:

- What are the things that are most important to you and/or your family when you think about where you want to live?
- What do you think are the biggest challenges people have with keeping their housing?
- What types of services, programs, and/or activities are needed to overcome these challenges?
- What do you think are the biggest challenges people face when trying to find a place to live?
- What is the best way for you to find out about available housing?
- Is there anything else you'd like to share about your experience or the need for housing in your community?

Housing Support Services Network, Community Housing Alliance, Community Action Housing Services Provider, Housing Specialists and Resident Advocates, and the Washington County Resident Advisory Board

Comprised of 104 participants including over 20 community members who currently live or have lived in low income housing, and representatives of 42 organizations serving culturally specific populations and/or individuals and families who are "at risk" of becoming homeless or who are homeless and may have special needs. This group was made up of individuals from diverse age range, racial, socio-economic, and ethnic backgrounds.

KEY FINDINGS: It's important to have housing in walkable neighborhoods, close to transportation and services. Cost is the number one barrier to obtaining and sustaining housing as well as screening criteria such as credit score requirements and restrictions due to criminal or rental history. Culturally appropriate services are needed to help navigate the affordable housing system as well as provision of mental health and substance abuse services. Use of community based organizations that people already know and trust was suggested.

When thinking about what is most important about where they live, participants cited:

- Walkability
- Close proximity to transportation and services such as grocery stores and community-based organizations
- Mixed income communities – not just a concentration of poor communities in one area

Barriers and challenges to finding and sustaining housing were identified as:

- Not enough affordable housing
- Waitlists are very long
- Strict screening criteria (no past evictions, credit score requirements and past criminal history restrictions)
- Mental illness and the need for additional support to maintain independent living
- Lack of housing for large families
- Inability to keep/have pets
- Difficulty to find housing with a criminal history
- Discrimination (ex. Application forms only available in English)
- Fear of working with government agencies such as the housing authority and disclosing information due to fear of deportation
- Affordable housing applications/process is hard to navigate – there's no consolidated list of all housing options

Service Needs identified include:

- Onsite substance abuse and mental health counseling/services
- Culturally appropriate service advocates
- Services for developmentally disabled
- Alignment and ability to share information (via shared database) between housing and service providers
- Tenant renter readiness/education program for homeless individuals to prepare them for sustaining housing and prevent evictions
- Advocates to help navigating the system
- Streamlining system to create one application versus multiple applications with multiple fees
- Create better system for finding out about housing – not just online
- Community based organizations need support to assist with communicating with property managers

SOAR Ecumenical Ministries of OR Immigration Legal Services, Oregon Law Center, and Centro Cultural (Cornelius)

Comprised of 24 individuals including 19 Hispanic community members for whom Spanish is their first language (with one session conducted in Spanish), and 5 service providers serving the Hispanic community.

KEY FINDINGS: Feeling safe in the neighborhood is very important (particularly safe from deportation). Cost is a huge barrier to finding housing as is screening criteria such as the requirement of a social security number. Culturally specific programs with trusted community based organizations are recommended to help people navigate the system, job training programs, and help with obtaining legal status.

When thinking about what is most important about where they live, participants cited:

- Affordable rent
- Walkable neighborhood – walking is key when issues with getting a license
- Close to public transportation – due to difficulties in getting a license
- Safe neighborhood – low crime/ where you can feel protected and not targeted
    - A strong desire to feel safe in their home was mentioned by every participant
- Close to services - trusted organizations
- Close to fresh, health food
- Close to good schools and parks
- Schools and hospitals
- A quiet neighborhood

Barriers and challenges to finding and sustaining housing were identified as:

- Lack of access to jobs with good wages due to legal status
- Not having a social security number
- Language, how to complete all the information required
- Childcare – costs are high and it's hard to find safe, reliable childcare
- A lot of immigrants work independently due to legal status which makes them vulnerable to low or no payment and no benefits – if you get sick you can't work and there's no paid sick time
- When there is an ICE raid at an apartment complex people will never go back and are fearful of seeking housing at many places that have a reputation for ICE involvement
- Access to financing
- I don't have them because I live with my son
- Asking too many requirements because many of us don't have many financial means.
- Cost -rent is very expensive for low income people like us.
- Not enough housing
- We need money to move to another place – deposit, move in expenses are very high
- Lack of loans
- Age and race discrimination
- No support/services onsite - just a place to live
- You have to stay working in agriculture to keep your housing but then you can't earn enough to save up for a down payment on a house, so you're stuck renting
- Rent increases each year, sometimes twice in one year, but you don't get raises to keep up with rent increases
- very long waitlists and they can't tell you how long it will be or if you will ever get an apartment
- In private apartments you don't have the protection of government run apartments - so the private landlords won't fix things and give 2 weeks' notice to move out

Service Needs identified include:

- People want to work with agencies/orgs. they trust, or that they know someone at or know someone who has received services there.
- When you don't have legal status it's very hard to navigate the system without any identification. There needs to be a way to complete required paperwork with an alternate ID.
- Assistance with water, electricity
- Building more housing for older people with low income
- Some money for rental assistance
- Programs to help with financial assistance that has fewer requirements
- Workshops about how to buy a house and financing
- Affordable payments
- More programs for people who speak Spanish
- Educations about the rights to obtain low cost housing
- Information about available options
- More help to complete applications
- A program that provides rent assistance when somebody loses his/her job

Washington County Parole and Probation and Bridges to Change

Comprised of 8 service providers serving those currently incarcerated or on probation

KEY FINDINGS: Housing near transportation and close to required services is important. Housing costs are a huge barrier as is screening criteria that prevents people with criminal history or past evections from renting. Onsite services such as mentor programs are recommended to help prevent eviction when relapse happens as well as assistance with job training and complying with court mandates.

When thinking about what is most important about where they live, participants cited:

- Close to public transportation with shorter trip times – so it doesn't take a long time (eat up a lot of your day) to get to treatment services, work, etc.
- Close to services - trusted organizations
- Near grocery stores – not in a food desert
- Away from Portland – for those in recovery they may want to be out of the city
- For those who are registered sex offenders they can't live near schools/parks
- For families – near schools

Barriers and challenges to finding and sustaining housing were identified as:

- Cost of housing is unaffordable
- Poor credit history or no credit history
- Criminal history – no one will rent to them
- Poor housing/rental history

- Those with arson records are very hard to find housing for
- Do not have the proper identification to apply
- Scarcity of options
- Complex application process – red tape
- Lack of support/patience with vulnerable populations on part of housing providers (specifically Washington County Housing Office – to help people get on waitlists)
- Deposits are too high even if you can afford the rent – no way to come up with 1st, last, and deposit
- Limit to number of people per unit- people with large families or families that want to pool their resources and share costs can't find housing that will allow them to live together
- Stigma – community judgement
- Lack of case management
- Discrimination
- Fears about losing housing – afraid to get it then lose it
- Undocumented – fearful of completing forms or unable to provide identification
- Finding housing options is difficult for service providers – addictions service providers do not have access to system that County and Mental Health use
- For those in recovery – relapse, if you relapse, which is part of recover, you're kicked out
- Mental Health – those who don't meet criteria for SPMI housing, however, need support
- Rent increases
- Utility costs – especially if hold on utility account
- Debt – can't pay rent and keep up with debt payments – court fees, etc.
- Mix of people, especially in shared living spaces – hard for people to get along
- Domestic violence/trauma history
- Housing unsafe – vulnerable populations don't know how to advocate or are fearful of advocating for safe living environments
- No housing supplies – basic furniture, dishes, etc.…

Service Needs identified include:

- Onsite services to help with relapse such as mentors, mental health, UA's onsite.
- Less restrictions regarding relapse – so people don't lose their housing if they relapse and seek help
- Community rooms onsite where people can meet with peers for support, hold meetings, etc.
- Housing Coordinator onsite who can help connect people with resources
- Connection with CBO's – allow onsite for services, coordinate to provide services for people living there
- Allow support animals and make more ADA accommodations
- Keep family, loved one's together – no housing where it's only adults or only male or female
- Skill building/education provided to teach people how to keep housing – how to clean, provide cleaning supplies, budgeting, work skills, etc.
- Utility assistance

- Financial education/skills – how to save – provide credit for attending trainings that goes toward deposits, utilities, household items, or other housing related items that help people get or stay in housing
- Case management
- For those with arson history – provide financial incentives for landlords to give them a chance and rent to them – same for those with sex offender records
- Pathways to progression through housing should be clearly identified – so that someone in an Oxford house situation knows how to take the next step and can then free up a bed for someone who needs that level of housing support. Currently people get stuck at certain steps with no idea of how to go to the next level of independent living
- Relationships with landlords are needed as well as neighbors so people aren't so intimidated to apply
- Online – easy access site needed with all housing resources
- Streamlined housing application processes are needed so people can do one application for multiple available places and get matched up

Self Determination Resources Inc. (SDRI)

Comprised of 5 service providers who serve people who have disabilities

KEY FINDINGS: Housing near transportation is essential. Screening criteria is a barrier to obtaining housing, particularly credit score requirements. Onsite services and assistance with move in fees are needed to help people get into housing.

When thinking about what is most important about where they live, participants cited:

- Build housing close to transportation – essential for DD population, also close to services, stores, etc.

Barriers and challenges to finding and sustaining housing were identified as:

- Adjust Property management companies screening criteria, requirements for credit scores, etc. are very high. They should also have training on working with underserved populations as they are often not respectful and not helpful for those seeking housing.

Service Needs identified include:

- Provide onsite or intensive services for job support, household support (bills, cleaning, financial management), medical needs (particularly for the DD population).
- Reduce the amount of deposits required for move in. Even when people can afford a place they can't get enough money together for the deposit, even for subsidized housing.
- Rent costs need to be drastically reduced, even reduced rent rates are too high.

- Create more subsidized housing; with voucher systems, when people participate in job skills programs and get better jobs, they can lose their benefits vs. subsidized where it's always a portion of your income so you won't lose your housing benefits completely.
- Create screening system/risk assessment for those with criminal record. DD clients have criminal history due to being taken advantage of, however, may not pose a threat/danger to anyone, yet they can't find housing due to criminal history status. Huge problem – described 2 stories of clients who were talked into using their credit cards to buy/sell things for friends that were illegal, or their computers/email accounts were used to commit fraud; they thought they were helping a friend.
- For DD population have coordinators in loop and allow them to give input into what criminal history actually is.

Homeplate

Comprised of 12 youth who are currently experiencing or who have experienced homelessness

KEY FINDINGS: Feeling safe and secure where you live is very important. It's very hard to afford housing, especially when you have limited education and can't get a job that pays enough to afford rent. Employment assistance and job training is very important for youth.

When thinking about what is most important about where they live, participants cited:

- Safe place
- Near transportation

Barriers and challenges to finding and sustaining housing were identified as:

- Cheaper housing with less restrictions and no extra fees
- Low on money
- Lower prices for houses
- Money
- Resources
- Roommate help, bill help
- Safe place
- Stable income and resource flow
- A place you can afford with a low income

Service Needs identified include:

- Build a shelter for everyone
- A job

- Stable employment and financial support/tutoring
- A place for teens under age 18 looking for their own place to live

Community Participation Organization (CPO) homelessness forum facilitated by Community Action

Comprised of 43 CPO and community members, held at the Cornelius Library

KEY FINDINGS: Housing close to services and employment is important. Gentrification has created rising rent costs that prevent people from being able to afford rent or buying a home. Onsite services are necessary and additional support for Seniors and the mentally ill are needed.

When thinking about what is most important about where they live, participants cited:

- Close to schools – (good/quality schools)
- Recreation – close to green spaces and parks, things to do
- Close to employment
- Close to medical services
- Close to affordable food options
- 1st mile last mile – no transportation gaps from home/work to bus lines
- Storage – access to temporary storage for those who rely on public transportation – so if you bring your backpack or groceries, there is a temporary storage place to put them while running errands, et…
- Safe neighborhood
- Close to public transportation with shorter trip times to services, work, schools, stores
- Close to services

Barriers and challenges to finding and sustaining housing were identified as:

- Employment – stable and living wage
- Lack of knowledge of land lord tenant laws
- Gentrification/Displacement – people priced out of their homes
- Rising Rent Costs
- Not enough available housing – even if you do have a voucher – no affordable housing available
- Lack of enforcement of housing laws
- Sex offenders can't find anyone who will rent to them
- Screening criteria
- Lack of knowledge of land lord tenant laws
- Move in costs (deposits/1st and last)
- Most places won't accept pets

- Very few options for large families – restrictions on number of people per unit
- Neighbors don't want low income housing in their neighborhood

Service Needs identified include:

- Onsite services - wraparound services, support services
- Collaboration with law enforcement – so LEA can work with service providers/case managers to assist with clients who are trespassing (for example) to prevent their clients from having a criminal record, which makes it even more difficult to find housing
- Case management
- Assistance with utility costs
- Services for Seniors
- Support for those with mental illness
- Education about renters' rights and housing laws

WASHINGTON COUNTY
OREGON

Date: May 7, 2019

To: Consolidated Plan/AI Work Group

From: Staff, Office of Community Development JWP

Subject: Focus Group Preliminary Results

To-date, four focus groups have been conducted. The groups our team has met with include Homeless adults at Sonrise (Jen Garner/Ann Hawkins), At-risk youth at HomePlate (Jen Garner/Ann Hawkins), Residents at Community Corrections (Jen Garner/Mari Valencia), residents with a mental illness (Mari Valencia/Ann Hawkins). We were not able to schedule the other two groups (elderly and disabled adults) so those will be planned at a later date.

Attached is a "topline" summary from Root in addition to the detailed notes from each session. One of the sessions was conducted by OCD staff so the format from those notes are different.

Jen Garner, from Root Policy Research will present on the focus group findings. She will be linked into our meeting via GoToMeetings.

Attachment

Office of Community Development
328 West Main Street, Suite 100, MS 7, Hillsboro, OR 97123-3967
phone: 503 846-8814 • fax: 503 846-2882

ROOT POLICY RESEARCH

MEMORANDUM

To: Washington County Consolidated Plan and AI team
From: Jen
Re: Topline thoughts from first round of focus groups
Date: April 24, 2019

To date, four resident focus groups have been moderated (three by Root, one by Mari):

- Homeless adults at Sonrise;
- At-risk and homeless youth at Homeplate;
- Residents serving time in Washington County Community Corrections; and
- Residents with mental illness served by Sequoia.

The focus group discussions underscored that the factors which contribute to homelessness and housing insecurity among Washington County residents fall on a spectrum, ranging modest cash shortfalls leading to eviction to family dissolution or disfunction to suffering from severe mental illness and substance use disorders (addiction and/or alcoholism). As participants discussed the type of housing situation that would best help them on a path to stability, their responses emphasized the importance of Washington County and its partners providing a diverse set of housing programs and supports ranging from rapid re-housing with no supports, to short term (less than 60 days) shelter with limited supports, to permanently supportive housing, and a range of options in between.

Homeless Adults

The adults experiencing homelessness who participated in the discussions currently camp or live in their vehicle. They are chronically homeless and all but one disclosed severe mental illness, addiction to opiates or meth, work-related physical disabilities, and/or mobility disability. Some are currently unemployable due to addiction and/or mental illness. Others have injuries that prevent working in their trade and need retraining. Some are unable to keep employment as a direct result of their homelessness (e.g., hygiene, no storage for personal belongings). Not surprisingly, a wide range of housing options, and movement from one to another along a spectrum of independence, from short-term transitional shelter to permanent supportive housing are needed.

Most are chronically homeless and camp or stay in their car

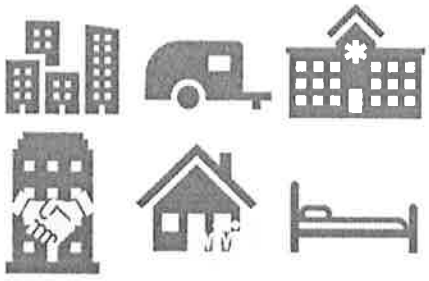
8 of 9 disclosed mental illness, addiction, and/or physical disability

Most have significant barriers to stable employment

Basic needs minimally met

Need for more frequent showers, hygiene opportunities

Storage for belongings during work/appointments, gas cards, and fresher food needed by some



Full spectrum of housing options needed along with range of services

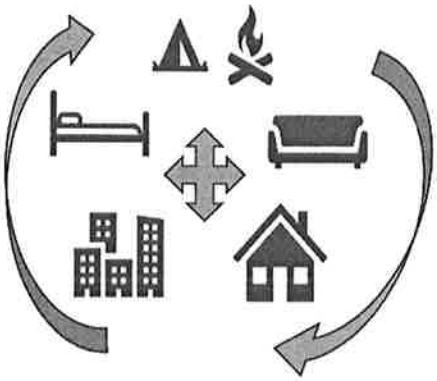
Some may require intensive treatment before housing placement

Some just need <60 days of guaranteed shelter to get on their feet

Source: Root Policy Research from Sonrise Homeless Adult focus group conversations.

At-Risk and Homeless Youth

The youth at risk of homelessness and homeless youth who participated in the discussions at Homeplate generally live in chaotic circumstances, moving in and out of homelessness, couch surfing, living with family, renting with friends, to camping or sleeping at youth shelters (as a last resort). Youth expressed the competing desires of wanting to live independently while needing skill development and support to achieve stability and grow into successful adults. Homeplate is a trusted resource and ideal location for service delivery. Support for expanded drop-in days/hours is desired and could be leveraged to further support these youth in employment, housing, financial, and life skills development.



Housing situations are chaotic, unpredictable, and short term

Most disclose dysfunctional family situations, some mention drug use

Most lack basic job readiness skills

Basic needs somewhat met

Hunger, drug environment, lack of personal safety prevalent issues

Strong need expressed for expanded drop in hours + services at Homeplate

Housing options should include varied degrees of independence/support

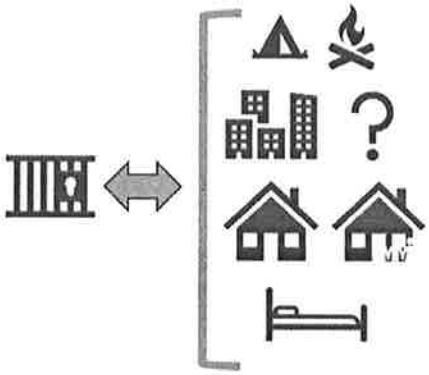
Need for tenant readiness, and other independent living skill development

Consider housing options for couples, parenting children, or peer groups

Source: Root Policy Research from Homeplate At-Risk and Homeless Youth focus group conversations.

Community Corrections

Participants in the Community Corrections focus group had a wide ranging discussion of housing choice, access to opportunity, law enforcement and prosecutors, and the extent to which Washington County's probation system hinders rather than helps their reentry into the community. Criminal history is the primary barrier to securing housing of choice, followed by the cost of securing housing (e.g., deposits, first and last month rent). Most did not express difficulty finding employment, but they did share that the mandatory, fixed, probation requirements, often led to job loss, as the newly employed must request time off to attend meetings, classes, etc. There is an opportunity to explore joint probation/housing programming that rewards progress toward goals and living as responsible, contributing members of society. This population needs hope.



Prior housing situations ranged from homeless to homeowner

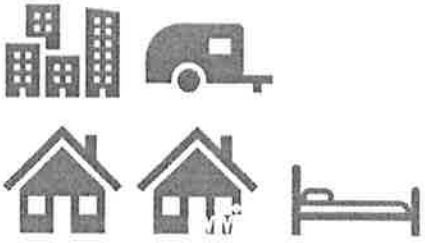
Many disclosed history of addiction, drug crimes

Criminal history and lack of training barrier to employment for some

Strict probation requirements at mandatory times and locations sets even the well-intentioned up to fail

Consider a probation incentive program rewarding positive progress

Need for treatment not jailtime



Criminal history = #1 barrier to housing choice, need "felon-friendly" options

Consider time-limited rent support to help the formerly incarcerated stabilize

Eviction prevention may be crime prevention for this population

Source: Root Policy Research from Washington County Community Corrections focus group.

Residents with Mental Illness

Residents with mental illness and/or a history of addiction participated in a focus group convened by Sequoia and included residents of peer-supported group living homes and residents of project-based subsidized housing with supportive services. All strongly value their case managers and the role the case manager plays in helping them live independently. With respect to supportive services and other program providers, participants described a need for training in trauma-informed care and increased knowledge of best practices in providing care to residents with mental illness. A number of residents expressed desire for the companionship of pets, suggesting a potential need for emotional support or companion animals. Educating this population about their fair housing rights and considering the therapeutic value of pets in housing program design is indicated.

Live either in peer-supported group home with services or in project-based subsidized housing with supportive services

All have a history of severe mental illness and/or addiction

Disability may limit employment

Case managers are critical to stability

Strengthen service providers' trauma-informed care skills and expertise serving residents with mental illness

Educate residents about fair housing rights, including reasonable accommodations

Most are satisfied with current housing situation

Monitor the extent to which people are living in the most independent, integrated setting

Residents prioritize housing that is safe, transit access

Source: Root Policy Research from Sequoia Mental Illness focus group facilitated by Washington County staff.

