Council meeting agenda



Thursday, October 21, 2021	10:30 AM	https://zoom.us/j/615079992 or
		888-475-4499 (toll free)

Revised 10/19 This Council Meeting will adjourn to a Work Session.

Please note: To limit the spread of COVID-19, Metro Regional Center is now closed to the public. This meeting will be held electronically.

You can join the meeting on your computer or other device by using this link: https://zoom.us/j/615079992 or 888-475-4499 (toll free).

If you wish to attend the meeting, but do not have the ability to attend by phone or computer, please contact the Legislative Coordinator at least 24 hours before the noticed meeting time by phone at 503-797-1916 or email at legislativecoordinator@oregonmetro.gov.

1. Call to Order and Roll Call

2. Public Communication

Public comment may be submitted in writing and will also be heard by electronic communication (video conference or telephone). Written comments should be submitted electronically by emailing legislativecoordinator@oregonmetro.gov. Written comments received by 4:00p.m on the day before the meeting will be provided to the council prior to the meeting.

Those wishing to testify orally are encouraged to sign up in advance by either: (a) contacting the legislative coordinator by phone at 503-797-1916 and providing your name and the agenda item on which you wish to testify; or (b) registering by email by sending your name and the agenda item on which you wish to testify to legislativecoordinator@oregonmetro.gov. Those requesting to comment during the meeting can do so by using the "Raise Hand" feature in Zoom or emailing the legislative coordinator at legislativecoordinator@oregonmetro.gov. Individuals will have three minutes to testify unless otherwise stated at the meeting.

3. Presentations

3.1	Emergency Ma	nagement Follow-up Audit Presentation	<u>21-5604</u>
	Presenter(s):	Brian Evans (he/him), Metro	
		Angela Owens (she, her), Metro	
	Attachments:	Attachment 1	
		Attachment 2	

Cour	icil meet	ing	Agenda	October 21, 2021
4.	Conse	nt Agenda		
	4.1	Consideration of September 23, Attachments:	<u>21-5612</u>	
5.	Resolu	utions		
	5.1		21-5210, For the Purpose of Declaring a Office of Metro Councilor for Council	<u>RES 21-5210</u>
		Presenter(s):	Kristin Dennis (she/her), Metro Ina Zucker (she/her), Metro	
		Attachments:	Resolution No. 21-5210	
6.	Ordina	ances (Second Rea	ading)	
	6.1		21-1469, For the Purpose of Establishing tro Council District Reapportionment and nergency	<u>ORD 21-1469</u>
		Presenter(s):	Anne Buzzini (she/her), Metro	
		Attachments:	<u>Ordinance No. 21-1469</u> <u>Staff Report</u>	
7.	Adjou	rn to a Work Sess	ion	
		Work Session		
1.	Call to	Order and Roll C	all	
2.	Work	Session Topics:		
	2.1	Supportive Hou	ising Services Resolution Report	<u>21-5595</u>
		Presenter(s):	Patricia Rojas (she/her), Metro Nui Bezaire (she/her), Metro	
		Attachments:	Staff Report SHS Council Resolution Shelter Memo Attachment 1 Attachment 2 Attachment 3 Attachment 4 Attachment 5	

Council mee	eting	Agenda	October 21, 2021
2.2	Federal, State a	and Tribal Affairs Legislative Agenda	<u>21-5599</u>
	Presenter(s):	Anneliese Koehler (she/her), Metro,	
		Tyler Frisbee (she/her), Metro	
		Katie McDonald (she/her), Metro	
	Attachments:	Staff Report	
		Attachment 1	
		Attachment 2	
		Attachment 3	
		Attachment 4	
3. Chie	f Operating Officer	Communication	

- 4. Councilor Communication
- 5. Adjourn

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1700(工作日上午8點至下午5點),以便我們滿足您的要求。

Ogeysiiska takooris la'aanta ee Metro

Metro waxay ixtiraamtaa xuquuqda madaniga. Si aad u heshid macluumaad ku saabsan barnaamijka xuquuqda madaniga ee Metro, ama aad u heshid warqadda ka cabashada takoorista, booqo www.oregonmetro.gov/civilrights. Haddii aad u baahan tahay turjubaan si aad uga qaybqaadatid kullan dadweyne, wac 503-797-1700 (8 gallinka hore illaa 5 gallinka dambe maalmaha shaqada) shan maalmo shaqo ka hor kullanka si loo tixgaliyo codsashadaada.