Focus Group/Pop Up Notes

If possible, try to organize your notes by category, to make it easy to scan and incorporate into the AFH.

Section III Feed Citizen Engagement

Group Location/Date/Time/Host

Washington County Community Corrections/April 17, 2019/10:15-11:45/Washington County Community Corrections

R/ECAP?

Demos: (approximate to the best of your ability)

of Attendees: 10

by race/ethnicity: 2 Hispanic, 2 African American, 6 White

by disability

by families w/ kids:

by language other than English (and the language)

Attendees: 10

Language: English

Typically under-represented population? Yes, people currently in Washington County Community Corrections, very low income, history or drug or alcohol addiction, prior criminal history

How recruited: The 10 attendees volunteered to participate in the focus group coordinated by Washington County Community Corrections. Each received a $20 WalMart gift card and refreshments during the discussion.

List of organizations consulted:
Washington County Community Corrections

Section V Feed Analysis

Current Housing Choice

Where they live, experience getting their place to live, why picked location, etc.

Participants discussed their housing situation prior to their arrest/conviction and the housing situation they expect to enter upon release.

I can't go home due to an open situation with a restraining order. I don't know where I'll go.

Maybe a hotel or motel. I was in a trap house when I lost my housing. I'll go into sober living.

I have a house.

I'm going to live with family.

I'm a homeowner, but I can't afford to keep my house. I'll have to sell it. I got it through the self-sufficiency program with Section 8 when I was working as a welder. I made good money. I can't do that any more.

I'm going into a Oxford house.

I'm going to Rinko, a transitional program for single moms.

I have a compound in the woods. I'm homeless, but I have a storage unit. I can couch surf if I feel like it. Because of my history with firearms and drugs, I have to work for cash under the table. I'd need $4,000-$5,000 to get into the place. I really just need a one bedroom, so I'm looking for a 5th wheel trailer.

I'm a felon, so that's it.

If you have a lot of felonies, you can get felonies off your record, but it costs a lot of money.

Housing is impossible if you have a record or are on probation or parole. The classes make it harder to work and your PO can just hit you with another class or another requirement.

There are no felony friendly (apartment) communities here. The property management or the HOA discriminates against us that way.

You have to take time off work to apply for housing.

You pay so many application fees, and you get denied and denied. By the end, you've maybe spent $1,000 on nothing but applications.

They won't disclose that they won't rent to felons. They say, they'll look at you as an individual, but they don't. Disclosure won't do it.

We need subsidized apartments. Maybe a way to step back in, make an effort, show that you're working and get on track. It'd be good to have a mentor to help stay on track. The mentor could help find housing and check in.

I'm trying to get out of my Mom's, but I'm still in the nest. Some felons are good people and hardworking. But, they see the felony only and it's bad.

They should take into consideration the type of felonies you have. And also, sometimes, the charges are just what you had to plead into. Do more research on the person.

Quintana Crossing has housing for a mix of people. We need more felon friendly housing by mass transit that's on a sliding scale. There need to be options for housing.

It (most helpful type of housing situation) depends on the individual. Because you don't know what their challenges are. Me, having my own place, it would feel like an achievement.

Jobs are so important, but sometimes they don't pay enough for rent and all the classes and UAs the PO requires. Before this, I had an apartment. I was $150 short on my rent, so I went out and got a package (of drugs to sell), and here I am.

Not all sober living are really sober living. I was in one and everyone was using. I couldn't stay clean there.

Or everyone else is dealing with their issues and it's crazy there.

For me, the #1 priority (for CDBG) is housing, rent supported housing. People are working and paying more than half their check to be here. When we line up for release, we should have a housing opportunity.

County Criminal Justice System—Law Enforcement, Courts, Probation

Include anything relevant to the County system

The system makes it so hard to stay on track. Instead of three years or probation, why not have incentives so that we can catch a break and boost our confidence, a reward system.

DOC should make sure they're following up with people who need housing. The PO should be a resource; everyone needs assistance.

There's been a huge shift in how POs treat people. They seemed more helpful, not lenient, but helpful.

I think it really depends on the PO. Not all of them have that attitude.

What if we created incentives for people to be on the right path and stay on the path. Like expunging felonies. Wipe them away with the understanding that if you go back, the felonies are back.

Certain counties have Clean Slate. It should be expanded to all counties. In OR we can do more to give people HOPE that the past won't always keep them down.

In Washington County, the Das and the judges are toughest on Blacks and Hispanics.

One and a half years ago, I went to see my PO and my exes [relative] works in [criminal justice.] I posted bail, and the [relative] had called ICE on me because I'm Hispanic and he thought I was illegal.

I know other Hispanics who went to see their PO and that got took from ICE.

Washington County is the worst on the racial thing. People say, 'it's good to be white in Washington County.'

Washington County does probation different (than other counties in Oregon). Judges hit you with anything they can and the probation is much more strict.

If you drive in Washington County, you see less homeless, and that's because the county chases them into Portland.

If people are trying to do their best (comply with probation), and they're going to the drug classes, if the bus is late and you miss a class, even if you call your PO, you're back in and you lose your job and your home, again.

DAs are strict. There was a pipe in my car, that wasn't mine, I've been clean for two years. But there weren't any drugs, just a pipe, and I got a felony possession charge for something in a car that wasn't mine.

Washington County has a 98% plead rate. They put so much freight on you that you have to plead, because if you try to fight the case, they put so much on, you'll never get free, so you plead to whatever.

I paid $3,000 for a lawyer to fight misdemeanors and I got 6 months and white guys get 30 days. (Hispanic respondent)

The Washington County DAs are the worst; they want nothing but maximum penalties.

I was going to school and working, when I got picked up, and the judge sentenced me here. If I'd been able to get probation, I could have kept my job and my spot in school.

You spend your life chasing the paper (complying with probation).

Examples of Housing Discrimination

Include anything that seems like direct housing discrimination

With respect to housing discrimination, the group did not think their race or ethnicity was a barrier, just their felonies. They discussed discrimination on the basis of race in the context of employment.

Access to Proficient Schools

Include anything about neighborhood schools/school choice, etc

Access to Transportation

How do they get around? Are they able to get to the places they need to go? What challenges do they experience?

A lot of classes, like the drug treatment classes, and POs are in areas that don't have access to transit. If you don't have a car or a ride, you can't get there. And then you pay the price.

Access to Services

Include anything related to health and human services

LifeWorks, CODA and NARA are places to go for mental health and addiction

We do need to deal with mental health and give financial support when people put in the effort.

People with addiction, it's hard to get clean.

You've got to stay in meetings (12 Step).

You can call Community Action for help. You can take them final notices on rent or utilities and they'll help you out. But you can only do that in limited amounts. Once every six months.

Where else can you get help?

CR

House of Hope

Sonrise

Homeplate helps with everything, but you age out.

What if you could get more funding, resources, if you're trying to be successful. I don't want a handout, I want to prove I'm working hard and can show proof of that, then maybe you could get more help.

They (County, service providers) should have a solid team of five or six people that canvass in certain areas to let people know about the help available. Like 185th and the [TIB?] Highway or 185th and Baseline.

We need a community center with mentors to help get people out of gangs, drug addiction. I'm trying to be a mentor, because I've left that life behind. I left that life in L.A. If we had people, mentors, who had been through shit but got beyond it, and are successful, that's the help we need.

Think about Community Revolution in Progress (acronym for CRIPs), taking that past and building it into positives and getting back into the community. If they really want it, support them.

My #1 priority is drugs. With drugs comes crime, with crime there's no hope, no dreams. Only a limited amount of people can get help getting clean. The majority of people across the street (in County jail) are drug addicted. Addicts are TRAPPED. We need more programs and more people to help put them in a place where they can get clean, not where they stay lonely, depressed and desperate. Instead of jail they need treatment.

Access to Employment

What is their experience related to employment? Able to get a job? Need training for a better job? Are there good jobs close to where they live?

We really try to do our best and get a job. But because the PO says you have to go to certain classes, you lose your job. You feel like my life is over and I can't succeed.

Or you don't have a phone and you can't call in or it broke or you got burnt, you're back in.

I've got a son, and I want to show him a different way.

A mentor could help with employment that's not limited; help guide us to a career that we can have even with a felony.

I feel limited [in job prospects] by my tattoos. [Face/neck in particular]. I really need help with employment, because people look and me and don't hire me.

GLIS is an employment agency, they're felon friendly.

My #1 priority (for using CDBG) is jobs. The #1 thing is to get working.

Show that there are still careers that are felon friendly. Give that hope.

White and Asian owned family businesses look at me, they see a big black guy with tattoos, and they won't hire me, even though I have credentials. They want to hire someone who looks like them.

Access to Low Poverty Neighborhoods

Is the neighborhood safe? Access to good quality fresh food? Sense of community? Other indicators of a healthy mixed income neighborhood? Access to park and recreation facilities? Libraries? Other public amenities?

Drugs and addiction are the problem. *(Most of the participants have a history of drug addiction and distribution.)*

There's so many trap houses—once you come in, you can't get out.

Access to Environmentally Healthy Neighborhoods

Include anything related to environmental quality, both in the neighborhood and within a home or apartment building (e.g., mold, bed bugs, etc)

Fair housing capacity and resources

Include information about how accessing fair housing resources; if these are working and/or other resources are needed

Section VI Feed Goals and Strategy Recommendations

Example from Westwood group: We need a fund, or a community coop, where we can help each other pay rent when we need help, help each other purchase a home.

Moderator ideas/solutions brainstorm:

- xxx

Quotes:

Example from Westwood: "We don't want more housing if it is small apartments. We want our children to be outside playing, to be creative, to enjoy nature."

Focus Group/Pop Up Notes

If possible, try to organize your notes by category, to make it easy to scan and incorporate into the AFH.

Section III Feed Citizen Engagement

Group Location/Date/Time/Host

Homeplate At-Risk and Homeless Youth/April 16, 2019/3:00-5:00pm/Homeplate

R/ECAP?

Demos: (approximate to the best of your ability)

of Attendees: 9

by race/ethnicity: 1 African American, 1 Hispanic, 7 White

by disability:

by families w/ kids: 1

by language other than English (and the language)

Attendees: 9

Language: English

Typically under-represented population? At-risk and homeless youth

How recruited: The discussions were held at HomePlate during drop in hours. Interested youth participated and received a $20 WalMart gift card, a $10 McDonald's gift card. All youth at the center had the opportunity to create "go bags" with food and hygiene items.

List of organizations consulted:
HomePlate

Section V Feed Analysis

Current Housing Choice

Where they live, experience getting their place to live, why picked location, etc.

I'm not homeless anymore. My family got a two-bedroom apartment for the five of us, plus our dogs and pigs. DHS helped us get the apartment. I went to Southridge Highschool, and I should be off probation by summer. I'm thinking about going into the Job Corps. I have a brother who's a junior at Beaverton and a sister in the sixth grade. DHS pays 70 percent of our rent for a year. For the longest time, DHS wasn't doing anything, then, they decided to help.

We stay at a (youth/young adult) shelter in Portland. The shelters for people, you have to worry about safety. In the Portland shelters, there's drugs, violence, and they're scary.

I've lived in Aloha my whole life.

We (family) used to live in an apartment for $700. Over five years, the rent went up to $1,200. We got an eviction. We couldn't afford to pay 1 months rent, and we were homeless. I think it was also harder because we're weird and don't get along with other people.

A lot of transitional housing programs and shelters don't allow couples, so there's no one to really help us.

There should be better circumstances for the homeless. There should be better, safer shelters. Maybe where they evaluate people before they come in.

Although, sometimes, at the door, people seem nice, and then in the night they start screaming.

The place we stay is self-run, so if you want to be on the staff, you say you want to be on the staff or you do security shifts out front.

At adult shelters, people talk a lot of shit about things they've done. Youth shelters are more calm.

We're distant from adults. Kids need more guidance. I think people 18 to 30 or 25 should be separate from the older, more hard core people.

I usually stay with friends. They let me crash with them. A shelter is the last resort.

The first time I was homeless, I was homeless for almost a year. I was outside in Beaverton. Beaverton has a squad for bike police that looks for the homeless to bother them.

They should tell the police to back off.

It's illegal to be homeless here (Washington County). They passed a new law, that if you're sleeping in Beaverton, Hillsboro, Aloha, it's illegal. The police are trying to chase the homeless into Portland.

They chased me into Portland. I was sleeping, in a tent, and in the middle of the night a crazy guy literally set me on fire. I have scars all over my back from it.

There's really no place for youth. Safeplace is difficult to get into, and you can only stay until you're 19. Then, you can't stay there.

I'm almost 18, and I'm planning on renting. My grandma will give me a six month lease.

I'm 18. I live with roommates, and I struggle with money.

I live with my folks, for now, but that's changing soon.

I got kicked out, this time for good, and I'm couch-surfing. I have no income since my Mom got me fired from my job. I'm looking into getting money to save to get an apartment and get my life together.

Saving up money for rent is hard. Then, when the rent is due, I don't have the money. I need a loan. .... You should go to a bank and talk to a financial advisor. Now that you're 18 you can get a loan.

No one wants to go to shelters or transitional programs. I want to be able to do whatever I want.

My sister's boyfriend has an apartment and he has four roommates and seven people total in a two bedroom. They're getting kicked out for too many people.

I want to get a house so no one has to sleep outside.

I don't want to be alone. I want to live with a group of friends.

I want to be able to do what I want to do and not be judged. But it isn't always that simple.

I looked and found out how much people can play. I found a place for $250 because you can share a room. But, I had to pay a second deposit.

Housing is the biggest need for people like us. And trying to find the options for help. Multnomah County is scary and ruthless.

I'm living in Hillsboro with a friend from high school who has his own place. He's cool and is letting me stay there.

It's hard to rent with no rental history. Once you can keep a job, you could get a room in a house maybe and start to build a rental history. Then I can get an apartment. I used to pay my Mom $200 a month, so I'm used to paying rent.

I'm in really unsteady housing right now. I had a baby and was living with his parents and he went to prison. Then I lived with a boyfriend, and have moved around since. My clothes are all in other people's houses. I'm getting evicted from the house I'm staying in now. I want to have enough money to be with my son—my mom has custody—and live on my own.

I aged out of the shelter, so I moved in with roommates. My roommates invited people over, and they fought, and it got physical, and the neighbors complained, so we're getting evicted.

Examples of Housing Discrimination

Include anything that seems like direct housing discrimination

Access to Proficient Schools

Include anything about neighborhood schools/school choice, etc

When school doesn't work out anymore or that you just have so many family problems that school doesn't make sense, you're on your own. You can't get a job, you can't get a GED.

Access to Transportation

How do they get around? Are they able to get to the places they need to go? What challenges do they experience?

Access to Services

Include anything related to health and human services

If you go to Portland, you can ask anyone and people will tell you where to get help and give resources like food. They gave me a street routes book that had all the shelters and resources in it.

I have a felony. Outside/In will help me do a six month class, so that no matter what the felony, I can get a place to rent. The Rent Well program.

We need more one on one help—for housing, jobs, mental health.

Mental health is a big issue. Drugs, bad relationships too.

HomePlate needs to be open longer. Just 2 to 5 is too short. I wish there were more hours. It would be great to be able to come every day. We could get help, just hang out, or have a safe place to sleep for a while.

We should be able to drop in more often, for longer.

We could get more help, a little sleep.

If it (HomePlate) was open 9-5 people really could sleep.

The (HomePlate) Outreach Workers are amazing. With their green backpacks. I met them on a really hot day. They came up and asked if we wanted some water and gave us a card. They were really cool and really consistent.

You can have someone to talk to here.

I like that they approached us. I hate asking for help.

They have activities too. We went on the coast trip. I hadn't been to the ocean in so long.

We need a place that's like the Boys and Girls Club, but for people our age.

At HomePlate, they have compassion, they understand, it's safe, and you can get a shower and get help. We could use more help with housing, food, financial—how to pay bills, save money, get jobs....and keep them.

I don't have a lot of experience with the County, but I hope they will be more open. They should be more open because people have a lot of issues and resources they need. Most of my experience with the County has been with the police or DHS. They're a little uptight. I have gotten in trouble with the cops though. I don't think a lot of people know about the County. Maybe if they would come around and talk with us more? I'm pretty hopeless. We don't have outlets, maybe there are resources, but I don't understand what they are.

Access to Employment

What is their experience related to employment? Able to get a job? Need training for a better job? Are there good jobs close to where they live?

I want to get my felony cleared so that I can join the Marines.

I don't have any income. I with there was a program for maintaining a job. It's hard for our generation, because we just want to do our own thing, so I may be scheduled to work, but I don't go because I want to do something else.

We need mental health and help to get better lives. Especially towards (job) training for the homeless.

We need income and to learn how to maintain a job. I used to work at Taco Bell, but if I want to go out and have fun, I don't go to work.

It's a generation thing.

It's not hard to get a job. You have to work at it, and you have to show up and work.

Because I don't have any work experience, I can't get a job. I've applied everywhere and everyone has turned my down. I know I have to get a job before I can get housing. HomePlate is the biggest resource our group has.

Access to Low Poverty Neighborhoods

Is the neighborhood safe? Access to good quality fresh food? Sense of community? Other indicators of a healthy mixed income neighborhood? Access to park and recreation facilities? Libraries? Other public amenities?

There need to be more family activities in downtown Hillsboro.

Drugs are a really big issue, and hunger, and homelessness. They should spend the money (CDBG) on that.

Access to Environmentally Healthy Neighborhoods

Include anything related to environmental quality, both in the neighborhood and within a home or apartment building (e.g., mold, bed bugs, etc)

Fair housing capacity and resources

Include information about how accessing fair housing resources; if these are working and/or other resources are needed

Section VI Feed Goals and Strategy Recommendations

Example from Westwood group: We need a fund, or a community coop, where we can help each other pay rent when we need help, help each other purchase a home.

Moderator ideas/solutions brainstorm:

- xxx

Quotes:

Example from Westwood: "We don't want more housing if it is small apartments. We want our children to be outside playing, to be creative, to enjoy nature."

Focus Group/Pop Up Notes

If possible, try to organize your notes by category, to make it easy to scan and incorporate into the AFH.

Section III Feed Citizen Engagement

Group Location/Date/Time/Host

Sonrise Project Homeless Connect/April 16, 2019/11-1/Sonrise

R/ECAP?

Demos: (approximate to the best of your ability)

of Attendees: 9

by race/ethnicity 7 White, 2 Native American

by disability 8

by families w/ kids

by language other than English (and the language)

Attendees: Washington County homeless residents participating in shower and meal program. Most of the participants shared that they have an addiction (meth, heroin) and/or mental illness; one had a mobility disability. All had a long-time history of living in Washington County, and six of the nine grew up in the area.

Language: English

Typically under-represented population? Yes

How recruited: Program participants were invited to participate in one-on-one or dyad discussions; each received $20 gift card and could prepare a "go bag" of food, water, and hygiene supplies

List of organizations consulted:
Sonrise Project Connect

Section V Feed Analysis

Current Housing Choice

Where they live, experience getting their place to live, why picked location, etc.

Sonrise Staff perspective: Sonrise operates the County's Winter Shelter; this winter they served 400 individual guests. Significant barrier for many participants is disability and being unable to

work due to the disability. People don't receive enough money from disability benefits to get into housing. There is a mental health crisis, and the Hawthorne walk-in clinic helps with that. Because of mental health issues and addiction, not all people succeed in the same types of housing arrangement. Some really don't do well in shared or group housing. Felons have the most difficult time getting into housing, even if they're working and can afford to pay the rent. CODA, the main detox in the region is located in Portland. CODA has programs in Washington County, but not detox.

Guest perspectives—

I got kicked out of my house, and someone else moved in. It's my Dad's house, but I'm not allowed to live there, because of the nature of restraining orders. I have a camp. I grew up in Oregon, so I know how to camp. The best housing situation for me would be a rural community, with not a lot of people around, because of the voices. I need someplace quiet. I was raised by Native people, and I know how to live.

I've been homeless for a year, living outside.

I've been staying in a car since July.

I have to live alone. Before I lived in the car, I had a good spot, but the people next door wanted to blast the TV all the time, and I could hear everything through the shared wall. I couldn't take it.

I went to high school here. I need a place to go to get self-sufficient. But I'm afraid that if I get housing, I won't know what to do. I'll lose it. I think I'll need help learning how to be independent. With my camp, I don't have any responsibilities. I can get by, and I know how to do it.

In Portland, this would be so much harder. Here I can go places to charge my phone. Here (Washington County), it's safer and more comfortable. It's where I grew up after 3rd grade. I'm not sure how big the problem is out here, but there are a lot of homeless in Hillsboro.

I used to have money and I lived in Hillsboro. When I settled my worker's comp, I could pay my lease, but that money ran out. I could barely pay my lease, my truck, comcast, and insurance, so I lost the place. I'm on disability now, so I can't actually do anything, or I'll lose that. I live in my truck, because my truck payment is $500 a month. I get $724 on SSDI, but they take out money for Medicare Part B so I really only get $567. Don't get me wrong, disability (SSDI) saved my life, but I'm suing the state over my worker's comp. I can't work, and I need to focus on my lawsuit.

There are no easy answers. I came here a few weeks ago, desperate. I wasn't looking for anything, but they gave me a prepaid gas card. It was a miracle. Having access to that $20 gas card; I broke down crying, you can't believe how much it helped. It was what I needed more than anything.

I like to say I'm homeless on purpose. I got a divorce, and I've just embraced being homeless. I am comfortable in the woods; I have no ties. I don't think I could handle living inside. When I

had a job, my wife paid the bills. What I would need would be a place in the community that would do all the paperwork. They could take my check and pay the bills for me, and I could just eat there and sleep there. They would do it for me.

People who know me know where I'm at. So if they want to talk to me they come to my camp.

When I got out of the army, I went to stay with my sister in Portland. She was on meth. I'd never even flirted with it, but then I did and that was that.

I'm a felon. No matter what you've done, you're still not done paying. I can't get work. I can't get housing. No one will rent to me. After a certain amount of time, the conviction should come off your record. Maybe not for people who murder, but most of those never get out. And not people with sex assaults or kidnapping. But other convictions, they should come off your record after some time. You have no idea how much I want to work.

I was in sober living for a while. Then, I don't know what happened, I went out and got drunk. I've been on the streets for five months. Both me and my wife are felons, but she got a place in a house out in Tigard, but I can't stay there. There aren't any places where me and my wife can stay together. I've thought about calling Community Action for help. Unless it's a personal reference, no one will rent to us. Someone has to rent a personal house to us.

I was supposed to sign up at TPI (Transition Projects in Portland) for housing, but I got pissed about losing a job, so I just said, 'fuck it' and went to the woods. I don't see recovering from this. I thought I'd retire from doing gutters, but now I can't even work. I get so sick if I don't use.

I wish I could live someplace quiet, a little boathouse somewhere. I could play my guitar.

I've been living in my car on and off since 2013. I don't walk well and I'm in severe pain. I should have a wheelchair or a walker, but they don't fit in my car. So I make do with the cane and being in pain. I was renting a house in 2007 (in Beaverton area), and my roommate decided to keep living there but stop paying rent. I couldn't make him pay. One day I stepped into the shower and the whole floor of the shower was covered in baby oil. I slipped and almost died. I know my roommate did it. The landlord evicted him, but I couldn't pay the whole rent alone, so I ended up losing the house. Getting evicted. That started me living in my car. After a while, in 2013, I went home to family in Boston, but that didn't work out. Then, I got into transitional housing in Boston, after two years, my time was up and I had no where to go. So I bought a motor home and drove down to Florida. I traveled and stayed in my motor home, but I couldn't afford to camp. I found a free campground in Nebraska, but that closed. So I got back to Portland in July 2017 and my motor home broke down, so I got a car. In February 2018 I got a place with roommates. After four months, I got notice that I had to leave so the girl's brother could move in. So, I'm back to my car.

I need housing with no stairs. I need an apartment, but I need one with a subsidy because I'm on disability. The waiting lists are so long. I've been on the project-based list for six years. There needs to be more housing for people with disabilities. If I can't work and I'm on disability, I can't be living in the woods. I should have a wheelchair.

Examples of Housing Discrimination

Include anything that seems like direct housing discrimination

Access to Proficient Schools

Include anything about neighborhood schools/school choice, etc

I wish there were resources for children, like afterschool programs for kids. I've been here (Washington County) for 27 years. My kids went to these schools. I think any money the County gets should go to the kids who need it most. Afterschool programs.

Access to Transportation

How do they get around? Are they able to get to the places they need to go? What challenges do they experience?

Bus service is ok. I can pretty much get where I need to go.

I'm blessed; I have my truck. Gas is what I need.

Access to Employment

What is their experience related to employment? Able to get a job? Need training for a better job? Are there good jobs close to where they live?

I fly a sign on the ramp. I do ok. Yesterday a guy gave me $100! I couldn't believe it. I'd like to work, but no one will hire me. I used to be in construction, but I got hurt, so I don't really know what I can do. The weather's good today, so I'll go to the ramp.

Before I get a place, I have to get a job. Getting a job isn't that hard, it's keeping a job that's a problem. I had a good job at Burger King, but I couldn't find a place to take a shower, and they eventually had to let me go because I smelled and wasn't clean.

Unpredictable stuff comes up that ends up in losing a job. I had a job that was working out, but one night I slept using my backpack as a pillow, and my toothpaste went all over my only clean clothes. So I couldn't go to work the next day because my clothes were covered in toothpaste. I lost the job.

To get a job, you have to have a phone, and you have to charge your phone. Sometimes I feel like I spend all day charging a phone. And, with online applications and everything, it has to be a smart phone. Sometimes the Obama phones just break and you're out of luck.

I used to deal cards. I made a really good living, but then they changed the law and I couldn't deal cards any more. So now, the only place I can work is Vegas. I've applied to a few places, and if I get that job, I can go down and make all the money I need to start over here.

I'm a graphic artist by trade, but my business crashed in the recession. So, I started driving a semi. I slipped on a dock and tore up my wrist, and it was a big worker's comp issue. Worker's comp didn't pay for time lost, I needed several surgeries, and finally settled worker's comp.

I had a job. I wanted to do it. But then everything fell apart and I went off the grid.

I'm a canner now (collects cans for $). I'm a dumpster diver. I've always worked, but I've lost jobs because of differences with people. Now, I'm a scavenger.

It would be great if the County money (CDBG) could help start DIY businesses.

Access to Services

Include anything related to health or human services

I've been on supervision for three years in Washington County for meth. I was in a recovery farm for 70 days, then I went to a clean and sober home. But everyone there was using! So now, I camp.

You can go to LifeWorks for help or CODA. With LifeWorks, you have to be on time, every time, or they won't help you anymore. They'll talk your ear off even if you have PTSD. I've never been to CODA.

Really need storage for my things so that I could get a job. Everything I have is in these two backpacks. There need to be more places to take showers more often.

There's Open Door—it's open four days a week, and it's just an open door policy. Anyone can go there. Down here (Sonrise), it's more cultured. There are rules.

I don't qualify for any help. I'm young, I'm healthy, I'm not addicted to anything, I'm not a felon, I'm not a veteran, I'm a man, I don't have kids. There is literally no help that I qualify for. I don't have a family; they're all dead. All I need is a month off the streets, where I can shower every day, have a place to sleep, and can go to work. I could earn enough in a month for a deposit and I could get a place. I just need a month of help.

Resources are spread all over the place. I wish there was just one place to go to get everything.

For me, gas would be most helpful. If I have gas, I'm OK, because I live in my truck. I'd also like access to places to bathe, more than once a week. I signed up for SNAP; I didn't want to, but I had to. The Oregon Food Bank here should be shut down. When you get rotten or almost rotten food from them, eat it because you're hungry, and then you get sick. It's awful, especially since I don't have access to a bathroom. You don't want to be sick and not have that.

Phones are really important. I used the Brookwood Library (Hillsboro) to get on the Internet for job applications and information.

It's really hard to find doctors that take Medicare. OHSH (the med school) is the best resource to see a doctor or a dentist. They're students, but they'll take care of you.

There's a place behind Intel, the ORHS office, and that's where I applied for a SNAP card.

My advice would be for people to not hesitate to ask for help. I wish I would have asked for help so long ago. I've never even gone to the VA. I haven't taken advantage of VA benefits.

People don't come in from the woods. Maybe if you did something fun in the woods, like a small concert, or had hotdogs, make some noise, then maybe we would come in, and you could offer help.

Access to Low Poverty Neighborhoods

Is the neighborhood safe? Access to good quality fresh food? Sense of community? Other indicators of a healthy mixed income neighborhood? Access to park and recreation facilities? Libraries? Other public amenities?

We're people, so I wish we were treated like people. Instead they judge us. I wish everyone had the attitude that we're all just people. To respect each other. I came here to pick up my guitar, and here (Sonrise), they treat me like a person. Like I'm a part of the community.

I think the County is on the right track with how they help the homeless. They pay attention.

The police are always looking for the homeless. The cops pull up on me for sitting in the truck. In some places, churches can have people stay in a parking space for up to 90 days. That would be safer.

Access to Environmentally Healthy Neighborhoods

Include anything related to environmental quality, both in the neighborhood and within a home or apartment building (e.g., mold, bed bugs, etc)

Fair housing capacity and resources

Include information about how accessing fair housing resources; if these are working and/or other resources are needed

Section VI Feed Goals and Strategy Recommendations

Example from Westwood group: We need a fund, or a community coop, where we can help each other pay rent when we need help, help each other purchase a home.

Moderator ideas/solutions brainstorm:

- Best practices for safe storage of belongings
- Expanded shower options (increase days of week, hours of service)
- Short term transitional housing—get on your feet program, not geared to those with more severe barriers to stability, but to people who just need 30 or 60 days of a safe, predictable place to sleep and eat while working to earn deposit and secure housing

- Get a better understanding of current status of outreach when winter shelter is not in operation. Access to addiction services? Crisis and on-going mental health management?

Focus Group/Pop Up Notes

If possible, try to organize your notes by category, to make it easy to scan and incorporate into the AFH.

Section III Feed Citizen Engagement

Group Location/Date/Time/Host

Sequoia Mental Health / April 17, 2019/3:00-5:00pm/ Sequoia Mental Health Services

RECAP

Demos: (approximate to the best of your ability)

of Attendees: 10

by race/ethnicity: 10 White

by disability:

by families w/ kids: All single individuals

by language other than English (and the language)

Attendees: 10

Language: English

Typically under-represented population? People with psychiatric, emotional and developmental impairments

How recruited: The discussions were held at Sequoia Mental Health Services – Clinical office during drop in hours. Interested adults participated and received a $20 WalMart gift card.

List of organizations consulted:
Sequoia Mental Health

Section V Feed Analysis

Current Housing Choice

Where they live, experience getting their place to live, why picked location, etc.

I live in a great apartment. I've been at Spruce place for 8 years and I was able to get into my home with the help of my advocate.

I'm living at Tri-Haven and it's sometimes loud because of the people and the way the rooms are next to the tv. I wish I had my own place where I could just close the door and it would be

quiet. My advocate is trying to find me a new place, but it will take time. It's better to take the time than be out on the street.

My place is too big. I have a two-bedroom unit and that is all they had. I need a smaller place, but all the one bedroom units are taken.

The application process is too rigorous. Too many steps at each place. Doing it once would be easier to understand.

Examples of Housing Discrimination

Include anything that seems like direct housing discrimination

Discrimination wasn't specifically noted. All have found current housing through their case manager.

Access to Proficient Schools

Include anything about neighborhood schools/school choice, etc

Schooling was not addressed by this group

Access to Transportation

How do they get around? Are they able to get to the places they need to go? What challenges do they experience?

My case worker takes me different places, but if I want to go on my own then I can take the bus.

Sometimes the housing is way out in the rural area. The bus line to Forest Grove is spotty and makes it hard to access services and appointments

Being too far away from services makes it hard. Sequoia helped me get into my apartment and they make sure some of the meetings and sessions are close by

Access to Services

Include anything related to health and human services

We need to have some type of life skill training. Like, how do we keep our house clean and what should we use to clean it

It's hard being alone. Maybe if there were companion services or more community events. I'd like to have a pet with me.

I really need my case manager. She's really great and helps when I don't understand or can't get somewhere

Compassion. I just wish everyone would give me a chance.

It would be nice to find housing/services without having to go to the hospital

Access to Employment

What is their experience related to employment? Able to get a job? Need training for a better job? Are there good jobs close to where they live?

I can't work right now and get SSI

It's tough to keep a job and stay sober

Access to Low Poverty Neighborhoods

Is the neighborhood safe? Access to good quality fresh food? Sense of community? Other indicators of a healthy mixed income neighborhood? Access to park and recreation facilities? Libraries? Other public amenities?

The section 8 wait list is too long. It's too big for people like me to find a place to live without losing hope

Need to have more choices on where to live

Hard to find a place when you have a lack of rental history

Access to Environmentally Healthy Neighborhoods

Include anything related to environmental quality, both in the neighborhood and within a home or apartment building (e.g., mold, bed bugs, etc)

Can't lump together mental health and substance abuse people, It's not healthy for us to have them combined because we each have different needs and conditions

Need to make sure that background checks are done so it stays safe

Fair housing capacity and resources

Include information about how accessing fair housing resources; if these are working and/or other resources are needed

Not sure where to go for help, I rely on my friend for information

I rely on my parents/family for finding out who can help me

I google it.

Quotes:

Example from Westwood: "We don't want more housing if it is small apartments. We want our children to be outside playing, to be creative, to enjoy nature."

We are people too. Sometimes we get taken advantage of and we just want someplace safe.

Multifamily Affordable Housing Developers and Owners LIS Input Meeting
May 15, 2019

Introduction:

Department of Housing Services facilitated a meeting of affordable housing developers within Washington County to receive feedback on the first draft of the County's Local Implementation Strategy. The meeting included an overview of the Metro Bond, unit production targets, key components of the first draft of the County's Local Implementation Strategy, as well as a timeline for revision and approval of the document. Developers were then divided into three smaller groups to discuss three key pieces of the Local Implementation Strategy: permanent supportive housing, advancing racial equity, and project selection criteria. Feedback from each of those small groups is listed below by area.

Permanent Supportive Housing (PSH)

Challenges Group 1

Screening People into PSH

- Not able to check arrest records (LIS p. 5)
- How do we intake people with sex offences, Illegal drug activity, SPMI that is untreated?
- Housing first – house everyone?
- Risk Mitigation Pool or risky tenants
- Priority populations for PSH: older w/ disability, developmental disabilities, high needs SPMI
- Standards not eclipse landlord tenant law
- Carve out for sponsor to work with violent people with offender history
- Racial equity training at property screening/management

Operations

- Will LIS provide target housing? All SPMI, drug/alcohol housing, etc?
- Service dollars – sustainable? LIS p 19 Count HHS and Partner – more specific if possible
- Service sustainability period such as 15 yrs, 30 yrs, 60 yrs, so 15 years for services and 30-60 years for sticks and bricks
- Definitions of services

Priority for PSH Units

- 226 units tri-county for homeless
- <30% units for general population – who provide these services (non-homeless)

Challenges Group 2

Screening People into PSH

- Should PSH restrictive rights be 15 years and not 60 years?
- Need more services to manage tenancy supports
- What is County planning for PSH screening criteria? Eg landlord vs homeless system "Housing First"
    - Arrest records (LIS p 14)
    - Support criteria – service money from County
    - Sex offender – can consider
- Can treatment be required?
- Risk mitigation for high need populations

Priority for PSH Units

- 226 units tri-county in Equitable Housing Plan
- Referral process?
- PBVs –

  - what is allocation? Is it 8 per site (on p 5) or is there anther limit? Spell out
  - If no limit to PBVs can more bond funds be allocated to pay for Davis-Bacon prevailing wages?

Social Security # not check

- Racial equity lens: do not ask
- Training for intakes to ensure equity
- Applications is multiple languages
- Call out the denial to appeal/reasonable accommodation process

Operations/Service Funding

- P 19 does not talk about how
- Without flexible funds, how?
- Can't expect provider/partners to cover costs
- How will this be monitored by the County once in housing
- Sustainable service dollars are needed
- Rules v Sustainable funding are two separate w/o commitment
- Integration with funders demands (banks, state)

<u>Challenges Group 3</u>

Screening People into PSH

- Screening from lens of Housing First is Landlord v Homeless System
- LIS does not clarify if bond can be used to build site for specific population like SPMI
- Does LIS preclude or require?
- Create Mitigation Pool/Fund
- Align decision and definition of Tri-County plan on PSH
- Connect with Tri-County report
- Align definitions of PSH, Residents Services, Homeless or create more flexible county definition (?). Is this possible with PBV?
- Residential screening Criteria should be no more strict than department of housing services low barrier criteria

Services funding

- Where does the money come from to sustain the project, eg 15 yr, 30 yr, 60 yr
- PDX Bond language for 30% units, if no services and _____ convert to 30% non-PSH
- Incentive or RFQ to make it happen
- P 19 on county HHS and provider partnership is vague

Operations

- Operationalize/Priority populations in PSH unit complexes
- Resident services on site
- LIS definitions on resident tenancy, client services, treatment
  - Who will fund?
  - Transportation? Navigation?
- 226 units in Tri-county for "Homeless"
- Priority for all PSH populations based on acuity
- Coordinate entry with Community Connect
- Will there be a required number of PSH units per project?
- Can we house people who self-identify as homeless or in need of PSH?

Advancing Racial Equity

Challenges Group 1

Screening Criteria

- Criminal history – are felonies included? Maybe including PHA Plan definition
- Look at nuance of eviction or all evictions. Don't screen out if a tenant just can't make rent. Help property managers get more information.
- Nuisance crimes – when people are stabilized they are fine, such as with mental illness. Partner with LifeWorks and Sequoia
- When thinking about policies, where there is a life/safety threat, don't layer on more obligations. It effects other tenants, such as people who attack with weapons don't belong in buildings
- Screening criteria – low barrier pre-qualification process

MWESB/Equity

- The 10-20% MWESB criteria is an easy button that misses the target. The people who need help are the low income ones who need training for a trade. Push more toward workforce than the business ownership
- Concerned about meeting the 20% goal since the tri-county region will be spread thin
- Think about professional services and the specific workers
- GCs don't do the work, the subs do. Subs can walk away due to red tape
    - PHB requires workforce training and adds costs to all sub projects, not just the PHB projects
- Certified payroll can work…
- Labor, materials, and equipment could be included to meet the goal, and services, not just the construction workers portion
- Smaller subs cold have a continuing training so they could be more productive on a smaller scale
- Wealth and capacity building in minority communities. Reflect in partnerships to meet the goal. Property owners can bring that benefit to the community and create a larger path.

Challenges Group 2

MWESB/Equity

- 10-20% criteria: in PDX they say anything over $300,000 in a project needs to be MWESB
- 20% is do-able but also need to work on workforce development They spend money buying subs off of other jobs
    - Professional services and contractors are where competition is
    - Need our own pool of contractors
- Getting people qualified to be a subcontractor is needed. The pool is too small. They also need to be aware of the pool. Subs may already be out there and need education and awareness process to make them aware of opportunities
- CPAH set a 30% MWESB goal for their next two projects that are still ramping up. They think they can get there.

- The MWESB process is hard to get registered for, the paperwork, etc. A business self sufficiency person at the County, possible, could help this.
- Also, people do have fear even if they are legally in the US
- Homeownership is a key to racial equity. Mobile home parks, too. Specifically call out as a key for racial equity. Call out conversion of mobile homes parks as a homeownership policy.

Screening Criteria

- Limit SS# from screening process
- Can we say undocumented people can live in the Metro Bond housing since no HUD or RD funding is being used? This bond funding is more flexible and we can create opportunities.

<u>Challenges Group 3</u>

MWESB/Equity

- What are the mechanisms for accountability later with contractors who have experience and can meet goals vs those who say they will?
- Certification for businesses is hard. Self-certification to report – she would ask everyone
- Make the % goal informal, ask if the subs/contractors intend to be certified and encourage or incentivize to do so
- Get a meeting with contractors to ask about the % goal
- Innovative Housing used MCIP in PDX to access the subs to access minorities to convince them to bid. It is also relationship building. Get help from culturally specific organizations to access the minority owned businesses.
- Have a line item in the budget for MCIP (for example)

Screening Criteria

- May need looser criteria that is appropriate to the population.
- Integrated communities concept tries to get away from segregating populations
- Do we need to mitigate projects with mixed incomes and populations?
- Community Action has a hard time imagining integrating the PSH population with other
- populations
- Physical or health related issues are different than SPMI population (Severe and Persistent Mental Illness)
- Innovative Housing has done 1BR units for individuals; now they are housing families. Struggling with relaxed criteria that screens our felonies and sex crimes because families need to be protected
- SPMI, or SPMI + drug use or SPMI + _____, these are all different
- Innovative Housing is partnering with the Hispanic Council in Astoria during the design phase of a project. Also contracting with them during lease-up. Hispanic Council is their advocate. This is a nice model and needed in the Metro Bond. Bienestar likes this model, too.

Project Selection Criteria

Challenges Group 1

Workforce Development

- Critical to bring people into the trades
- Adds cost
- Need to bring in new subcontractors to this type of construction
- Dollar amount vs. percentage goal. Goal for achieving this should be based on the full leverage of Metro bond funds – the total development cost of a project. Also look at the number of people who are provided an opportunity to work in the trades.
- There is a shortage of workforce and that varies throughout the region
- Work toward this goal should be evaluated at milestones in the Metro Bond implementation timeframe.