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សេចក្តីជូនដំណីងអំពីការមិនរើសអើងរបស់ Metro

ការកោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលពាក្យបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។ បើលោកអ្នកគ្រូវការអ្នកបកប្រែកាសនៅពេលអង្គ ប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រពំរឺរថ្ងៃ ថ្ងៃធ្វើការ) ប្រពំរឺរថ្ងៃ ថ្ងៃធ្វើការ) ប្រពំរឺរថ្ងៃ إشعار بعدم التمييز من Metro

تحترم Metro الحقوق المننية. للمزيد من المعلومات حول برنامج Metro للحقوق المننية أو لإيداع شكرى ضد التمييز، يُرجى زيارة الموقع الإلكتروني <u>www.oregonmetro.gov/civilrights.</u> إن كنت بحاجة إلى مساعدة في اللغة، يجب عليك الاتصال مقدماً برقم الهاتف 1700-797-503 (من الساعة 8 صباحاً حتى الساعة 5 مساءاً، أيام الاثنين إلى الجمعة) قبل خمسة (5) أيام عمل من موعد الاجتماع.

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February 2017

Television schedule for Metro Council meetings

Clackamas, Multnomah and Washington	Portland
counties, and Vancouver, WA	Channel 30 – Portland Community Media
Channel 30 – Community Access Network	Web site: <u>www.pcmtv.org</u>
Web site: www.tvctv.org	Ph: 503-288-1515
Ph: 503-629-8534	Call or visit web site for program times.
Call or visit web site for program times.	
Gresham	Washington County and West Linn
Channel 30 - MCTV	Channel 30– TVC TV
Web site: www.metroeast.org	Web site: <u>www.tvctv.org</u>
Ph: 503-491-7636	Ph: 503-629-8534
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Oregon City and Gladstone	
Channel 28 – Willamette Falls Television	
Web site: http://www.wftvmedia.org/	
Ph: 503-650-0275	
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PLEASE NOTE: Show times are tentative and in some cases the entire meeting may not be shown due to length. Call or check your community access station web site to confirm program times. Agenda items may not be considered in the exact order. For questions about the agenda, call the Metro Council Office at 503-797-1540. Public hearings are held on all ordinances second read. Documents for the record must be submitted to the Regional Engagement and Legislative Coordinator to be included in the meeting record. Documents can be submitted by e-mail, fax or mail or in person to the Regional Engagement and Legislative Coordinator. For additional information about testifying before the Metro Council please go to the Metro web site www.oregonmetro.gov and click on public comment opportunities.

Agenda Item No. 3.1

Emergency Management Follow-up Audit Presentation

Presentations

Metro Council Meeting Thursday, October 21, 2021

Emergency Management Follow-Up Audit

Why this audit is important

In 2018, the audit Emergency Management: Strengthen basic elements to prepare for disasters found that Metro had not developed a program or formal structure to respond to emergencies for the agency as a whole. This meant that Metro relied mostly on employee initiative and experience to manage emergencies. As a result, Metro was more vulnerable to disasters.

The audit made seven recommendations for Metro to clarify and strengthen roles, responsibility, and authority. This mattered because unclear roles can lead to confusion and make it difficult to assign appropriate resources.

This follow-up audit was designed to connect previous recommendations to real-world emergency response and recovery efforts. The intent was to help Metro prioritize additional efforts to implement the original audit recommendations while responding to a global pandemic.

Safety sign at Oregon Zoo



Source: Oregon Zoo

What we found

Metro made progress implementing most recommendations from the 2018 audit. Six recommendations were in process and one was not implemented. This was reasonable given the amount of time since the original audit.

Status of Recommendations

2018 Audit Recommendations	Status					
To strengthen its regional role during a disaster, Metro should:						
1. Complete appendices outlined in the Disaster Debris Manag						
Plan						
2. Specify what, if any, additional roles Metro intends to fulfill	during a In process					
disaster						
To prepare for severe emergencies and disasters, Metro sho	ould:					
3. Clarify roles, responsibilities, and authority by	In Process					
 a) determining which elements of NIMS, including ICS, it will us formally adopt them 	se and (Implemented)					
b) formally approving an agency-wide emergency operations plan	n (In process)					
c) assigning responsibility to specific position(s) for maintaining emergency operation plan and procedures	the (Implemented)					
d) providing training and exercises for the employees who will be involved in response and recovery operations	e (In process)					
4. Formalize emergency procedures by developing written ager	ncy-wide In process					
procedures, at a minimum, for						
a) tracking and reporting emergency-related damage and costs	(In process)					
b) manual payroll and vendor payment processes for when norm systems are unavailable	nal (In process)					
5. Maintain an up-to-date inventory of emergency management	t Not					
resources	implemented					
6. Plan for continuity of operations by	In process					
 a) finishing current continuity planning efforts for solid waste ar supporting functions 						
b) planning for other essential and remaining agency functions	(In process)					
7. Improve emergency communication by	In process					
a) developing a back-up emergency communications system	(In process)					
b) implementing a notification system(s) that reaches all Metro e	mployees (In process)					