Nonprofit Preference

- Are you really trying to get at providing a preference for local developers or CHDOs (Community Housing Development Organizations)?
- There is a difference in mission between nonprofit and for-profit developers. Nonprofits more likely to reinvest profits and have different profit margins.
- Is there still a nonprofit capacity issue with all the bond resources that nonprofits need this advantage?
- What is the County trying to achieve with this preference?
    - Local reinvestment of project cashflow?
    - Investment in services?
    - Provision of resident services?
- Don't forget that existing service providers are providing services already to some of the people who will be housed. They are doing it with existing resources (e.g. Medicaid).

Universal Design

- Providing backing for grab bars is low cost universal design element.
- Universal design is better/less expensive than addressing it after the project is built through reasonable accomodations.
- Universal design allows for longevity/support for tenants as well as sustainability.
- Design should be well=-fit to special needs population as needed. This depends on the target population for a project and should be tied into community engagement work for that project.
- Balance of cost of construction with durability of the projects.

Challenges Group 2

Workforce Development

- County should identify partners – create a flow of individuals
- Will there be reporting required? How will a project or developer or the County know it is achieved?

- It is important to look at the track record of a contractor and be aware of differences within the region.
- MCIP and Best HQ can be resources.
- County should coordinate training around COBID to help contractors and subcontractors certify as MWESB in advance of developments so that it doesn't slow down individuals projects (and inadvertently add cost).

General

- Make project selection criteria more specific and based on a pool of projects competing for funds rather than a particular scoring scale or rubric.
- Link Permanent Supportive Housing report to the Metro Bond.
- Time vs. production – will you have a certain percentage of bond funds set-aside for fully-funded projects that can move forward more quickly, and also retain funding for projects needing competitive gap funding?

Universal Design

- Are you intending to prioritize buildings with elevators? This could limit projects to more urban design and locations where that design is a good match.
- Universal design should promote creative design based on site constraints.
- Add in low-cost/no-cost universal design features
    - Tub/shower enclosure that can support future grab bar installation
    - Grab bar reinforcements
- Important to have appropriate marketing to connect accessible units with households who need them.

<u>Challenges Group 3</u>

Workforce

- County should consider the contractor's track record in achieving this.
- County should take the lead on helping subcontractors qualify as MWESB.
- There is a need for established apprenticeship programs (State of Washington has this).
- Metro has started Construction to Career Pathways program – the County should be involved with it.

Nonprofit Preference

- Establish a unit target by MFI level set-aside for nonprofits. Nonprofits don't want to have to provide all the 30% MFI units while for-profit developers produce those targeted for higher income households.

Universal Design

- Construction costs are now as high as $200/SF, every requirement adds to it (like universal design). This limits the number of units that can be produced.
- Need to understand which items have the most value and where the most cost savings can be had vs. having to retrofit units later.

- Important to consider those items that allow tenants to age in place – colors, door handles, wayfinding signs

General

- Clarify the RFP/NOFA process for Washington County identified sites. There should be an RFP process for high opportunity sites. Developers don't want to inadvertently compete with the County on purchasing sites.
- There should be an option for mixed-income housing.
- When the County does acquire a site, it should complete any zoning changes needed before issuing an RFP for the site.
- Streamline the RFP process.
- Consider funding ADUs (Accessory Dwelling Units) that can be added to lots as a duplex or quadplex.

Metro Affordable Housing Bond – Washington County Local Implementation Strategy Draft 1
Outreach to City Councils – May 2019 – Feedback Summary

Introduction:

During the month of May 2019, the Department of Housing Services staff presented to each city council with the Washington County Metro Bond implementation area. The presentation included an overview of the Metro Bond, the unit production targets for Washington County, key components of the first draft of the County's Local Implementation Strategy, as well as a timeline for revision and approval of the document. The slide deck from those presentations is included at the end of this summary.

Cornelius City Council – Meeting May 6, 2019

Questions:

- How many people will be housed with those units?
- How will the lease-up process help ensure that people who were a part of the community engagement process for a project have an opportunity to live in the housing once it is built?

Comments:

- We would like to see more affordable housing in Cornelius, especially for families.
- The city has a large Hispanic population.
- The city is growing.

Sherwood City Council – Work Session May 7, 2019

Questions:

- How does 30%, 60%, 80% MFI compare to what a person earns working full-time at minimum wage?
- What other community outreach have you done?
- How many units are targeted to serve households at 60% MFI?
- How will you make sure the units are built efficiently?

Comments:

- Affordable housing is an important need.
- It will be important to determine a funding source for the supportive services before people move into this housing that will be built.

Forest Grove City Council – Meeting May 13, 2019

Questions:

- How does 30%, 60%, 80% MFI compare to the method used to determine whether a family qualifies for free/reduced lunch?
- How will these funds help existing affordable housing that does not have enough resources to complete needed maintenance and repairs?
- In a rehab project, who owns the project once the work is completed?
- How does Project-Based Section 8 work?
- Do you think much funding/projects will come to smaller jurisdictions like Forest Grove?

Comments:

- Half the school population qualifies for free/reduced lunch. There is a lot of need for affordable housing here.
- Adelante Mujeres, Centro Cultural, and Virginia Garcia Medical Health Clinic are all good resources in Forest Grove for the County to work with on this.
- Affordable housing is an important need throughout the region and the state, as well as in Forest Grove.

Tigard City Council – Meeting May 14, 2019

City of Tigard staff prepared a memo in advance of the meeting outlining their recommendations for revisions to the draft Local Implementation Strategy. That memo is attached.

King City Council – Meeting May 15, 2019

Questions:

- When is the right time to be talking with the County about potential projects? How early is too early?
- Are there environmental review requirements for Metro Bond projects?
- When will funds be available?
- Can Metro Bond funds be used to purchase sites?

Comments:

- We have supported this bond and think it is important.
- There are only two lots of land available in current city boundaries. Their city is built out so they have to build in the UGB.
- The City is interested in developing a mixed-use project in the new town center area (land recently brought into the Urban Growth Boundary), that would include affordable housing, along with a library, and possibly a new City Hall and TVF&R facility. The Cornelius Library project is a good example of what they would like to do. This property still must be purchased and go through a Master Planning process.

Tualatin City Council – Work Session May 28, 2019

Questions:

- When does Tualatin enter conversations with Washington County for what kind of assistance can be offered for projects they are interested in?
- Is there an application cycle for Washington County bond funds?
- How would it work to acquire existing properties and do they have to be privately owned?
- Once LIS is in place, does Washington County screen them or is it metro, or the Housing Authority? Who says yes to a project?
- Is Washington County expected to have harmony between the Washington County strategy and the Metro strategy? If a project meets the Washington County LIS will in also meet Metro's requirements?
- Will the Housing Authority purchase buildings and operate them?
- Would Housing Authority maintenance costs come from the Bond funds?
- Are Project Based Vouchers an annual allocation or in perpetuity?
- What if funds are no deployed in 5-7 years?

- Will Washington County purchase land to develop with a non-profit or are we only interested in existing buildings?
- How is the waiting list generated for those who wish to rent?
- What kind of outreach will be done with respect to various languages spoken? There are 47 languages spoken in the Tigard/Tualatin schools.
- If Tualatin builds 200 units who gets priority for those units? How is the criteria for entry laid out so it's an equitable process?
- Will some units be for people on disability?
- Tualatin has a plumbing/trades school. How does Washington County encourage partnerships with organizations like that?
- Tualatin has just opened a day center for homeless families. Does Washington County know these programs?
- Does Washington County anticipate sticking to the schedule presented or is there slipping anticipated? Developers they are talking to are waiting on the LIS. When does Washington County anticipate publishing the final LIS?
-

Comments:

- They have three possible projects/project sites

Durham City Council – Meeting May 28, 2019

Questions:

- Staff were asked to clarify the role of the Cities of Beaverton, Hillsboro, the Housing Authority and the bond program implementation.
- Is the Metro Housing Bond a new approach for the region or is it tied into existing housing efforts?
- Is there an estimate of the number of needed housing units for Washington County?
- Who are the underrepresented populations in Washington County that are targeted in the Community Outreach Plan?
- How will the tax credit program will work? Do tax credits follow the tenant as they move to different housing? How does the new tax credit program worked with Section 8 Housing vouchers?
- What comes after this program expires in 5 years? Will there be a request to renew it? How will the projects and programs continue?
- How will the funds would be dispersed throughout the jurisdictions in Washington County? What factors will be used to site housing in the various jurisdictions. Are areas targeted for affordable housing development?
- This program covers 10% of the affordable housing need in Washington County. How will the remaining 90% of need will be addressed?

Comments:

City *of* Tigard
Memorandum

To: Honorable Mayor Jason Snider and Tigard City Council

Cc: Komi Kalevor, Director, Housing Authority of Washington County
Shannon Wilson, Housing Authority of Washington County

From: Schuyler Warren, Associate Planner

Re: Washington County Draft Local Implementation Strategy – Metro Bond

Date: May 8, 2019

The purpose of this memorandum is to provide staff comments on the draft Local Implementation Strategy (LIS) for Washington County. The LIS guides the use and allocation of funding to Washington County from the regional affordable housing bond passed by voters in November of 2018.

Comment 1: Homeownership

The strategy needs stronger language around affordable homeownership. Throughout the document, the focus is on rental, with little attention given to ownership. Page 3 includes the following introduction:

> *"Housing developed will primarily be regulated affordable rental housing units, with the potential for regulated affordable home ownership units."*

Recognizing that the income targets for the bond money will necessitate rental units for the lowest income bands, the targets for higher bedroom counts present an opportunity for affordable homeownership for families. Additionally, there will likely be significant competition for state subsidy to match bond dollars, meaning that bond dollars might be better spent in some cases on permanently affordable homeownership models that can utilize alternative subsidy and finance models to deliver units. Further, if the county is to truly follow the principles of racial equity as outlined on page 5 of the draft, then the history of racial segregation, redlining, and unfair lending practices that have disenfranchised minorities of the opportunities and wealth-building inherent in homeownership must be acknowledged and should begin to be at least partially rectified through this bond. None of these historic practices are mentioned or addressed in the section on racial equity for their contribution to the disproportionate minority need for affordable housing. While rental housing is important, it will not fully address the long-term ramifications for minority families of being excluded from the real estate market. Some level of commitment to addressing these issues is warranted. Finally, middle housing developments have been identified as a regional priority by Metro and many of the jurisdictions of Washington County. Regional bond dollars should be spent at least

partially to demonstrate the viability of this regionally-prioritized housing type to help fill the gap in affordable homeownership. This is in line with the comment received on page 9 seeking "equitable distribution of housing in mixed-income areas with broad geographical dispersal."

City of Tigard staff recommend the following:

- **Address contributing factors to lower minority homeownership in racial equity section.**
- **Acknowledge regional priority for middle housing.**
- **Include targets for ownership units in the "Framework Unit Production Targets for Washington County" table.**

Comment 2: Flexible Allocations

City staff have some concerns about the operating principles agreed to by Washington County and the implementing jurisdictions of Beaverton and Hillsboro on page 4. The two entitlement cities each have an earmarked amount to allocate to developments within their jurisdiction. However, the following language makes those amounts flexible:

> *"Second, each jurisdiction will have autonomy in project selection, commitment of bond resources, and oversight of bond funded projects. The jurisdictions may choose to collaborate on specific projects that will serve their individual as well as collective community needs. This may result in actual expenditure of the bond allocations across the three jurisdictions in a different blend than envisioned at the outset."*

While some flexibility is warranted given that it would be difficult to spend the exact allocation amount in each implementing jurisdiction, the language in principle number 2 is overly broad and does not provide a guarantee that Beaverton and Hillsboro have an upper limit.

City of Tigard staff recommend providing a specific flexibility target for each jurisdiction that cannot be exceeded.

Comment 3: LIS Revision

The LIS includes a provision for review and revision of the LIS after 18-24 months and 48-60 months. Page 10 includes the following language:

> *"…the review process will include community outreach and engagement, review and amendment by the Washington County Board of Commissioners, and submission to Metro's Community Oversight Committee for review and approval."*

This language does not specifically include outreach to the non-implementation jurisdictions.

City of Tigard staff recommend including specific outreach and collaboration with non-implementation jurisdictions in any review and revision of the LIS.

Comment 4: Tigard Affordable Housing Targets

Affordable housing need figures are identified in a table on page 11. Locally identified need figures were not included for Tigard. The Southwest Equitable Housing Strategy (2018)

identified the following need in just the Southwest Corridor area of Tigard (along the planned SWC light rail alignment):

- 730 constructed
- 850 acquired or converted
- Total: 1,580 homes

Based on these figures, the actual need throughout the city is much higher.

City of Tigard staff recommend including the housing need identified in the Southwest Equitable Housing Strategy as a baseline need, acknowledging that citywide need is far higher.

Comment 5: Metro Acquisition Funds

One of the identified factors for evaluating potential projects (page 12) is land availability and cost:

> *Land Availability and Cost. Buildable land that is also appropriately zoned and offered at a fair market price will be a high priority factor in determining the location of an affordable housing development. However, donated land meeting other factors will receive a very high priority.*

This factor does not specifically give weight to county or local jurisdiction coordination with Metro on land acquisition, using the funds earmarked from the bond for that purpose.

Further, the section on the Metro acquisition program (page 15) states that the county will coordinate with Metro on identification of potential sites, but does not specifically state how local jurisdictions may participate in that process.

City of Tigard staff recommend:

- **Including identifying the ability for the county, developers, and local jurisdictions to coordinate for property acquisition with Metro as an evaluation factor.**
- **Include language affirmatively coordinating with and including local jurisdictions in the identification process for potential Metro acquisition sites.**

Washington County Affordable Housing Bond Local Implementation Strategy

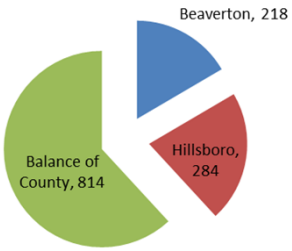
City Council Presentations
May 2019

Komi Kalevor, Executive Director
Shannon Wilson, Housing Development Coordinator
Housing Authority of Washington County

Metro Regional Housing Bond
(Measure 26-199 and Oregon Measure 102)

- $652.8 million in bond proceeds to be used in Washington, Multnomah, Clackamas (area within the UGB)
- In Washington County – $188 million for housing projects; target is to build or acquired 1,316 units of regulated affordable housing in the county between 2019-2026 (5-7 years)

Units to be Produced with Metro Bond



5/15/2019 Slide 2

Metro Housing Bond Framework in Washington County Bond Area

- Leading with Racial Equity and Community Engagement
- 334 units (in Washington County) serving households at or below 30% Median Family Income
- 407 units for families (2+ bedroom units)
- Up to 81 units created serve 'workforce households' earning 61-80% Median Family Income

Household Size	30% Median Family Income	60% Median Family Income	80% Median Family Income
1 person	$17,100	$34,200	$45,600
4 people	$24,420	$48,840	$65,120

Source: HUD.gov accessed on 9/10/2018

5/15/2019 Slide 3

Local Implementation Strategy

Key Features of LIS

- Each implementing jurisdiction develops their own strategy
- Outlines how the jurisdiction envisions achieving its unit production target
- Four guiding principles

1. Housing development plan, including criteria and selection process for projects
2. Strategy for advancing racial equity throughout implementation
3. Engagement report summarizing how stakeholder input shaped development of the strategy
4. Plan for ongoing community engagement

5/15/2019 Slide 4

Key Features of LIS

- Each Implementing Jurisdiction develops its own strategy
  - Autonomy
  - Collaboration
  - Coordination
- Each Implementing Jurisdiction has a unique strategy
  - Land Availability
  - Local Development Partners
  - Major transportation and economic corridors
  - High Opportunity Areas
  - HUD –Qualified Census Tracts (QCTs) and Small Area Difficult to Develop Areas (SADDAs)

5/15/2019 Slide 5

Guiding Principles

1) Housing Development Plan

- Targeted balance between HAWC-owned, private developer-owned housing and non-profit developer-owned housing
- Geographic distribution of bond-funded projects
- Balance between new construction and acquisition/rehabilitation of existing housing
- Connection with supportive housing services

2) Strategy for advancing racial equity

- MWESB Contracting
- Affirmative outreach and marketing to target populations
- Low-barrier screening criteria
- Project Based Voucher (PBV) process

5/15/2019 Slide 6

Guiding Principles

3) Community Engagement

- Coordinated outreach to communities of color
- Development community, public and private
- Identification of key issues and priorities for the community

4) Plan for Ongoing Community Engagement

- Phase 2 – contract with community engagement practitioner
- Focused on reaching underrepresented communities, neighborhoods impacted by a proposed housing project, and general community members

5/15/2019 Slide 7

Leveraging Resources

- Maximize use of non-competitive resources
- Maximize use of private resources
- Maximize local resources
  - Project Based Rental assistance
  - Property tax exemption and/or PILOT agreement
  - HAWC Conduit Bonds
  - Housing Production Opportunity Fund and Washington County General Fund
  - Resources of partner jurisdictions

5/15/2019 Slide 8

LIS Development Next Steps

- **4/23** – 30-day Public Comment period begins
- **5/7** – Board of Commissioners Public Hearing
- **5/1-5/31** – Presentations/Listening Sessions with each City Council, Washington County Planning Commission and Policy Advisory Board
- **5/28** – Board of Commissioners Work Session to review LIS Draft 2
- **6/11** – Board of Commissioners Work Session to review LIS Draft 3
- **6/25** – Board of Commissioners considers approval of LIS
- **7/24** – LIS review by Metro Community Oversight Committee
- **8/1** – Metro Council considers approval of LIS

5/15/2019 Slide 9

For more information:
https://www.co.washington.or.us/Housing/regional-affordable-housing-bond.cfm

To provide public comment:
AffordableHousingBond@co.washington.or.us

5/15/2019 Slide 10

Affordable Homeownership Developers LIS Input Conference Call
June 4, 2019

Introduction:

Department of Housing Services facilitated a conference call with affordable homeownership developers within Washington County to receive feedback on the draft of the County's Local Implementation Strategy. The call included an overview of the Metro Bond, unit production targets, key components of the first draft of the County's Local Implementation Strategy, as well as a timeline for revision and approval of the document. Metro staff also participated in the call to provide context and clarify specific requirements of bond funds when utilized for affordable homeownership.

Key Comments:

- Provide language in the Local Implementation Strategy that keeps the door open to homeownership.
- Consider setting a unit target for homeownership.
- Developers can partner together and use a mixed income model to target lower Median Family Income (MFI) levels.
- Donated land would help lower cost of projects.
- $100,000 per unit in Metro Bond funds would allow for the development of affordable homeownership units (leveraged with other resources).
- Affordable homeownership developers do have a permanent affordability component, upon every resale. It is also a shared equity model, and they utilize sweat equity.
- Using Metro bond funds to support affordable homeownership development helps achieve Metro's goal of advancing racial equity.

Washington County received five formal letters from individuals representing organizations that operate in the county. Letters were received from the following organizations are included in this appendix.

- Bienestar
- Community And Shelter Assistance Corp. (CASA)
- Community Housing Fund (CHF)
- Community Partners for Affordable Housing (CPAH)
- Welcome Home Coalition

BIENESTAR

www.bienestar-or.org

June 11, 2019

Washington County Chair Kathryn Harrington
Board of Commissioners
1551 N. 1st Avenue, MS-21
Hillsboro, OR 97124

Dear Chair Harrington and County Commissioners:

I am writing to you regarding the most recent draft of Washington County's Local Implementation Strategy (LIS) for the Metro Affordable Housing Bond. I wish to commend the staff at Washington County's Division of Housing Services for the hard work they are doing to develop the LIS and move along a process to ensure that the Metro Housing Bond funds benefit the community and serve those most in need of safe, stable and affordable housing.

Bienestar has been a non-profit affordable housing developer operating in Washington County since the early 1980s. We got our start with a farmworker housing development in Forest Grove, to address the appalling conditions that existed in many farmworker housing camps. Over almost four decades of work, Bienestar has helped develop 13 multi-family properties that provide housing for farmworkers, working families and seniors. The organization has a long, rich history of doing the difficult work of affordable housing development in the County, at times even in the face of fierce resistance and even overt racism. Our commitment to provide housing, promote racial equity and build community in the properties we develop runs deep.

Bienestar is also one of only two Community Housing Development Organizations (CHDOs) based in Washington County. Being a CHDO means we have a long-term commitment to this area, and that Bienestar exists not only to serve the community but to also be an important part of that same community. As a CHDO, Bienestar has embraced efforts to increase the funding for affordable housing in our County and worked hard to support the passage of the Metro Housing Bond. Our board of directors took the unusual step of endorsing the passage of the Metro Housing Bond, and several of our staff and residents worked to support the Metro Housing Bond's campaign last fall.

In that context, I would like to offer a few comments on the second draft of the LIS:

220 SE 12th Avenue, Suite A-100 Hillsboro, OR 97123 bienestar-or.org

BIENESTAR

www.bienestar-or.org

1) Bienestar supports consideration in Metro Housing Bond funding decisions for non-profits and in particular non-profits with deep roots in the community and with a demonstrated commitment to racial equity. The second draft of the LIS contains a set aside for CHDOs and small non-profits, though I have heard that that set aside may expand to include all non-profit developers. Although this set-aside is a good first step, I would also ask that the County consider adding points for local non-profits in the scoring of proposals through competitive projection-selection processes. Adding points in scoring systems for local non-profits may achieve the same goal as a set aside but will ensure that there is not a perception of a "ceiling" of funding for local nonprofit developers.

2) I am concerned by Appendix B in the draft LIS. The Appendix lists six projects for which the County has apparently already selected sites and developers for projects, including tentative commitments of Metro bond dollars, and lists seven other projects that appear to be for illustration purposes only. The list of six projects don't seem consistent with the principle of transparency that was central to the Metro bond's framework and core values. When Bienestar's board endorsed the Metro bond and our staff and residents advocated for it, we did so in part based on the promise of transparency. To me, the following questions arise: How were these projects selected? What processes were used to evaluate them? Why has there not been a public statement that the County is open to receiving proposals *even before the LIS is finalized and approved by the County Commissioners?* I urge the County staff to be transparent about conversations being held with potential developers who will access Metro bond dollars for their projects, and lay out the process they intend to follow to select projects for Metro bond funding.

3) I also want to affirm Bienestar's view that Washington County should be open to making strategic investments of Metro housing bond dollars to support homeownership, when appropriate. For low- and moderate-income working households, especially households of color, homeownership not only provides housing stability and an opportunity to build assets and create intergenerational wealth, but also frees up scarce units of affordable rental housing for other households. Homeownership models that create permanent affordability but allow homeowners to share in the appreciated value of their home should be considered as an eligible use for Metro Housing Bond funds.

4) Finally, I urge the County staff to strongly consider how the LIS and Metro Housing Bond implementation in Washington County will promote racial equity, and to lay down clear markers and measurable outcomes for the promotion of racial equity. Bienestar has been active in the Advancing Racial Equity work being undertaken by Vision Action Network, the Coalition of Communities of Color, and other community-based partners. The work being done by VAN should be considered complementary to the Metro Housing Bond implementation that will roll out over the next several years. The impact

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BIENESTAR

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of the Metro Housing Bond represents a once-in-a-lifetime opportunity to promote racial equity in our community through the creation of housing opportunities for low-income families of color. However, this will only be effective if racial equity is made a priority in the implementation of the bond, as promised in the bond's framework and core values.

Thank you for taking the time to read my comments on the second draft of the LIS. I look forward to participating in upcoming meetings and providing testimony when the final draft of the LIS comes before the County Commissioners. Bienestar looks forward to deepening its commitment to providing affordable housing in Washington County as the Metro Housing Bond is implemented.

Sincerely,

Nathan Teske
Executive Director, Bienestar
503-481-0529
nteske@bienestar-or.org

May 20, 2019

Washington County Chair Kathryn Harrington
Board of Commissioners
155 N. First Avenue, MS-21
Hillsboro, OR 97124

RE: Metro Affordable Housing Bond – Local Implementation Strategy

Dear Chair Harrington and Members of the Commission:

I want to thank the Housing Authority of Washington County (HAWC) and County staff for the time and effort put into the County's Local Implementation Strategy (LIS). Given the short time frame in which the LIS came together, we appreciate that significant effort went in to the public engagement strategy and look forward to seeing the next two iterations before the draft is finalized. We also know that the engagement strategy is ongoing and that the plan specifically spells out additional checkpoints that will allow the plan to "trued up" as needed.

A key stipulation of the bond is to ensure positive outcomes in serving culturally-specific populations. CASA of Oregon has been serving communities of color in the county for more than three decades and is looking forward to working to ensure the equity work undertaken by the county will serve many of these populations.

We want to make sure that the populations that are typically least likely to be served by the county have an opportunity to:

- participate in the county's analysis of need,
- are included in marketing efforts,
- are considered when planning for all aspects of the housing,
- apply for the housing and are not immediately "screened out" by high barriers or culturally inappropriate management companies
- are considered when designing services and
- are eligible to receive culturally appropriate services

HOMEOWNERSHIP

A key to closing the disparity in wealth between whites and people of color (POC) is giving POC the opportunity to gain wealth via homeownership. Since advancing racial equity is a priority for implementation of the bond proceeds, providing home ownership opportunities is one of the best ways to achieve it. Yet homeownership is barely mentioned in the first draft of the LIS When it is

mentioned in the introduction, it is only identified as a "potential" There is additional language that alludes to the "possibility that homeownership units may be supported" but no language that shows the county is serious about closing the racial wealth gap via homeownership.

We think the plan needs to specifically call out homeownership and to put some numbers on it. By ignoring homeownership as a strategy within the plan, the county is missing an opportunity at truly creating equity for communities of color. While the investment per unit for home ownership might be higher than for rental units, the trade-off is worth it. The studies are clear of the benefits of homeownership not only as a wealth-building tool but also in the social outcomes of children and the civic engagement of owners. Homeownership is a tool that the dominant culture has been able to avail itself of and one that COC have been systematically been denied access to.

The HAWC has a self-sufficiency program where it's clients can access funds to use for homeownership. In addition, a number of organizations in the county provide homeownership via Individual Development Accounts. The plan should identify these additional funding sources and the opportunity they present to be coupled with the bond money for homeownership.

CASA also assists residents in manufactured home communities (MHCs) to purchase their communities and own them as resident-owned cooperatives (ROCs). The ROCs serve a majority of folks earning at or below 60% of AMI. A significant number are also at or below 30%. This makes calling out the preservation of MHCs a particularly appropriate strategy for serving the households being targeted by the bond.

We believe that there are many opportunities within the LIS to call out homeownership as an opportunity to advance racial equity. We encourage the county to be explicit about why some of the bond funds must be committed to the creation and preservation of home ownership.

RESOURCING SERVICE PROVIDERS

A key to successful projects, particularly serving the population envisioned by the bond (ie, those earning less than 30% and POC) means that projects will need to resource culturally-specific and culturally-serving organizations. These are the organizations that will do the outreach, service provision, assist in lease up and other activities that will lead to successful outcomes.

While the plan talks about " …(utilizing) its project-based vouchers in different ways to leverage and support providers who can bring services to the table" and the goes on to also state that the "provision of supportive services is essential", the plan does not detail what this means. Without clarity on how services are to be provided, they are likely to be the first thing cut from a budget.

Service provision must be a priority and should be clearly spelled out who is providing the services and what those services entail and how those services will be resourced.

There is further discussion in the plan about the "formation of culturally specific partnerships" and the "linking of supportive services" yet no actual promises are made to pay for either of these. Without any promises to actually resource this work, culturally-specific and culturally-serving organizations will likely be asked do the work for little or no money. This is stark contrast to a discussion about the *Organizing Plan for Implementation* which discusses resourcing the HAWC but says nothing about resourcing the existing local community non-profits and the organizations that are currently providing supports.

Community Engagement: We are pleased that the county is looking at community engagement as an ongoing strategy. We anticipate that this strategy will continue beyond the life of the bond as the need for culturally specific services will continue long into the future.

- The County's plan to contract engagement services is welcome. We hope that this means using organizations that are already respected in the community and that have the culturally-specific lens necessary to make the engagement meaningful.
- In our experience of developing housing for farmworkers and their families, each stage of the housing development process requires an equity lens:
    - the community engagement strategy to determine where and what to build
    - the process of designing the buildings
    - the engagement of community organizations to provide services
    - the marketing plan for the units
    - the low-barrier screening process
    - the implementation of the screening process and ultimate rent up.

Without being intentional at all of these stages, the default option is that the units will end up being occupied by the dominant population. Please include in the plan that local organizations will be resourced and deliberate and intentional steps will be taken to use an equity lens on each housing project.

Thanks for the opportunity to comment and we look forward to continued discussions on how to deploy this significant new resource in Washington County.

Kind Regards,

Peter Hainley
Executive Director

Community Housing Fund
3700 SW Murray Blvd., #190
Beaverton, OR 97005
503.846.5790

May 6, 2019

Washington County Chair Kathryn Harrington
and Board of Commissioners
155 N. First Avenue, MS-21
Hillsboro, OR 97124

RE: Comments of Draft 1/Metro RAHBP, Washington County LIS

Dear Chair Harrington and Members of the Board:

Thank you for this opportunity to comment on the first draft of the County's Local Implementation Strategy (LIS) for the recent Metro housing bond. We sincerely appreciate the amount of work that multiple departments and jurisdictions have put into this draft strategy over the past six months. We know that you will have a relatively short time to review drafts prior to finalization and submission to Metro in June. We are pleased to see that there will be at least two additional checkpoints for you as bond experience is accumulated and needs reports are updated over the next five years.

There is no doubt that meeting the targets outlined in the LIS will be a heavy lift that will require a variety of existing and new resources. As a long-term Washington County partner in the housing arena, the Community Housing Fund (CHF) looks forward to both the challenges (increased housing production and services alignment) and opportunities (to create minority contracting targets, increase culturally specific outreach and services, revise tenant screening criteria)—which will help us address many of the historic inequities that our housing policies at the local, state and federal levels have created and reinforced.

We have several comments for consideration as you move forward with the LIS:

Community Engagement: We appreciate the new and additional community engagement strategies the County is employing, on a broader basis, and for the LIS in particular:

- The County's new consolidated on-line calendar is a valuable tool and adding the housing bond to the County's home page makes comment opportunities much more visible—which is appropriate given the level of resources being deployed.
- With the LIS Phase I outreach, staff visited a wide variety of groups at their regular meeting times during the day. Most of these meetings took place before a draft LIS was available, so we are pleased that DHS/HAWC has arranged another meeting for housing sponsors next week to provide more detailed feedback.

- Most County boards and commissions meet during the day. For cities within the county, boards and commissions more frequently meet in the evening, with "technical advisory committees" of stakeholder held during the day. This may impact the breadth of involvement. Some cities have reported that 40% of recent applicants to boards and commissions have self-reported as members of communities of color. With commitment to programs such as Civic Leaders, it appears the County's diversity on boards and commissions will similarly grow. At least one well-advertised evening or weekend open house or public hearing related to the LIS would go a long way towards demonstrating the County's intentionality in gathering the broadest feedback.

Project Selection Criteria: Given the variety of priorities under consideration, the 8-10 projects anticipated with this funding may not fall into any particular areas related to need, geography, or target population. This is not a new dilemma—housing policies at local, state and federal levels have historically struggled with preferences to target resources to particular communities (i.e. areas with minority or poverty concentrations) vs. the desire to building housing in areas of high opportunity. Hence, the question asked repeatedly during Phase I outreach: If housing prices were not a barrier, which community would you choose to live in?

- Given higher need estimates in certain communities (i.e. Tigard and Forest Grove), it might be appropriate to provide geographic preference points that would prioritize some resources. Since we know a beta project is currently under review in Tigard, this may happen organically, but is an important consideration.

Threshold Requirements:

- 10% MWESB is a lower target than many other jurisdictions will establish for Metro bond funds. While this is a new arena for contractors working in Washington County, setting a stretch goal may be what is needed to achieve real change. We know that the current beta project would be built by a sponsor who has set a voluntary target of 20%, by a contractor who has often exceeded that on other projects. We would prefer to see this set at 20%.
- Affirmative outreach and marketing, as well as revision of screening criteria will require extensive work with sponsors and management agents. Some of the administrative resources associated with the bond will likely need to be targeted to this work.

Competitive Selection Criteria:

- Nonprofit Preference: We appreciate the preference for nonprofit sponsors, particularly for special needs projects, but want to ensure that consideration is given to both the housing and services budgets to make sure these projects are "whole" and can function successfully for the long run. It would be unfair and unwise to assume nonprofits can/will work to fill gaps not filled by the bond or County.
- Permanent Supportive Housing: Reflecting on the Tri-County Report, we know how important the coordination of resources is for successful PSH. We would like to see a definitive link between the bond resources and the development of these units. Services required for this population go beyond those provided "in general" for units targeted to those at 30% of area median income and below.
- Culturally Specific Services: We lack a strong infrastructure in Washington County, especially in the property management arena for marketing to diverse populations. With the County's

leadership in this arena, this will need to focus on grassroots distribution of information, not depending on the usual print and electronic.

- Universal Design: How will we increase the number of accessible and visitable units through the development of bond projects? Will this be based on education and outreach, preference points?

Maximizing Non-Competitive Resources:

This is a good approach, but with 8-10 projects we know there will be a variety of financing plans, some including competitive resources (9% LIHTC, HOME), and others structured solely with local incentives and Metro and 4% bonds. Maintaining a pipeline of "other" projects may be challenging, given that we know there will be gaps to fill even in these "non-competitive" models. The County's Housing Production Opportunity Fund is a more critical resource than ever, and we appreciate your creation of this critical resource a few years ago. We support an increased allocation in this year's County budget.

In short, we look forward to continued discussion on this exciting new resource in Washington County, and how it can most effectively be deployed. We know that staff are working hard with limited resources and a short time frame.

We look forward to partnering with you, and the Cities of Beaverton and Hillsboro, to develop thousands of new homes in the coming decade, many of which would not have been possible without the Metro housing bond. We know there are many stretch goals and new initiatives to refine to ensure that the funds address longstanding racial disparities in our housing markets. As Washington County's Vision notes: "…the fulfillment of our community vision will require governments, business, nonprofits, religious and civic organizations to align passion and resources to serve our community…" The Metro bond provides an excellent opportunity for us to work towards that end.

Sincerely,

Sheila Greenlaw-Fink
Executive Director

CPAH COMMUNITY PARTNERS FOR AFFORDABLE HOUSING
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June 7, 2019

Washington County Chair Kathryn Harrington
Board of Commissioners
155 N. First Avenue, MS-21
Hillsboro, OR 97124

RE: Metro Affordable Housing Bond – Local Implementation Strategy

Dear Chair Harrington and Members of the Commission:

Thank you so much for the work you are doing to support the development of affordable housing in Washington County. At Community Partners for Affordable Housing (CPAH), we are looking forward to the implementation of the bond, along with other housing resources, to address some of the great need in the community.

CPAH has been part of the Washington County community since 1993 and is dedicated to safe, healthy and sustainable housing for families, seniors and people with disabilities. We are deeply committed to a world of housing justice, where everyone has a safe and healthy home to live in. CPAH has been building and rehabilitating rental housing, managing that housing, and providing service to our residents. We are currently about to break ground (this year) on two projects – one in the Tigard Triangle and the other in Beaverton.

We thank the board and staff for the attention paid to supporting local non-profits in this work. We have been here a long time and our intention is to stay. As a Community Housing Development Organization (CHDO), we take our commitment to Washington as an important part of our organizational goals. We work hard to stay connected to local planning efforts and projects, participating in numerous committee meetings and planning opportunities. We have partnerships with local agencies and service organizations and dedicate time and effort to maintaining those relationships for the benefit to our current residents and future residents.

Along with our appreciation to staff and elected officials for the work that has gone into the Local Implementation Strategy, we have some additional comments and concerns that we would like to share.

1- We are pleased that there is some commitment to working with housing non-profits. In the Local Implementation Strategy (LIS), you call out a set-aside for CHDO's and I understand that may broaden to housing non-profits in general. As a CHDO, we do have a special role to serve this community and to represent low-income people who live here. However, regardless of this, our hope is that any set-aside is a floor, not a ceiling. It is our belief that housing non-profits bring with them rich benefits that include strong partnerships, a commitment to low-barrier housing, and ongoing support for our

community partners in housing efforts. We think that these qualities should assist our organizations in scoring during a selection process. We believe that there are ways to prioritize non-profits that recognize the added important benefits we bring to the projects.

2 - We are very concerned about the long list of projects included in the LIS as an attachment. From this list, it appears that decisions or early commitments have been made to a number of projects. However, based on previous information, we were under the impression that there would be some notice of funding available to the community that would include opportunities to apply. We were also under the impression that there would be a clear and transparent process for most of the funds involved and that funds would be available starting in the late fall or early winter, not all at once.

While we are totally on board with the need for a "Phase One Project", the appearance of early commitments is off key. The overall goals of the Metro bond, including leading with racial equity, are best achieved through open and clear processes. Additionally, we think early commitments do not support the thoughtful portfolio planning approach that the LIS intends, as indicated in the strategy.

3 - We urge the county to be more specific as you think through how to operationalize equity and supportive housing. How will you measure success? These goals will not be achieved simply through intentions. And while priorities are hard to set regarding project selection criteria, without being more specific those priorities will shift to be the easiest projects to complete.

Again, thank you for your efforts, successes with community engagement, and dedication to this issue. The county staff we work with are passionate and believe strongly in the benefits of affordable housing.

We look forward to continuing our long partnership with Washington County.

Rachael Duke
Executive Director

June 11, 2019

Washington County Chair Kathryn Harrington
Board of Commissioners
155 N. First Avenue
Hillsboro, OR 97124

RE: Second Draft of Washington County's Metro Housing Bond Local Implementation Strategy

Chair Harrington and Members of the Commission:

Thank you for your work and for the work of the County staff in drafting the County's Local Implementation Strategy (LIS) for Metro's affordable housing bond. As a coalition of dozens of organizations — many from Washington County — committed to finding dedicated revenue sources that increase the supply of and access to affordable housing, the Welcome Home Coalition is excited to see this work unfold.

In your consideration of potential changes made to the third version of the draft LIS, we would encourage the items below.

1. **Expand housing for our most vulnerable neighbors**

   The current version of the LIS has Washington County aiming to develop 334 units for households at 30 percent area median income (AMI) and below, the threshold identified in Metro's bond framework. This threshold ought to be a floor, and we would encourage the County to look for ways to increase the development of units for our most vulnerable neighbors beyond this threshold.

   Similarly, the current LIS has Washington County developing 407 units with two or more bedrooms. Again, this is the threshold that we would consider a floor outlined in the Metro bond framework. We would urge the County to seek ways to increase this number, as it will be critical for improving housing security for vulnerable families.

   We are glad to see language that projects with higher percentages of units at or below 30 percent AMI or with 2+ bedrooms being given a larger share of available funding. That is a worthy component that we would hope to see in the finalized LIS.

2. **Lead with racial equity**

   Generally speaking, the second draft of the LIS makes improvements on the first version, particularly in the use of more affirming language in the County's commitment to racial equity. As the County aptly notes, Washington County is our state's most racially diverse county. As such, it is particularly critical that Washington County's racial equity plan be one that is actionable and

measurable. There are several ways in which the second version of the LIS could be strengthened to this point.

First, we would urge the County to strengthen its minority, women, and emerging small business (MWESB) goals. We are encouraged to see the County increase its aspirational goal to 20 percent of contracting done with MWESB businesses, but that goal ought to be a standard, not simply aspiration. We should maximize the available bond dollars to their fullest extent by addressing the housing crisis while investing in historically marginalized communities.

Second, the most recent draft of the LIS appears to add additional screening requirements for tenants, particularly by increasing barriers for individuals who have been convicted of a criminal offense. Because of the historical and current systemic racism in our criminal justice system, a disproportionate number of people of color have had involvement with the justice system and thus are disproportionately screened out of housing. We appreciate the effort to reduce barriers to tenant access but feel that the first draft of the LIS tenant screening criteria better advances racial equity, with its emphasis on only considering convictions that may impact tenant success and excluding arrests from consideration. As currently written, the LIS is unclear whether documentation of a disability and evidence of rehabilitation must be shown for all convictions, or only recent ones. We recommend that this language be clarified so that project sponsors must consider the nature of the underlying conduct for any conviction, and limiting the "look-back" period for criminal convictions. By tying consideration of convictions to those which most greatly impact tenant success, the County can better achieve its goal of racial equity.

Lastly, we would urge the County to continue finding ways to conduct outreach to communities of color and culturally-specific organizations. To date, it appears that outreach has been split between service providers and people affected by housing insecurity. We would urge the County to continue outreach to people affected by housing insecurity, particularly those in communities of color, and ensure that outreach is done using materials in people's first languages.

3. CHDO set aside

We were encouraged to see a $25 million set aside for Community Housing Development Organizations (CHDO's) in the most recent draft of the LIS. As you likely know, CHDO's receive their designation in part by having at least one-third of their board made up of representatives of the low-income community. Moreover, CHDO's must create formal processes for input from the communities they serve regarding the design of projects, where they are sited, how properties are managed, and other critical factors. We would hope to see this set aside remain in the final LIS as part of the County's broader equity strategy, as it would ensure a level of community input and control over those projects.

4. Project financing

The current draft of the LIS indicates the County has added 9 percent Low Income Housing Tax Credits (LIHTC) as a possible funding source As you know, 9 percent credits are competitive, and the application process is time consuming. The modeling for the bond was done with the assumption of using only 4 percent LIHTCs and we would encourage the County to not rely too heavily on financing that ultimately might not be available, would take much longer to implement and is a primary source of funding for non-bond funded projects.