Although previous recommendations were not fully implemented, Metro did put into place best practices to respond to a series of emergencies over the past year. However, Metro's regional role remained unclear. Finalizing the emergency management plan, developing continuity plans, and then structuring training and exercises on those plans was needed to provide additional clarity. Finally, lack of continuity planning and limitations in agency-wide processes reduced Metro's ability to proactively manage non-health and safety risks as emergency response transitioned to recovery.

Based on our review of Metro's response to Covid-19 and the 2020 wildfires, prioritizing recommendations related to roles and responsibilities would better prepare Metro for responding to emergencies. Prioritizing recommendations for continuity planning would better prepare Metro to manage risks other than those related to health and safety as it recovers from emergencies.



Emergency Management Follow-Up

Angela Owens Principal Management Auditor Elliot Shuford Senior Management Auditor

October 2021

BACKGROUND

Emergency management is an approach used to deal with emergencies and disasters. Oregon law requires counties to have dedicated emergency managers and programs. Other jurisdictions such as Metro are allowed to develop programs according to their needs.

Emergencies are managed in phases. Models vary, but typically include preparedness, mitigation, response, and recovery. Preparedness includes planning, training, and exercising plans to strengthen an organization's capabilities. Mitigation includes actions taken to reduce impacts when disasters happen, such as retrofitting buildings to better withstand earthquakes. Response is focused on safety and includes actions to save lives and prevent further damage. Finally, recovery includes actions taken to return to normal or safer operations.

The 2018 audit of emergency management focused mostly on the preparedness phase and found that Metro had not developed a program or formal structure to respond to emergencies for the agency as a whole. Instead, Metro took an ad hoc approach to manage four emergencies we reviewed. This meant that Metro relied mostly on employee initiative and experience. As a result, Metro was more vulnerable to larger emergencies affecting the entire agency. We made seven recommendations for Metro to clarify and strengthen roles, responsibilities, and authority.

We designed this follow-up audit to connect previous audit recommendations to the real-world emergency response and recovery efforts caused by Covid-19 and the wildfires of September 2020. This approach allowed us to help Metro prioritize additional efforts needed to implement the 2018 audit recommendations and identify lessons learned while responding to a global pandemic. In particular, we focused on the use of Metro's facilities during emergencies. We also looked at the effect of changes to business processes resulting from the need to respond to the health and safety risks associated with Covid-19. The intent was to evaluate whether additional changes were needed as the agency moved closer to the recovery phase of emergency management.

Covid-19 restrictions required closure of Metro's venues for normal business and widespread layoffs for those lines of business. Other departments changed operations and employees were required to work from home when possible. Widespread fires also affected the region. Metro operations were affected directly by smoke and Metro's venues were used as an emergency fire shelter and a staging area for relief supplies.

SUMMARY -

Metro made progress on implementing most of the recommendations from the 2018 audit **Emergency Management: Strengthen basic elements to prepare for disasters.** Of the seven recommendations, six were in process and one was not implemented. Continued implementation of the recommendations will be important for Metro to clarify expectations and manage risk during and after emergencies.

Based on our review of Metro's response to Covid-19 and the 2020 wildfires, prioritizing recommendations related to roles and responsibilities would better prepare Metro for responding to emergencies. Prioritizing recommendations for continuity planning would better prepare Metro to manage risks other than those related to health and safety as it recovers from emergencies.

BRIAN EVANS

Metro Auditor

600 NE Grand Avenue Portland, OR 97232 503-797-1892 www.oregonmetro.gov/auditor

RESULTS

Although Metro made progress on most of the recommendations from the 2018 audit, more work was needed to clarify roles and manage risk. Specifically, Metro's regional role remained unclear, and more work was needed to clarify roles internally. Unclear roles can lead to confusion and make it difficult to assign appropriate resources for emergency preparedness.

Metro put several processes in place to minimize health and safety risk during Covid-19. This was in line with best practices. However, it increased the chance for other risks, such as financial, reputational, or reporting risks, to be accepted during emergency response. Lack of department-level continuity planning and limitations in agency-wide processes reduced Metro's ability to proactively manage non-health and safety risks as emergency response transitioned to recovery. This matters because emergencies can weaken controls and exacerbate existing control weaknesses.

While we observed that Metro's response was based on best practices, each emergency is different. Prioritizing recommendations related to roles and continuity planning will better prepare Metro for responding to and recovering from future emergencies. In particular, finalizing the emergency operations plan and developing continuity plans would provide more clarity about emergency roles and authority. Structured training and exercises on these plans can provide assurance that the agency is as prepared as possible for the next emergency.

Metro made progress on most recommendations from the 2018 audit Nearly all of the seven recommendations from the 2018 audit were in process. This was reasonable given the amount of time since the original audit. Metro's first emergency manager was hired only three months before the onset of Covid-19. Additionally, progress on several of the recommendations indicated Metro was on track for full implementation.

For instance, the original audit found there was confusion about what regional roles Metro would play during emergencies. Metro developed a plan for managing disaster debris for the region, but it was incomplete. Our follow -up work found that Metro started, and had plans to finish, the appendices for the disaster debris management plan and to specify any additional roles.

The 2018 audit found that Metro took an ad hoc approach to manage emergencies. Our follow-up work found that Metro implemented the National Incident Management System (NIMS), which includes the Incident Command System (ICS). These systems create a standardized structure to manage emergencies and help with coordination and decision-making. Metro drafted an emergency operations plan (emergency plan) and developed some administrative procedures. Metro also provided some training for emergency management and had plans to conduct more in the future.

Metro had not developed an inventory for emergency resources. This meant finding some resources during an emergency, such as chainsaws, could be

delayed. People we spoke to expressed concern about how difficult and costly it is to maintain such an inventory.

We noted progress in developing a continuity of operations plan (continuity plan) for the agency. The 2018 audit found that no such plan was in place and Metro was at risk of having to make critical resource decisions during a time of stress. Since that time, Metro finished a continuity plan for solid waste, but had not yet developed an agency-wide continuity plan. During Covid-19, departments made progress by identifying essential functions and employees. However, we noted the scope of what was considered an essential function was inconsistent and functions were not prioritized across the agency.

Communication is critical in an emergency. The 2018 audit found gaps in agency-wide communication technology. During our current work, we found that Metro recently instituted an emergency telephone number that employees can call to find information about things such as facility closures. Metro did not have a notification system to reach all employees or a back-up communication system. This leaves it more vulnerable in the case of a major disaster with more physical impacts, such as an earthquake.

Since the prior audit, Metro moved the emergency management function to a new department with agency-wide responsibility and hired an emergency manager. This position was tasked with preparing Metro for emergencies. That position was filled only a few months before Covid-19 interrupted Metro operations. Once that happened, the position's focus was largely on emergency response.

Exhibit 1 Status of Recommendations

2018	Status	
To st		
1.	Metro should complete appendices outlined in the Disaster Debris Management Plan	In process
2.	Metro should specify what, if any additional roles Metro intends to fulfil during a disaster	In process
To pr		
3.	In process	
	a) determining which elements of NIMS, including ICS, it will use and formally adopt them	(Implemented)
	b) formally approving an agency-wide emergency operations plan	(In process)
	c) assigning responsibility to specific position(s) for maintaining the emergency operations plan and procedures	(Implemented)
	d) providing training and exercises for the employees who will be involved in response and recovery operations	(In process)
4.	Metro should formalize emergency procedures by developing written agency-wide procedures, at a minimum, for:	In process
	a) tracking and reporting emergency-related damage and costs	(In process)
	b) manual payroll and vendor payment processes for when normal systems are unavailable	(In process)
5.	Metro should maintain an up-to-date inventory of emergency resources	Not implemented
6.	Metro should plan for continuity of operations by:	In process
	a) finishing current continuity planning efforts for solid waste and supporting functions	(Implemented)
	b) planning for other essential and remaining agency functions	(In process)
7.	Metro should improve emergency communication by:	In process
	a) developing a back up emergency communications systemb) implementing a notification system(s) that reaches allMetro employees	(In process) (In process)

Source: Auditor's Office analysis of emergency management documents and interviews

Metro's response to recent emergencies was based on best practices

Despite previous audit recommendations not being fully implemented, Metro put into place best practices to respond to a series of emergencies over the past year. For example, Metro used ICS to manage wildfires and Covid-19. ICS is a tool to help coordinate during an emergency. Interviews suggested there was strong coordination in these efforts. Metro addressed community needs by making its facilities available for things such as vaccine clinics and shelters.