5. **Ongoing transparency**

   We are concerned about the contents of Appendix B. It is not clear whether this is indeed the case, but the level of specificity in the table suggests that a process for developing certain projects may already be underway. If that is the case, we would urge the County to pause and allow for the LIS to be finalized, particularly in light of the racial equity goals spelled out in the draft LIS. It is important that those goals be clear and quantifiable prior to any decisions regarding specific projects being made, and it will be crucial that communities feel like they have input into project implementation.

Again, we want to thank you and the County staff for your dedication to this important work. We know this implementation is a major undertaking, and we appreciate your consideration for the items raised above. We look forward to working with you to ensure the successful implementation of these bond dollars.

Sincerely,

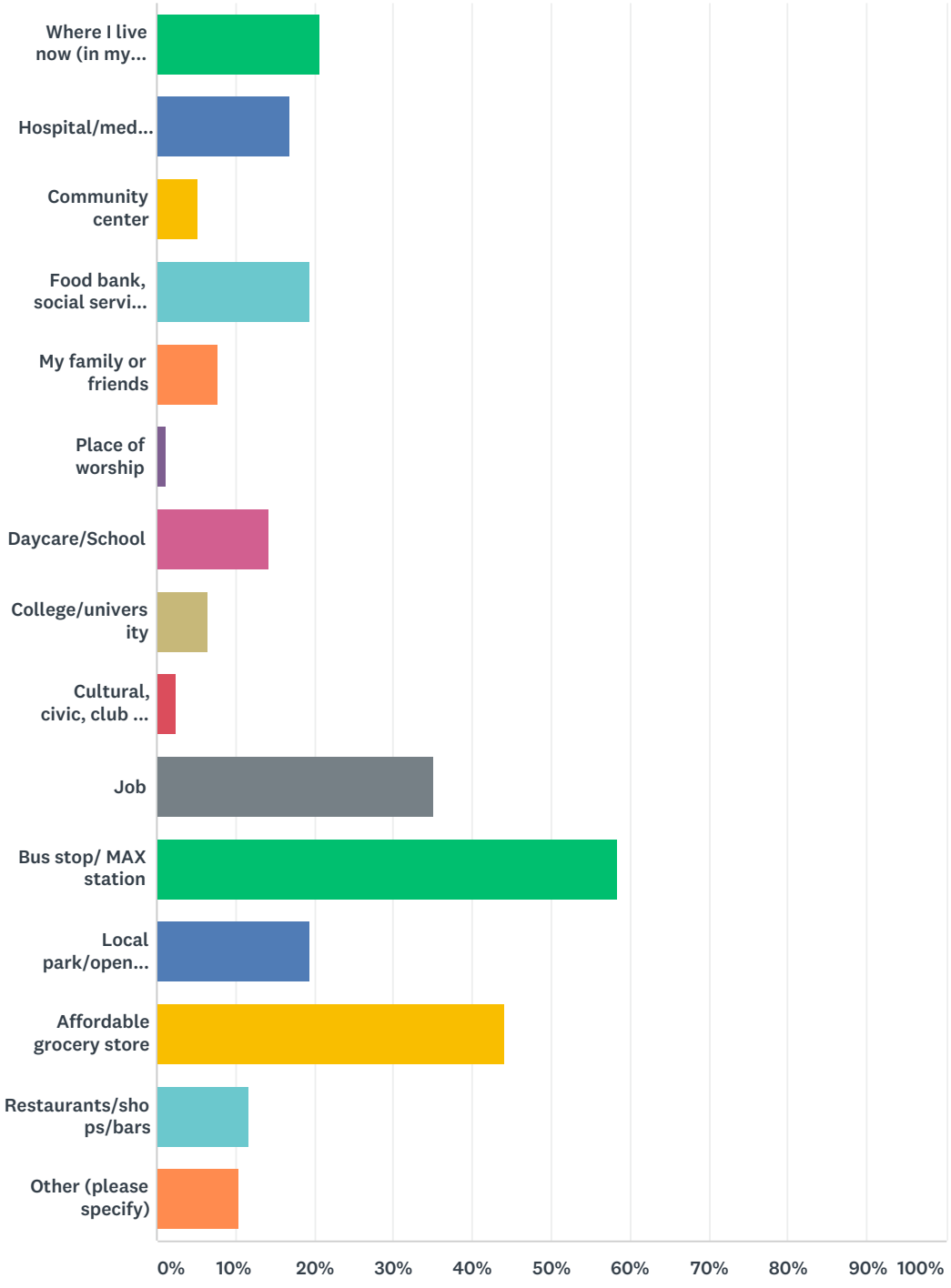
Tyler Mac Innis, Coalition Director

In Spring 2019, Metro conducted a regionwide online survey on housing. 77 individuals from Washington County responded to the survey. Metro has provided the following summary of the survey results for Washington County.

In additional Metro staff also coordinated with the Asian Pacific American Network of Oregon (APANO) to conduct one-on-one interviews with individuals from that community between April 17-April 24. A summary of those interviews is provided following the survey results.

Q1 Why did you pick that location?It is close to (mark your top 3)

Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES	
Where I live now (in my community)	20.78%	16
Hospital/medical office	16.88%	13
Community center	5.19%	4

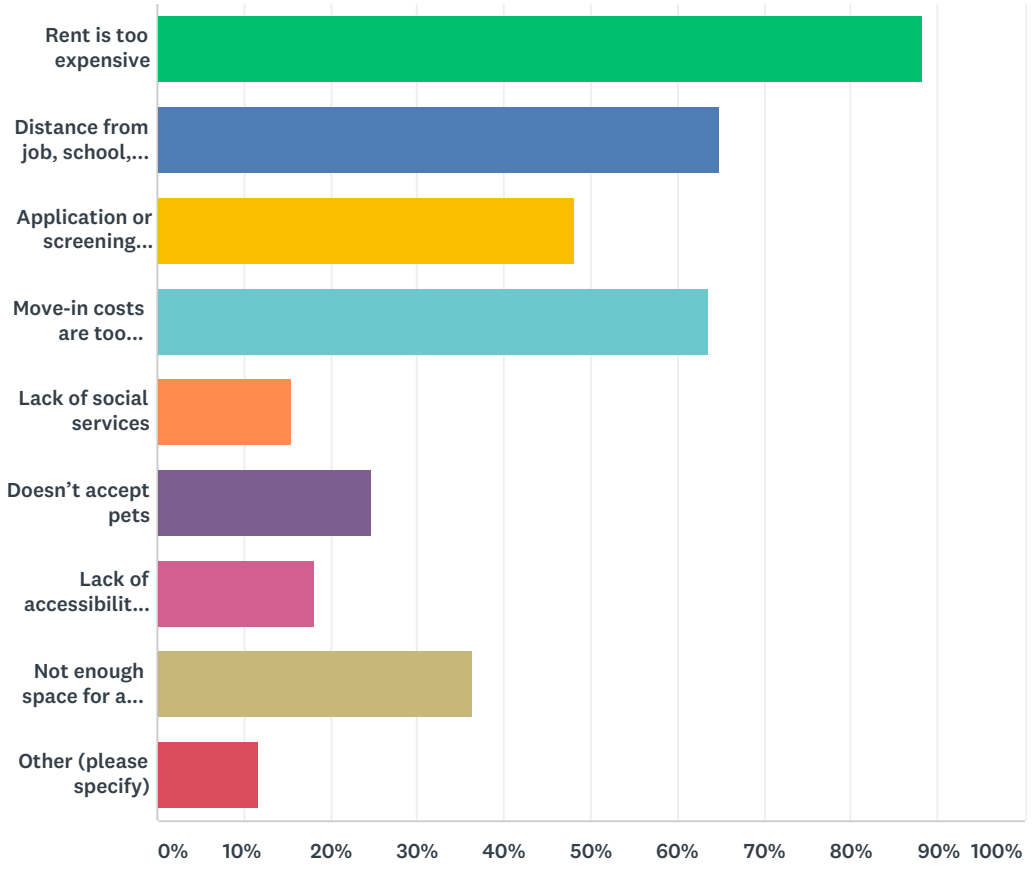
Food bank, social service agency, other service	19.48%	15
My family or friends	7.79%	6
Place of worship	1.30%	1
Daycare/School	14.29%	11
College/university	6.49%	5
Cultural, civic, club or organization	2.60%	2
Job	35.06%	27
Bus stop/ MAX station	58.44%	45
Local park/open space/ trail	19.48%	15
Affordable grocery store	44.16%	34
Restaurants/shops/bars	11.69%	9
Other (please specify)	10.39%	8
Total Respondents: 77		

Q2 What other things about the area you picked (beyond what's close by) make it a good location for new affordable housing?

Answered: 68 Skipped: 9

Q3 What do you think are the biggest challenges people face when trying to find a place to live?

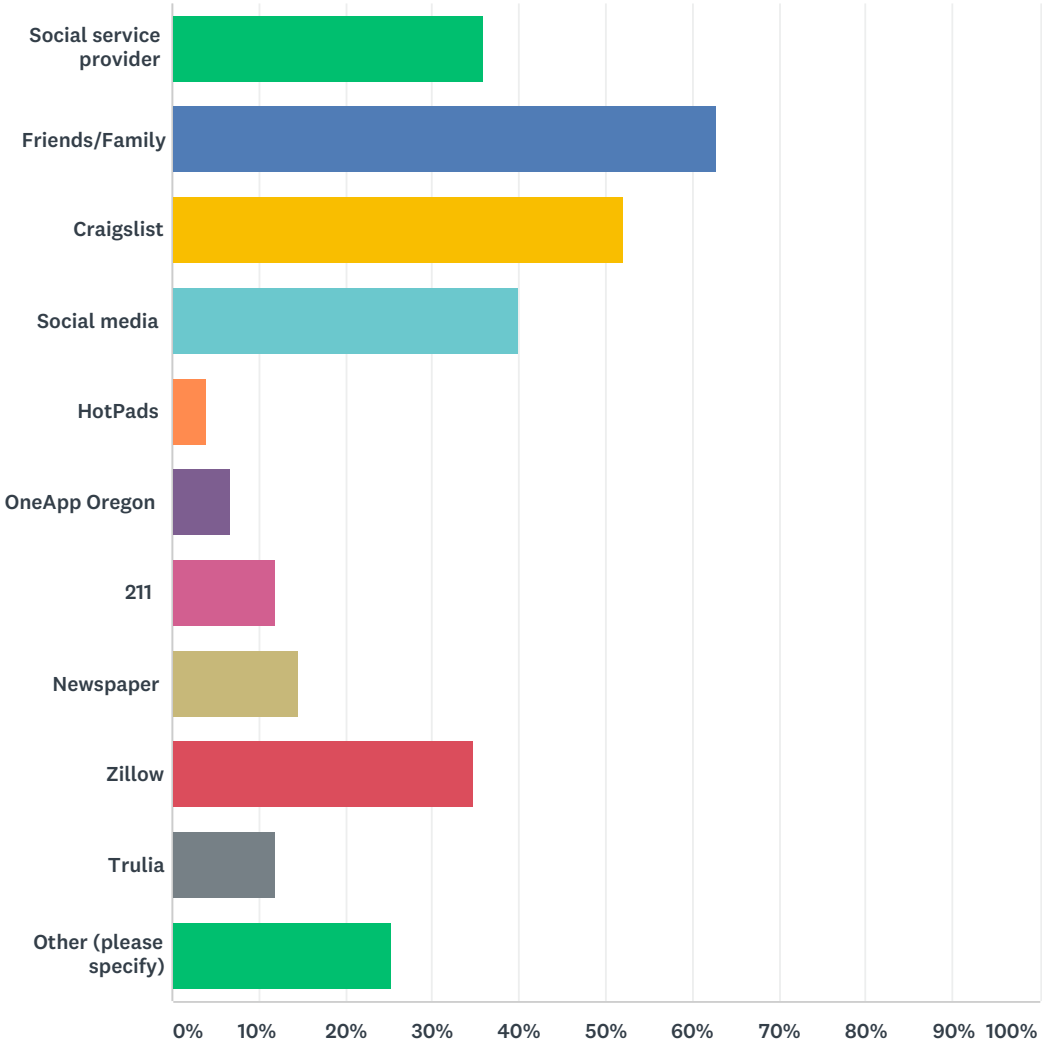
Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES	
Rent is too expensive	88.31%	68
Distance from job, school, friends, family, school, etc.	64.94%	50
Application or screening criteria too strict (income requirements, criminal and credit reports, rental history, etc.)	48.05%	37
Move-in costs are too expensive	63.64%	49
Lack of social services	15.58%	12
Doesn't accept pets	24.68%	19
Lack of accessibility for people with disabilities	18.18%	14
Not enough space for a family	36.36%	28
Other (please specify)	11.69%	9
Total Respondents: 77		

Q4 How do people find available housing?

Answered: 75 Skipped: 2

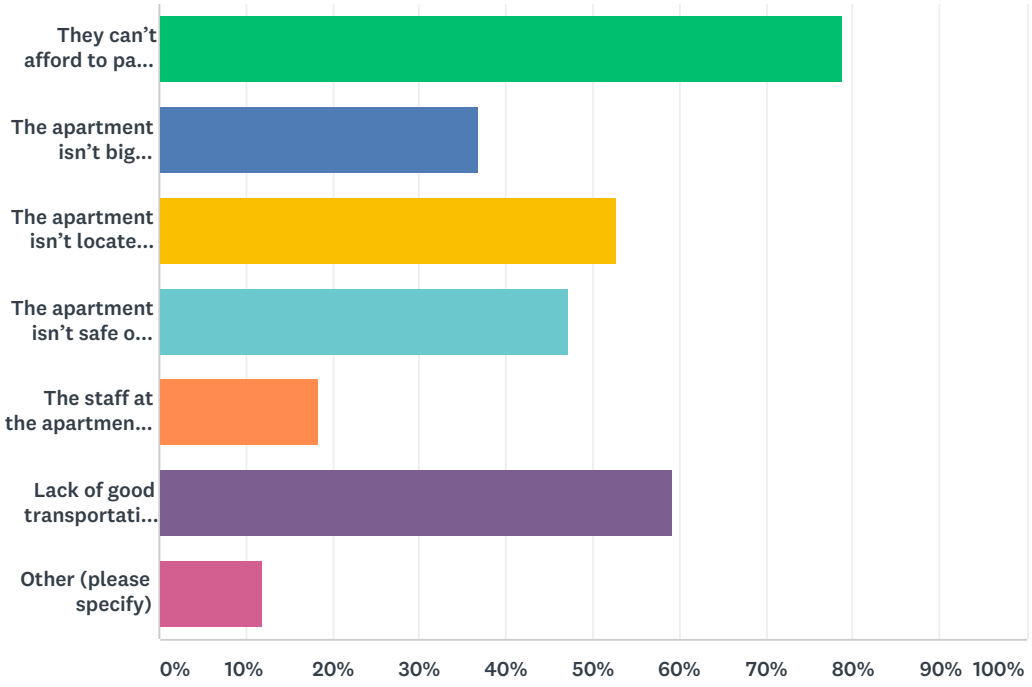


ANSWER CHOICES	RESPONSES	
Social service provider	36.00%	27
Friends/Family	62.67%	47
Craigslist	52.00%	39
Social media	40.00%	30
HotPads	4.00%	3
OneApp Oregon	6.67%	5
211	12.00%	9
Newspaper	14.67%	11
Zillow	34.67%	26
Trulia	12.00%	9

Other (please specify)	25.33%	19
Total Respondents: 75		

Q5 What do you think are the biggest challenges that make it difficult for people to stay in affordable housing?

Answered: 76 Skipped: 1



ANSWER CHOICES	RESPONSES	
They can't afford to pay the rent	78.95%	60
The apartment isn't big enough for a family	36.84%	28
The apartment isn't located where they want to live	52.63%	40
The apartment isn't safe or habitable	47.37%	36
The staff at the apartment aren't able to provide enough support to the person/family	18.42%	14
Lack of good transportation options	59.21%	45
Other (please specify)	11.84%	9
Total Respondents: 76		

Q6 What types of services, programs, and/or support are needed to overcome these challenges?

Answered: 64 Skipped: 13

Q7 What other advice do you have for housing providers to make sure the people who most need affordable homes can be successful?

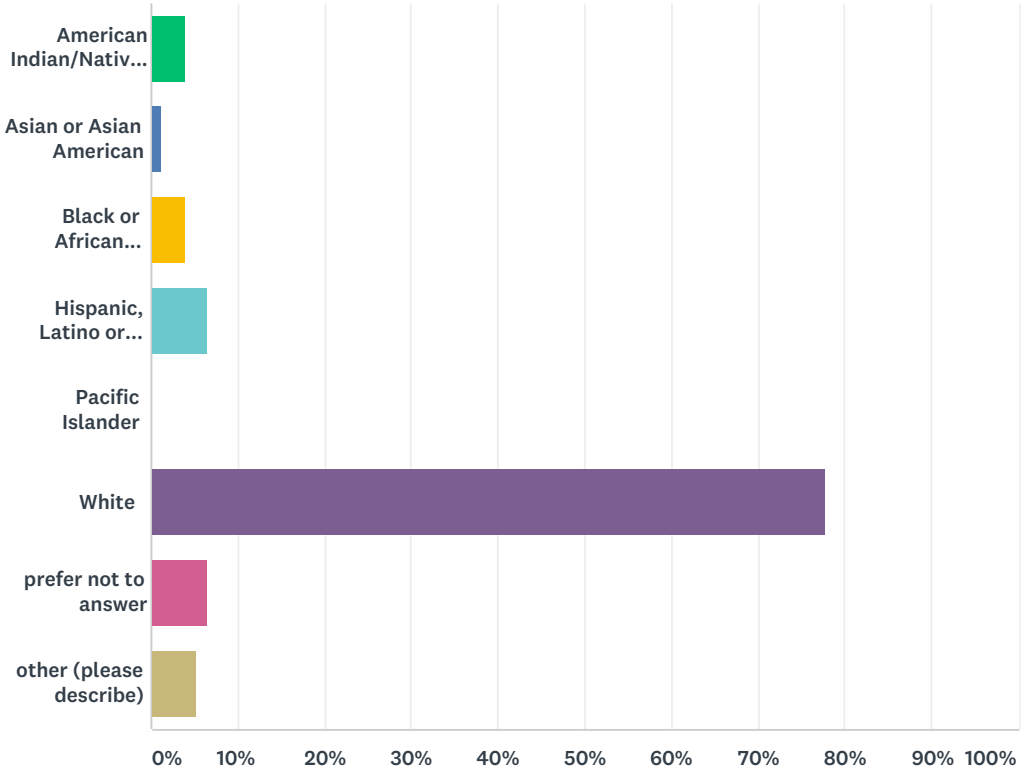
Answered: 59 Skipped: 18

Q8 What is your current zip code?

Answered: 77 Skipped: 0

Q9 When asked about your racial or ethnic identity, how do you identify?

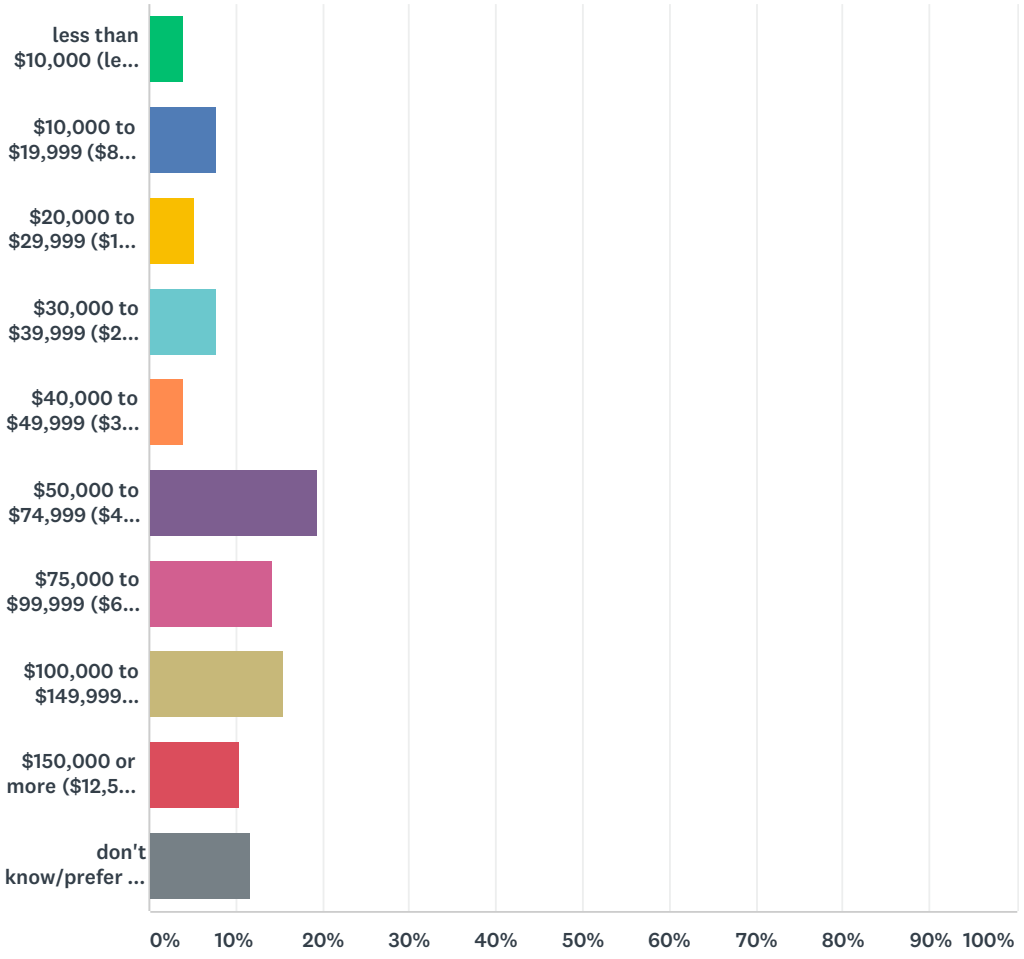
Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES	
American Indian/Native American or Alaska Native	3.90%	3
Asian or Asian American	1.30%	1
Black or African American	3.90%	3
Hispanic, Latino or Spanish origin	6.49%	5
Pacific Islander	0.00%	0
White	77.92%	60
prefer not to answer	6.49%	5
other (please describe)	5.19%	4
Total Respondents: 77		

Q10 Which of the following best represents the annual income of your household before taxes?