Exhibit 2 Metro's response to Covid-19 included hosting a vaccine clinic in the Oregon Convention Center



Source: Oregon Metro website

Additionally, Metro put into place formal agency-wide processes for emergency response and recovery. These could be replicated in the future. These processes prioritized health and safety during Covid-19 and included a risk assessment process, the identification of essential employees, and a policy development and review process. The risk assessment process encouraged discussion about various risks and mitigation, such as the need for additional signage to reduce health and safety risks.

Exhibit 3 Sign at the Oregon Zoo encouraged guests to think about safety



Source: Oregon Zoo

Although these practices were in place, several people we spoke with noted that much of Metro's success was because the right people were in place at the right time. This is similar to what we found in the 2018 audit and suggests Metro may still be overly reliant on employee experience and initiative to manage emergencies. Relying too much on a few employees can create challenges for Metro if they become injured or are otherwise unavailable during an emergency. It can also create employee burnout.

Formalize and exercise plans to establish roles and authority, clarify expectations and reduce confusion We found that clarifying expectations about some emergency management roles and processes would better prepare Metro for future emergencies. When expectations for the roles people and organizations play in an emergency are not clear, there is the potential for confusion, delays, and increased stress. For instance, some people reported confusion about the process for approving information Metro made available to the public. In other cases, people reported that authority for making decisions was not clear to them.

Finalizing the emergency plan, developing an agency-wide continuity plan, and then structuring training and exercises on those plans would provide more clarity for emergency roles and authority. Because each emergency is different, effective emergency management requires both planning and flexibility. Further development of plans and training will allow Metro to manage these tradeoffs.

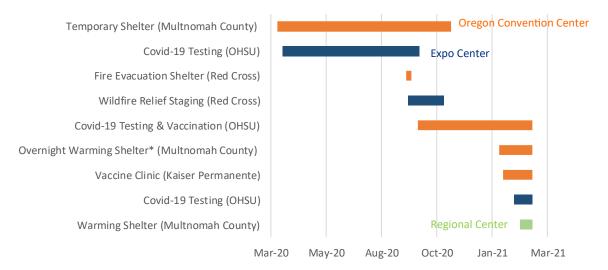
Metro's regional roles beyond disaster debris management remain unclear. The 2018 audit found there was not a shared understanding about what Metro's role in the region would be following a disaster. Some believed solid waste and disaster debris were the only things Metro would be responsible for. Some thought Metro would provide its facilities for uses such as mass sheltering or lend out employees to other jurisdictions.

An early draft of the emergency plan outlined three roles for Metro: safety for staff and the public, protecting assets and animals, and debris management. However, the latest version omitted this specific description of regional roles. Metro leadership said regional roles had not been settled.

Expectations for how Metro will manage disaster debris continued to be a question as well. Metro had completed the Disaster Debris Management Plan. However, much of the detail about how those operations will be carried out, like procedures for managing a debris-generating emergency, had not been finalized. That information was contained in the appendices. Some of this may be clarified as Metro develops intergovernmental agreements with neighboring jurisdictions. We were told this work had been assigned and was being scoped. However, reaching agreements with multiple parties may be a challenge given the complexities of debris management and the federal process to reimburse local costs for disasters.

Metro facilities were also available for partners to carry out regional roles in ways that were unexpected. The Oregon Convention Center (OCC) and Expo Center were used for the state's largest vaccination clinic, testing centers, and shelters. Expo was used to stage first aid relief supplies for the wildfires and the parking garage at the Regional Center was briefly used as an outdoor shelter during cold weather.

Exhibit 4 Metro facilities were used by partners to meet a variety of regional needs[^]



Source: Auditor's Office analysis of facility license agreements and facility documentation

^ As of February 2021

*Agreement was amended so space could be used as a vaccine clinic in the absence of extreme weather

While most venue employees we spoke with thought roles and authority were clear, we noted there was a lack of clarity about some roles and internal processes in a few cases. For instance, there was confusion about the process to approve information before posting it online, despite Metro having named a Public Information Officer (PIO) within its ICS framework. The PIO is assigned during the emergency and responsible for developing and releasing related information. This may look different than communication processes during normal operations. Clarifying the Communications department responsibilities in the emergency plan and outlining a procedure for the PIO to approve information would likely help alleviate this confusion in the future.

Some staff also reported that authority for making certain decisions about venues was not clear. The emergency plan stated that a written delegation of authority will be made from the Chief Operating Officer (COO) to the Emergency Manager. In this situation, the delegation was made verbally. Using written delegations in the future may help clarify what authority the Emergency Manager has or does not have.

Also, while the emergency plan outlined a process for Metro to request assistance, it did not outline who is responsible for making final decisions about requests coming in from other jurisdictions or partners. Covid-19 was a unique emergency because the venues were needed and they were not being used for normal operations. In the future, however, there may be a tension between the business needs of the venues and regional needs for things such as shelter. While decisions about resources in an emergency are likely to be made on a case-by-case basis, describing who makes the final decision or how it should be made could save time.

Metro developed agreements with different organizations for the emergency uses of the venues and the Regional Center. Generally, these agreements helped minimize risk for Metro. For instance, employee health and safety was ensured because the agreements specified the limited circumstances where Metro employees would interact with the public being sheltered or vaccinated. Metro was also able to recoup about \$2.7 million in direct costs for the use of the venues.

While agreements were developed for almost all of the emergency facility uses, one was not signed for the Red Cross' use of the OCC as a fire shelter. This may have been due to the fact that Metro received very little notice prior to that use. However, during the 2018 audit, Metro had a Memorandum of Understanding and other documentation about how the OCC would be used by the Red Cross as an emergency shelter. Revisiting how Metro intends to work with the Red Cross and other partners may help parties be better prepared if or when the need for a future shelter arises.

Covid-19 was also a unique emergency in other ways that presented challenges for Metro's preparedness. Covid-19 was primarily a long-term interruption to normal business. The emergency plan does not address how continuity will be maintained, but expects that Metro will continue to conduct its business. Metro had not developed a continuity plan. Departments developed 'mini' continuity plans outlining essential functions and employees, but it was not clear how departments should balance normal operations with emergency responsibilities.

Training and exercises would help implement the emergency and continuity plans. Some on-the-job training was reported to be conducted, but more was planned. Training during non-emergencies helps familiarize people with their roles. Conducting exercises also helps identify assumptions about roles and authority, and provides an opportunity to practice making difficult decisions without the pressure of a real emergency. Training and exercises can also help identify where more or fewer resources are needed. After-action reports are another way to help Metro learn from exercises and emergencies and identify areas for improvement.

Address process limitations to manage risk as emergencies move between phases

Processes put into place during Covid-19 prioritized health and safety risks, but were limited in managing other risks. Specifically, we noted opportunities for improvement in Metro's Covid-19 risk assessment process, the identification of essential employees, and the policy development and revision processes. These limitations reduced Metro's ability to manage emergencies as they moved between phases.

We reviewed three activities at a high level to evaluate potential effects of these limitations. Some of them were addressed through employee initiative and experience. However, we did see examples of confusion, reporting delays, and personnel time lost. Managing emergencies requires changes that are intended to prioritize health and safety and the continuity of essential operations. This reduces capacity to focus on other types of risk during the emergency, such as financial, reputational, or reporting risks. At the same time, these risks could increase because of the emergency. This is because reduced staffing and process changes can weaken the activities in place to manage risk (controls) and exacerbate existing control weaknesses. For instance, segregation of duties is a key control to reduce fraud and abuse by making sure no single person has the ability to carry out a process from beginning to end. Emergencies may result in reduced staffing, which can create challenges in ensuring proper segregation of duties.

Best practices emphasize the importance of reassessing risks after changes are made to ensure controls are operating effectively. In continuity planning, this can be done ahead of time through business process and impact analyses. Building reevaluation points into existing processes could be one way to address these limitations. Department-level continuity planning is another way.

Process	Strengths	Limitations
Risk Assessment Process	 Prioritized health and safety Formal, repeatable process Encouraged coordination among various subject- matter experts 	 Did not apply to all operational changes Prompts in the risk mitigation and assessment forms could be inconsistently interpreted
Identification of Essential Employees	 Identified employees that were needed to continue operations during Covid-19 Prioritized health and safety Formal, repeatable process 	• Encouraged, but did not require, consideration of risks and potential mitigation in the assignment of essential functions
Policy Development and Review Process	 Prioritized health and safety Formal, repeatable process Encouraged coordination among various subject- matter experts 	• Gaps could reduce attention to risks not related to health and safety

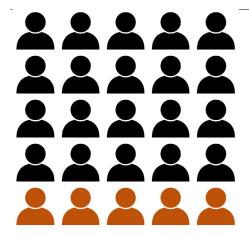
Exhibit 5 There were several strengths and some limitations in the processes Metro developed to respond to Covid-19

Source: Auditor's Office analysis of Metro processes and best practices in emergency management, risk management, and internal controls.