Answered: 77 Skipped: 0

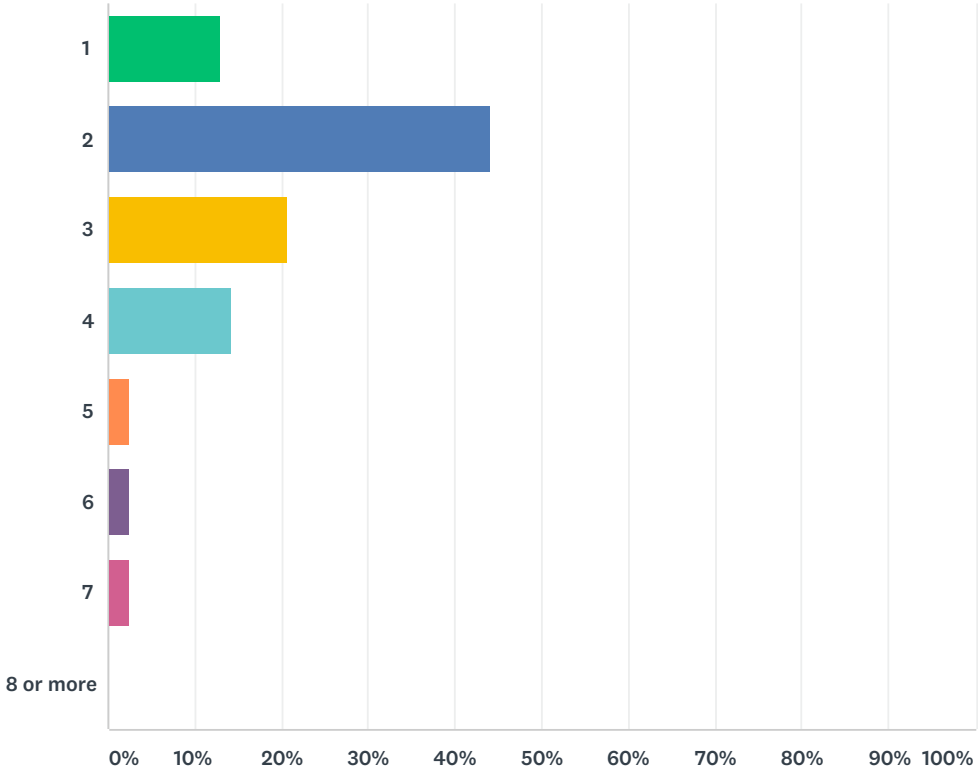


ANSWER CHOICES	RESPONSES	
less than $10,000 (less than $833 per month)	3.90%	3
$10,000 to $19,999 ($834 to $1666 per month)	7.79%	6
$20,000 to $29,999 ($1667 to $2499 per month)	5.19%	4
$30,000 to $39,999 ($2500 to $3333 per month)	7.79%	6
$40,000 to $49,999 ($3334 to $4166 per month)	3.90%	3
$50,000 to $74,999 ($4167 to $6249 per month)	19.48%	15
$75,000 to $99,999 ($6250 to $8333 per month)	14.29%	11
$100,000 to $149,999 ($8334 to $12499 per month)	15.58%	12
$150,000 or more ($12,500 or more per month)	10.39%	8
don't know/prefer not to answer	11.69%	9

TOTAL	77

Q11 How many people live in your house (including yourself)

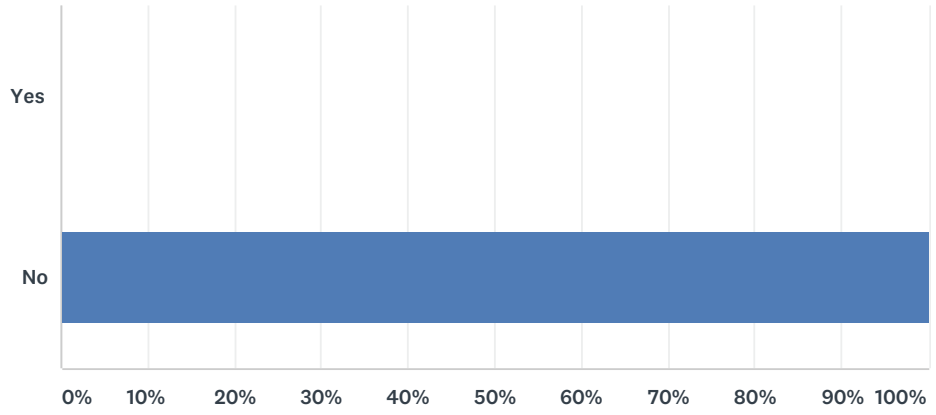
Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES	
1	12.99%	10
2	44.16%	34
3	20.78%	16
4	14.29%	11
5	2.60%	2
6	2.60%	2
7	2.60%	2
8 or more	0.00%	0
TOTAL		77

Q12 Do you currently live in income-restricted affordable housing?

Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	0.00%	0
No	100.00%	77
TOTAL		77

Q13 To be entered in a raffle for two tickets to the Oregon Zoo, share your email address.

Answered: 50 Skipped: 27

ANSWER CHOICES	RESPONSES	
Name	0.00%	0
Company	0.00%	0
Address	0.00%	0
Address 2	0.00%	0
City/Town	0.00%	0
State/Province	0.00%	0
ZIP/Postal Code	0.00%	0
Country	0.00%	0
Email Address	100.00%	50
Phone Number	0.00%	0

APANO
COMMUNITIES UNITED FUND

What: Summary of 7 one-on-one interviews based on questions from Metro regarding housing, transportation, and parks
Who: Interviews conducted by Jairaj Singh - Community Outreach Manager at APANO - with South Asian identified adults in Washington County, Oregon
When: Interviews conducted between April 17th - April 24th, 2019

Questions/Topics and Responses:

What makes a place great?

- Walking distance to work and access to public transit
- Ease of access to workplace, grocery store, recreation activities, close to friends, and airport
- Any place that meets children's needs, an area that also suits families, young professionals, and couples with no kids
- Quality schools, opportunities for after school activities, recreational centers, mixed use and also single family homes, places to volunteer, stores for all income levels, diverse housing
- Access to quality parks, libraries, places to gather and celebrate events - festivals and markets - developments such as Orenco station - T.O.D. sites
- Lack of traffic congestion and close to nature

Housing

How do people in your community find affordable housing?

- “Generally hard to find”, internet, real estate agents, city resources, or drive around different places

What are the biggest challenges people face when trying to find a place to live?

- Minumum income requirements, past circumstances, high cost of housing/rent, property taxes are too high, and discrimination for loan approvals

What are the biggest challenges people face when trying to find a place to live?

- Not having a steady employment and paycheck, lack of financial resources and support - ex. those in retirement
- Past or changing circumstances - health issues, loss of job, rise in cost of housing, as well as property taxes and utilities, more wealthier people moving in and displacing lower-income residents

APANO
COMMUNITIES UNITED FUND

What services, programs, and/or support are needed to overcome these challenges?

- Housing resource centers that are quick, efficient, and practical for community members and immigrants seeking stable housing - making mortgages possible
- More governmental/professional advocates, policy changes - especially around zoning laws and regulations in order to allow for the development of community centers and affordable housing in communities of color
- Rent assistance programs, stop-gap measures on property taxes for long-time owners
- Language translation and interpretation, support with technology, financial literacy - especially around refinancing

Parks

- Funding for the long-term ranked the highest on average for the one-on-one interviews conducted, specifically making playgrounds with environmentally friendly materials and use displays to teach visitors about nature and how to protect it for future generations
    - This criteria was followed by: Reduce Pollution, Disability Accessibility, Metro Destinations, Contracting

Transportation

- **What makes trips difficult or uncomfortable?**
    - Traffic congestion at peak hours and length of commute
    - Low frequency of buses and overcrowding, lack of connectivity and affordability in regards to public transit
    - Lack of separated sidewalks
    - Concern for houseless population on trails

- Cleaner buses: replacing diesel buses with clean and quiet electric buses ranked on average the highest from the one-on-one interviews - the main concern is that it is expensive and should not be funded on the backs of low income residents

- Safety improvements: wider and separated sidewalks, more bus shelters to protect from cold and rain

- Technology: wifi at transit stops was not a priority, but expanding the use of traffic lights that work together to keep traffic moving, and more time for elderly to cross through crosswalks

- During several interview discussions there was a general need and demand for a more extensive, affordable, comfortable and efficient public transit system

Appendix D – Glossary

Accessory Dwelling Unit (ADU)
An ADU is a second living unit, limited in size, allowed with a single family home. ADUs may be built within a primary residence (as in an attic or basement), attached to the primary residence (an addition), or detached from the primary residence (such as conversion of a detached garage or construction of a new free-standing unit).

Affordable housing
Housing is considered affordable when housing costs total no more than 30 percent of the household's gross income. Housing costs include: rent or mortgage payments (including insurance and taxes), and basic utility costs (electricity, water, garbage, etc.).

Appropriately zoned
Property that is zoned for the intended use versus requesting a zoning change which can be time consuming and costly.

CHAS data
CHAS stands for Comprehensive Housing Affordability Strategy. These data are comprised of custom tabulations of American Community Survey (ACS) data from the US Census Bureau and are received annually by the US Department of Housing and Urban Development (HUD). These data demonstrate the extent of housing problems and housing needs, particularly for low-income households.

Chronically homeless
Chronically homeless means: (1) A ''homeless individual with a disability,'' who: (i) Lives in a place not meant for human habitation, a safe haven, or in an emergency shelter; and (ii) Has been homeless continuously for at least 12 months or on at least 4 separate occasions in the last 3 years the combined occasions equal at least 12 months; (2) An individual who has been residing in an institutional care facility, including a jail, substance abuse or mental health treatment facility, hospital, or other similar facility, for fewer than 90 days and met all of the criteria in paragraph (1) of this definition, before entering that facility; or (3) A family with an adult head of household (or if there is no adult in the family, a minor head of household) who meets all of the criteria in paragraph (1) or (2) of this definition, including a family whose composition has fluctuated while the head of household has been homeless. (24 CFR 578.3)

Community engagement
Community engagement is a way of developing a working relationship between public bodies (such as local governments) and community groups.

Consolidated Plan
The Consolidated Plan is a five-year housing and community development strategic plan that is based on quantitative and qualitative data collection combined with community engagement (involving county departments, city partners, state agencies, non-profit partners and community members) to inform how to best utilize the scarce federal resources over the five year period. The U.S. Department of Housing and Urban Development (HUD) requires that jurisdictions receiving Community Development Block Grant (CDBG), HOME Investment Partnerships and Emergency Solutions Grant program funds produce the Consolidated Plan in order to receive their federal funding allocation.

Culturally specific
The term is used usually in connection with a "thing" such as "outreach" or "services" and means that the outreach or services are designed for and conducted by the cultural group being targeted.

Density bonus
A density bonus allows a greater number/percentage of dwelling units on a site than code standards would normally allow. When a jurisdiction allows a density bonus it is commonly in exchange for a developer's commitment to provide a share of affordable housing units and/or certain other amenities intended to benefit the public. If affordable housing is the goal, some jurisdictions may pair the density bonus allowance with other incentives such as reduced development fees.

Fair Housing Act
The Fair Housing Act, or Title VIII of the Civil Rights Act of 1968, originally prohibited housing discrimination based solely on race, color, religion or national origin. In 1988, Congress expanded the law to include people with disabilities as a protected category within the terms of the Fair Housing Act.

Fair market value
The price a property would sell for on the open market, which is based on an appraisal comparing the values of other similar, nearby, recently sold properties.

Gentrification
Most often defined as redevelopment of deteriorating neighborhoods that results in displacement of current residents (who often represent lower income and/or minority populations) by more affluent residents. Some research suggests that gentrification does not always result in displacement and other factors can be at play, such as existing resident incomes rising, higher income housing is built in deteriorating neighborhoods, or low income residents moving out due to regular reasons such as marriage/divorce, job change, children, etc. (A Picture of Gentrification, December 2017, Reid Ewing, Planning Magazine) although there are many who disagree with this research.

HUD
The U.S. Department of Housing and Urban Development, which oversees the Community Development Block Grants (CDBG), HOME, Public Housing and Housing Choice Voucher programs, to name a few.

Low-income household
As widely defined by governmental and nonprofit organizations, a household with an income at or below 80 percent of area median income. The numbers are determined by HUD and adjusted for family size. See "Median Family Income."

Low Income Housing Tax Credit (LIHTC)
A tax incentive created in the Tax Reform Act of 1986 that is designed to attract equity capital for investment in rent restricted affordable housing. The program encourages the production of affordable housing by offering owners tax credits for a ten year period based on the cost of development and the number of low income units produced.

Market rate housing
Rental or for-purchase housing that is not regulated by a government agency and the market determines the price.

Median Family Income (MFI)
A term used by most federal programs to describe published income standards for various areas of the country that are used as benchmarks for determining households' eligibility for federally funded programs. "Median" means that half of all households in the area are estimated to have more than this amount of income and half have less; a household is everyone living within the home and they do not have to be related. Washington County is in the Portland-Vancouver-Hillsboro OR-WA Metropolitan Statistical Area which consists of Clackamas, Columbia, Multnomah, Washington, and Yamhill Counties in Oregon, and Clark and Skamania Counties in Washington.

Permanent Supportive Housing (PSH)
Low-barrier, deeply affordable housing with supportive services to help people live with stability, autonomy and dignity. Supportive housing is for highly vulnerable people who have complex health needs, including those with untreated or undertreated mental illness and addictions and have long-term homelessness in their background. Qualification to live in the housing does not expire after a certain amount of time therefore the housing in permanent.

Project Based Voucher (PBV)
Project Based Vouchers (PBVs) are part of the Housing Choice Voucher Program, which is the federal government's major program providing rental assistance to eligible families, the elderly, and the disabled that allows them to rent units in the private rental market. Housing choice vouchers are administered locally by public housing agencies. The subsidy is paid directly to the landlord and the difference is paid by the tenant. Project based vouchers are issued to a specific property and the project based units are rented to income qualified families. The voucher stays with the property whose construction and/or operations are usually funded through local, state and federal programs and already has rent restrictions. The project based vouchers allow these properties to serve people and families at extremely low incomes (<30 percent MFI).

Project cost efficiency
Instituting best practices in order to build affordable housing at a lower cost without sacrificing quality.

Racial equity
Inequity that results from structural racism (policies, practices and cultural norms). When skin color no longer determines socioeconomic outcomes, racial equity will be achieved.

Equitable Housing
Diverse, quality, physically accessible, affordable housing choices with access to opportunities, services and amenities.

Equity
Addressing people where they are at and providing what is needed to be successful. Often described along with equality, which gives everyone the same assistance whereas equity acknowledges people are starting from different places and people need differing levels of help to in order to succeed.

Regulated affordable housing
Income-restricted or regulated housing, generally funded by state, local or federal government, that is available only to residents who earn less than the area median income (AMI), usually 60 percent AMI, but sometimes up to 80 percent AMI.

Rental assistance
Participants pay a portion of their adjusted gross income (i.e. income after standard deductions) for rent and the remainder of the rent is paid by a voucher that is funded by local, state, federal, or sometimes private, funding sources. Examples are Section 8, Housing Choice Vouchers, and short term rental assistance that prevents eviction and homelessness.

Resident services
Services available to residents of "regulated affordable housing" that are often required by government funders when they supply construction and/or operating funds for a project. Services provided can include classes such as how to balance a budget or be a good renter, how to cook healthy meals, after school homework clubs and mobile medical exams.

Section 8
One of the Housing Choice Voucher Program Voucher programs in which participants pay a portion of their adjusted gross income (i.e. income after standard deductions) for rent and the remainder of the rent is paid by HUD. Section 8 is either project based or tenant based. See "Housing Choice Voucher Program."

System Development Charges (SDCs)
A system development charge is a one-time fee imposed on new development to equitably recover the cost of expanding infrastructure capacity to serve new customers. SDCs are not taxes—they are collected for a specific purpose and provide a distinct benefit to the persons who pay the fee. SDC revenue is restricted by statute, and SDC revenue must be used to provide needed capital improvements. SDCs are generally paid at the same time as development permits.

Target population
The people for whom housing is intended whether the criteria is income based, such as <60% MFI, or a population based such as farmworkers or those with Severe and Persistent Mental Illness (SPMI).

Trauma informed outreach
Trauma informed engagement opportunities and environments allow for the acknowledgment of the existence of community-level trauma which stems from historic and structural conditions of racism, disenfranchisement, and isolation and encourages transparency about what partners representing traditional positions of power (such as government agencies) are offering or asking. Examples of trauma informed engagement opportunities might include: acknowledgment of harm done in the past; ensuring consistency with process; peer to peer approaches and/or facilitation by peers; and, barrier free participation such as location (government building vs. library or community center), childcare, accessibility, and compensation.

METRO HOUSING BOND OVERSIGHT COMMITTEE

July 24, 2019

COMMITTEE RECOMMENDATIONS AND CONSIDERATIONS RELATED TO THE CITY OF BEAVERTON AND WASHINGTON COUNTY LOCAL IMPLEMENTATION STRATEGIES

BEAVERTON

The Oversight Committee recommends that Metro Council take action to approve the City of Beaverton's Local Implementation Strategy (LIS). The Committee has identified the following considerations specific to the City of Beaverton's ongoing implementation and monitoring of outcomes:

- The City should further define strategies and outcomes that will be measured to demonstrate the advancement of racial equity, including low-barrier screening criteria, affirmative marketing, universal design, voucher prioritization, wraparound services, and contract and workforce diversity.
- The City should incorporate findings from the 2015 Meyer Memorial Trust study on cost efficiencies in affordable housing in evaluating project costs.

The Oversight Committee has requested an early response from the City of Beaverton regarding the considerations above and ongoing updates as part of the City's annual LIS progress report. The Oversight Committee expects to address these considerations in its annual LIS review.

WASHINGTON COUNTY

The Oversight Committee recommends that Metro Council take action to approve Washington County's Local Implementation Strategy (LIS), subject to the County's revision of language related to screening criteria on Pg. 15, section B, item ii, as discussed during the July 24th meeting. The Oversight Committee will be reviewing and approving the revised language at their August 7th meeting. The Committee has identified the following considerations specific to Washington County's ongoing implementation and monitoring of outcomes:

- The County should further define strategies and outcomes that will be measured to demonstrate the advancement of racial equity, including low-barrier screening criteria, affirmative marketing, universal design, voucher prioritization, wraparound services, and contract and workforce diversity.
- The County should provide further clarification regarding intentions for geographic distribution as part of project solicitations.
- The County should provide a plan and measurable outcomes that demonstrate progress toward reaching the 20% MWESB participation goal.

The Oversight Committee has requested an early response from Washington County regarding the considerations above and ongoing updates as part of the County's annual LIS progress report. The Oversight Committee expects to address these considerations in its annual LIS review.