We identified two limitations in the risk assessment process. First, it was limited to activities that continued or increased person-to-person contact. As a result, some operational changes were not subject to this process and therefore less likely to receive the same level of scrutiny.

For example, Financial and Regulatory Services (FRS) modified purchasing card (P-Card) procedures to respond to Covid-19. Although modifications were minor, in some instances they led to confusion and missing monthly reports. Specifically, about 20% of Metro P-card holders had challenges in complying with P-Card reporting requirements between July 2020 and February 2021. P-Card users were required to electronically submit purchase receipts. The value of missing reports was about \$136,000, which was 10% of purchases made during that time. This was comparatively low because P-Card spending dropped during Covid-19. A risk assessment process similar to the one Metro developed for Covid-19 may have encouraged a reevaluation after the change took place to ensure it was having the desired effect.

Exhibit 6 Noncompliance for P-Card reporting was about 20%



Source: Auditor's Office analysis of Metro documents and Bank of America data

The second limitation was that discussion prompts were not detailed enough to ensure some risks would be consistently considered. For example, one form encouraged connecting with Information Services (IS), Human Resources, and Communications, but did not require it or indicate why it would be needed. Perspective from these departments could help Metro consider technology, personnel or reputational risks. Although evidence suggested these conversations were taking place, additional detail or requirements in the prompts would help ensure these types of conversations occur.

The identification of essential service and employees also had limitations. Metro developed guidance for thinking about essential functions and encouraged consideration of how the absence of the function would have a financial, revenue, legal or regulatory implication. This was not required, nor was it built into the templates used in designating essential functions. More effective guidance could require asking those questions about all functions and include consideration of controls such as segregation of duties and oversight.

For example, reduction in staffing and in-person activities can reduce capacity for project management oversight. Metro's Construction Project Management office considered this risk and developed a mitigation strategy for responding to it. Building these types of considerations into processes or templates can ensure they are made consistently across the agency as the response to the emergency evolves.

Ensuring adequate segregation of duties during an emergency may be a challenge because fewer employees are available to carry out a process. In some cases, this risk can be reduced with additional controls, such as supervisory reviews. But these too, can be impacted by reduced staffing. Considerations such as these may have been made when assigning essential functions, but they were not documented.

Control weaknesses during normal operations may also be exacerbated during emergencies. For example, our Office's prior work identified challenges with how Metro ensured segregation of duties. We observed continued weaknesses during this audit. Specifically, access reviews took place for some of Metro's information and financial systems, but not all. Training and guidance was insufficient for employees to make informed decisions, and procedures were not comprehensive enough to ensure proper segregation of duties. Coordination between subject-matter experts in IS, FRS, and the employees responsible for carrying out the procedure is needed for the process to be effective. Planning for how to mitigate additional control risks prior to an emergency may benefit Metro, as this level of coordination may not be possible during emergencies.

Lastly, we noticed a gap in the policy development and review process that could reduce attention to financial or technology risks. We found the development and revision of agency-wide policies for Covid-19 was coordinated across Metro staff and subject-matter experts. However, the documented process for revisions did not require involvement of IS and FRS. This reduced the potential for review by someone who could provide perspective about financial or technology risks.

SCOPE & METHODOLOGY

The purpose of this audit was to assess the current status of Metro's emergency management efforts. We had two objectives:

- 1. Determine the status of recommendations from the 2018 audit Emergency Management: Strengthen basic elements to prepare for disasters.
- 2. Identify opportunities for Metro to strengthen emergency management based on learnings from recent incidents.

The audit scope included activities carried out since the initial audit was released in October, 2018. To learn from recent incidents, we focused on Metro's response to Covid-19 and the 2020 wildfires.

To carry out the first objective, we interviewed Metro employees involved in aspects of emergency management. This included Metro leadership, department directors, and Metro employees. We reviewed drafts of Metro's Emergency Operations Plan, work products related to Metro's role in disaster debris, and continuity planning efforts for Metro's waste management operations.