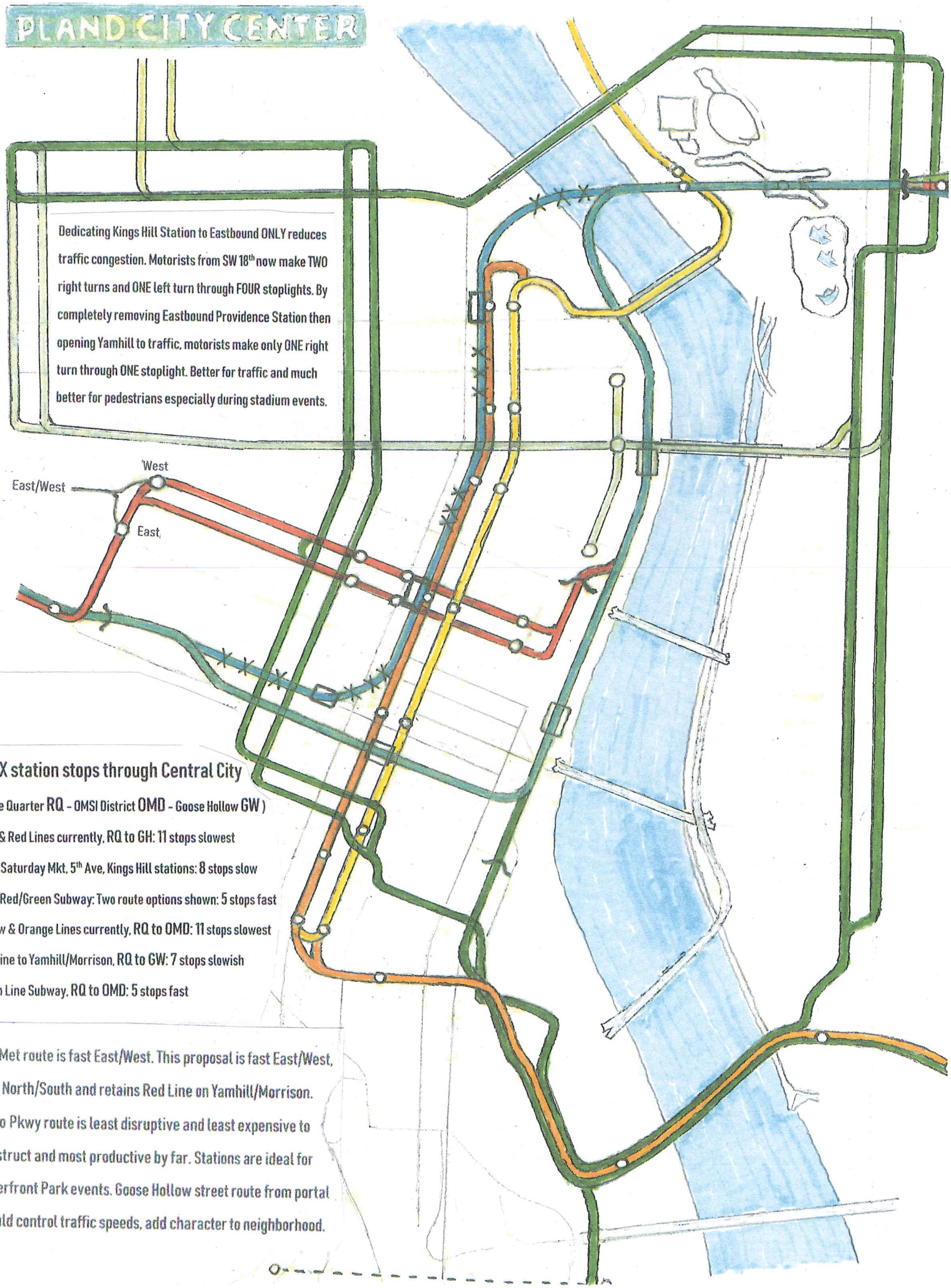
Additional Guidance for All Jurisdictions

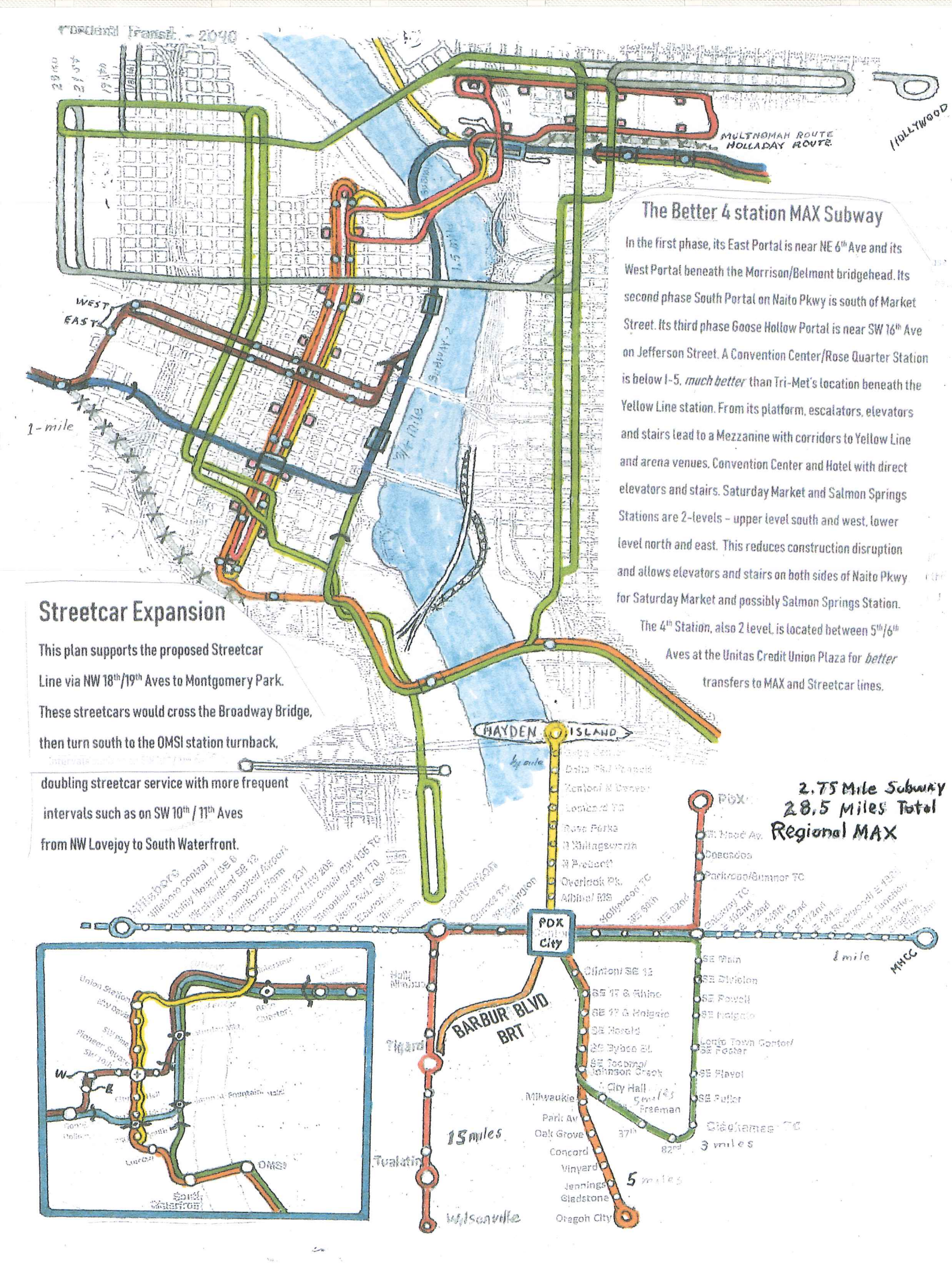
In addition to the above listed considerations, Committee members offered the following considerations for all jurisdictions participating in implementation of the Housing Bond. These considerations may be further refined as the Committee discusses Local Implementation Strategies from other jurisdictions in coming months:

- Use language that acknowledges intersectionality of populations; avoid differentiating between homelessness, disabling conditions including physical and mental health, and addiction.
- Identify screening criteria not relevant to likelihood of successful tenancy that should not be considered.
- Additional resources need to be identified to successfully serve tenants who need permanent supportive housing.
- Measuring outcomes regarding workforce equity should include all workers, not solely apprentices.
- Many minority owned businesses need additional support to successfully participate in the COBID certification program.
- Consider sustainability/durability and life cycle costs, and incorporate findings from the 2015 Meyer Memorial Trust study on cost efficiencies in affordable housing in evaluating project costs.

Materials following this page were distributed at the meeting.

PLAND CITY CENTER




Regional Transit - 2040
MULTNOMAH ROUTE
HOLLADAY ROUTE
HOLLYWOOD
WEST
EAST
1-mile
1.5 miles
3/4 mile
The Better 4 station MAX Subway
In the first phase, its East Portal is near NE 6th Ave and its West Portal beneath the Morrison/Belmont bridgehead. Its second phase South Portal on Naito Pkwy is south of Market Street. Its third phase Goose Hollow Portal is near SW 16th Ave on Jefferson Street. A Convention Center/Rose Quarter Station is below I-5, much better than Tri-Met's location beneath the Yellow Line station. From its platform, escalators, elevators and stairs lead to a Mezzanine with corridors to Yellow Line and arena venues. Convention Center and Hotel with direct elevators and stairs. Saturday Market and Salmon Springs Stations are 2-levels – upper level south and west, lower level north and east. This reduces construction disruption and allows elevators and stairs on both sides of Naito Pkwy for Saturday Market and possibly Salmon Springs Station.
The 4th Station, also 2 level, is located between 5th/6th Aves at the Unitas Credit Union Plaza for better transfers to MAX and Streetcar lines.
Streetcar Expansion
This plan supports the proposed Streetcar Line via NW 18th/19th Aves to Montgomery Park. These streetcars would cross the Broadway Bridge, then turn south to the OMSI station turnback, doubling streetcar service with more frequent intervals such as on SW 10th / 11th Aves from NW Lovejoy to South Waterfront.
HAYDEN ISLAND
PDX
PDX City
2.75 Mile Subway
28.5 Miles Total
Regional MAX
1 mile
MHCC
BARBUR BLVD BRT
15 miles
5 miles
3 miles
Tigard
Tualatin
Wilsonville
Milwaukie
Oregon City
Clackamas TC
OMSI
Union Station
Pioneer Square
Lovejoy
Overlook Pk.
Albina RIB
Hollywood TC
Parkrose/Sumner TC
Division/SE 12
SE 17 & Rhine
SE 17 & Holgate
SE Harold
SE Bybee Bl.
SE Tacoma/ Johnson Creek
City Hall
Park Av
Oak Grove
Concord
Vinyard
Jennings
Gladstone
SE Main
SE Division
SE Powell
SE Holgate
Lents Town Center/ SE Foster
SE Flavel
SE Fuller
Freeman
37th
82nd

Metro

600 NE Grand Ave.
Portland, OR 97232-2736
oregonmetro.gov

Metro

Minutes

Thursday, July 25, 2019

2:00 PM

Metro Regional Center, Council chamber

Council meeting

1. Call to Order and Roll Call

Council President Peterson called the Metro Council meeting to order at 2:02 p.m.

Present: 7 - Councilor Sam Chase, Councilor Shirley Craddick, Councilor Craig Dirksen, Councilor Bob Stacey, Council President Lynn Peterson, Councilor Christine Lewis, and Councilor Juan Carlos Gonzalez

2. Safety Briefing

Council President Peterson called on Councilor Dirksen to provide a safety briefing. Councilor Dirksen provided a safety briefing for the meeting including information on the location of emergency exits, fire extinguishers and automated external defibrillators.

3. Public Communication

Katie Larsell, City of Portland: Ms. Larsell, of the East Portland Action Plan (EPAP), shared her personal experience living in and advocating for her community East Portland. She discussed the destabilizing impacts of residential infill on low income communities in East Portland. Ms. Larsell highlighted the East Portland equitable infill grant request and stated her objection to the grant request not being funded as part of the current 2040 Planning and Development grant cycle.

John Mulvey, City of Portland: Mr. Mulvey, housing committee co-chair of the EPAP, shared some of the rapid changes taking place in East Portland including rising housing costs, increased disparity in economic resilience and the availability of fewer social services. He highlighted anticipated impacts of the residential infill project and stated his disappointment that Metro was not funding the East Portland equitable infill grant proposal. (Mr. Mulvey

submitted written documents as part of his testimony; see the July 25 meeting materials.)

Peg Malloy, City of Portland: Ms. Malloy, of the Portland Housing Center, discussed the East Portland equitable infill grant proposal, explaining that it would generate wealth creation for low income home owners in outer Southeast Portland. She highlighted the opportunities that accessory dwelling units could provide to homeowners and encouraged Metro to consider the infill grant proposal.

Robert Liberty, City of Portland: Mr. Liberty, of Portland State University, explained his work on an accessory dwelling unit strategy to increase housing supply and achieve equity goals through wealth creation and affordability. He stated the importance of anti-displacement measures and discussed opportunities to experiment and innovate at the neighborhood level. (Mr. Liberty submitted written documents as part of his testimony; see the July 25 meeting materials.)

Art Lewellan, City of Portland: Mr. Lewellan expressed his concern for the Southwest Corridor light rail project and advocated for a bus rapid transit system as an alternative transit proposal for Barbur Boulevard. He discussed the space saving benefits of bus rapid transit and urged Metro to authorize an independent study of bus rapid transit for the Southwest Corridor. (Mr. Lewellan submitted written documents as part of his testimony; see the July 25 meeting materials.)

4. Consent Agenda

A motion was made by Councilor Lewis, seconded by Councilor Stacey, that this item be adopted. The motion passed by the following vote:

Aye: 7 - Councilor Chase, Councilor Craddick, Councilor Dirksen, Councilor Stacey, Council President Peterson, Councilor Lewis, and Councilor Gonzalez

4.1 Resolution No. 19-5004, For the Purpose of Confirming the Reappointment of Dañel Malán to the Metropolitan Exposition Recreation Commission

4.2 Consideration of the Council Meeting Minutes for July 11, 2019

5. Resolutions

5.1 Resolution No. 19-5002, For the Purpose of Approving Fiscal Year 2019-20 Funding for 2040 Planning and Development Grants Funded with Construction Excise Tax

Council President Peterson called on Ms. Elissa Gertler, Metro Planning and Development Director, Ms. Lisa Miles, Metro Principal Project Manager, and Mr. Damien Hall, Chair of the 2040 Planning and Development Grant Screening Committee, to provide a brief presentation on the resolution.

Ms. Miles introduced the resolution, noting that this was the seventh cycle of 2040 Planning and Development grant awards. She stated that the grants were funded through the construction excise tax and explained that the screening committee's recommended projects were those that most clearly aligned with the program's central mission. Ms. Miles reviewed the grant program mission, noting that successful proposals in the equitable development category must demonstrate a primary emphasis on advancing equity. She shared that the program received ten applications from five local governments and one private organization and noted that this was the first year private organizations were eligible to apply with the endorsement of a local government partner. Ms. Miles stated the screening committee was recommending seven projects for a funding total of $2.428 million.

Mr. Hall provided a high level overview of the committee's recommendation in each of the following three categories: equitable development, development within the urban growth boundary and new urban areas. Mr. Hall shared highlights from the projects including the depth of equitable development proposals from Albina Vision Trust and Propser Portland, the recommendation to Clackamas County to narrow their proposal to one corridor and the project funding for master planning to newly expanded urban areas. He reviewed additional recommendations from the screening committee for future grant cycles to include specific evaluation criteria for each funding category, cultivation of applications from community entities and Metro's Committee on Racial Equity (CORE) consideration of future program changes.

Ms. Gertler thanked the committee for their hard work and discussed next steps for incorporating the committee's additional recommendations into the grant program.

Council Discussion:

Councilor Lewis asked about the committee's process in evaluating applications. Mr. Hall discussed the committee's process for reviewing and discussing applications. Councilor Lewis asked Ms. Gertler whether it would be appropriate to ask the screening committee to review proposed policy changes after consideration by CORE. Councilor Craddick discussed the maturity of the 2040 Planning and Development grant program, noting this was a good opportunity to review the achievements of the funded projects in creating change for the impacted communities.

Councilor Chase thanked Mr. Hall for his service on the committee and discussed program connections to the

Housing Oversight Committee. He emphasized the importance of residential infill and anti-displacement, stating he looked forward to future proposals that addressed these issues. Council President Peterson discussed the need to develop tools that address displacement and wealth generation as a region.

A motion was made by Councilor Dirksen, and seconded by Councilor Gonzalez, to approve Resolution No. 19-5002.

A motion was made by Councilor Stacey, and seconded by Councilor Lewis, to substitute Resolution No. 19-5002A for the resolution.

Councilor Stacey thanked staff and the committee for its work. He emphasized the importance of achieving the $1 million goal for equitable development funding and expressed a need to address displacement in East Portland. Councilor Stacey stated his support for providing staff resources to assist and advise applicants seeking to address displacement in future grant cycles. He outlined the substance of the revisions in Resolution No. 19-5002A.

Councilor Dirksen proposed a small modification to the language of the resolution in the fourteenth whereas statement to read “the urgent need for tools to create equity and prevent and mitigate involuntary displacement.” The motion to substitute Resolution No. 19-5002A as amended passed.

Councilor Lewis discussed the connection between the work required for residential infill and Metro’s programs. She stated her support for the resolution and highlighted Clackamas County’s corridor project and the new urban areas planning projects. Councilor Dirksen responded to the

public testimony on the East Portland equitable infill project, explaining that Council was supportive of the concepts in the proposal. Councilor Gonzalez highlighted the opportunities for transformation through the funding recommendations and noted the importance of investments in Albina Vision and key regional centers in Washington County. He noted that coordination with jurisdictions implementing House Bill 2001 was needed to ensure equity remained a core value. Council President Peterson discussed the importance of community led development and stated her support for the funding recommendations.

A motion was made by Councilor Stacey, seconded by Councilor Dirksen, that this item be adopted. The motion passed by the following vote:

Aye: 7 - Councilor Chase, Councilor Craddick, Councilor Dirksen, Councilor Stacey, Council President Peterson, Councilor Lewis, and Councilor Gonzalez

6. Chief Operating Officer Communication

Mr. Andrew Scott provided an update on the following events or items: the opportunity to serve on Metro's Regional Waste Advisory Committee.

7. Councilor Communication

Councilors provided updates on the following meetings and events: the Oregon Zoo hosted elected officials coffee and tour, the Low-income Fare Task Force first annual celebration and the Housing Oversight Committee meeting.

Councilor Gonzalez shared his involvement in media engagements on the MAX tunnel study. Council President Peterson shared that Mr. Andre Bealer would be joining the Council office staff as the President's policy advisor.

8. Adjourn

There being no further business, Council President Peterson adjourned the Metro Council meeting at 3:22 p.m. The Metro Council will convene the next regular council meeting on August 1, 2019 at 2:00 p.m. at the Metro Regional Center in the council chamber.

Respectfully submitted,

Sara Farrokhzadian, Legislative and Engagement Coordinator

ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF JULY 25, 2019

ITEM	DOCUMENT TYPE	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT NO.
3.0	Handout	7/25/19	Written Testimony submitted by John Mulvey	072519c-01
3.0	Handout	7/25/19	East Portland Equitable Infill Proposal: Challenge, Implementer Roles & Outcomes submitted by Robert Liberty	072519c-02
3.0	Handout	7/25/19	Demographic and Income Profile for East Portland submitted by Robert Liberty	072519c-03
3.0	Handout	7/25/19	City of Portland Bureau of Planning and Sustainability Gentrification and Displacement Assessment submitted by Robert Liberty	072519c-04
3.0	Handout	7/25/19	Notes on Naito Parkway MAX Subway Plan and Barbur Boulevard Light Rail Concerns submitted by Art Lewellan	072519c-05
3.0	Handout	7/25/19	Portland Light Rail Map with Proposed Changes submitted by Art Lewellan	072519c-06
5.1	Powerpoint	7/25/19	2040 Planning and Development Grants	072519c-07

Affordable Housing Bond

Local Implementation Strategies for the City of Beaverton and Washington County

August 1, 2019

Metro

Beaverton's Strategy

- $31M to fund 218 affordable homes
- Engagement reached over 200 people; 69% of those who provided demographics were people of color
- 4 projects, including Mary Ann and Metro-owned Elmonica site
- 20% COBID/MWESBDV goal and workforce monitoring commitments

Recommendation and considerations

Oversight Committee recommendation for approval with considerations:

- Further define strategies and outcomes to demonstrate the advancement of racial equity.
- Incorporate findings from the 2015 Meyer Memorial Trust study on cost efficiencies in affordable housing.

Washington County's Strategy

- $116M to fund 814 homes
- Engagement reached over 300 people
- Goal to provide 100 PSH units
- $25M set-aside for Small Non-Profits and Community Housing Development Organizations (CHDO)
- 15% COBID/MWESB threshold goal; 20% aspirational goal; C2P2 participation

Recommendation and considerations

Oversight Committee recommendation for approval subject to screening criteria revision and considerations:

- Further define strategies and outcomes to demonstrate the advancement of racial equity.
- Clarify intentions for geographic distribution.
- Demonstrate progress toward reaching the 20% MWESB goal.

oregonmetro.gov