To carry out the second objective, we reviewed agreements and information about the emergency uses of Metro facilities and other emergency management documents including situation reports. We also interviewed employees involved in the emergency facility uses.

We reviewed three agency-wide processes Metro developed in response to Covid-19 and evaluated them against risk management and internal control best practices to identify limitations. We reviewed controls related to P-Cards, project management oversight, and segregation of duties to understand the potential impacts of these limitations. This included conducting additional employee interviews and assessment of documents. We also conducted user walk-throughs of Metro's P-Card process and analyzed purchasing card data obtained from Bank of America and Metro staff.

This audit was included in the FY 2020-21 audit schedule. We conducted this performance audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

MANAGEMENT RESPONSE

Recommendation 1:

To strengthen its regional role during a disaster, Metro should: Complete appendices outlined in the Disaster Debris Management Plan.

RESPONSE:

In process. A contract was initiated to work on nine appendices at the start of COVID-19 in March 2020. The work was put on hold around June 2020 due to emergency management staff workloads for COVID-19 response and the disaster debris planner left Metro. The disaster debris planner position, retitled emergency management planner, was refilled in August 2021. Some appendices will be developed or revised based on lessons learned from participation in Cascadia Rising June 2022 and Cascadia Receding (Recovery exercise) in November 2022. Therefore, expected completion is early 2023.

Recommendation 2:

To strengthen its regional role during a disaster, Metro should: Specify what, if any, additional roles Metro intends to fulfill during a disaster.

RESPONSE:

In process. The Metro Emergency Operations Plan is complete and in graphic design prior to publication. Additional Metro roles during disaster response will need to be identified and clarified which will include thorough engagement with stakeholders. This work will resume once the COVID-19 response is significantly reduced.

Recommendation 3a:

To prepare for severe emergencies and disasters, Metro should: Clarify roles, responsibilities, and authority by: Determining which elements of NIMS, including ICS, it will use and formally adopt them.

RESPONSE:

Implemented. Metro Council formally adopted the National Incident Management System (NIMS) and Incident Command System (ICS) in December 2020 with <u>Resolution 20-5139.</u>

Recommendation 3b:

To prepare for severe emergencies and disasters, Metro should: Clarify roles, responsibilities, and authority by: Formally approving an agency-wide emergency operations plan.

RESPONSE:

In process. The draft plan is complete and in graphic design awaiting publication.

Recommendation 3c:

To prepare for severe emergencies and disasters, Metro should: Clarify roles, responsibilities, and authority by: Assigning responsibility to specific position(s) for maintaining the emergency

operations plan and procedures.

RESPONSE:

Implemented. The Emergency Manager is responsible for maintaining the emergency operations plan and procedures, and assigning roles and responsibilities.

Recommendation 3d:

To prepare for severe emergencies and disasters, Metro should: Clarify roles, responsibilities, and authority by: Providing training and exercises for the employees who will be involved in response and recovery operations.

RESPONSE:

In process. This recommendation is ongoing. Metro will participate in the June 2022 Cascadia Rising exercise. Exercise planning has started. It is also important to note that Metro has had to deal with a number of smaller emergencies during 2020 and 2021 that have allowed us to exercise our capabilities e.g. wild fires/toxic air quality (Sept/Oct 2020); major ice storm with associated organic debris (Feb 2021) and major heat event (summer 2021).

Recommendation 4a:

Formalize emergency procedures by developing written agency-wide procedures, at a minimum, for: Tracking and reporting emergency-related damage and costs.

RESPONSE:

In process: Finance and Regulatory Services has made progress in tracking and reporting emergency -related damage and costs during the COVID-19 pandemic, but is still working on formalizing those procedures.

Recommendation 4b:

Formalize emergency procedures by developing written agency-wide procedures, at a minimum, for: Manual payroll and vendor payment processes for when normal systems are unavailable.

RESPONSE:

In process: This recommendation is still in process. Significant progress has been made during the pandemic to build additional resilience into payroll and vendor payment processes, but staff shortages and ongoing pandemic response have limited the ability of the department to complete this project at this time.

Recommendation 5:

Maintain an up-to-date inventory of emergency resources.

RESPONSE:

In process. Generally, emergency resource inventories are costly to develop and impractical to maintain. The 2030 Regional Waste Plan identifies a resource inventory as a goal. The regional solid waste disaster preparedness group will explore whether it is practical to inventory some expensive, unique equipment.

Recommendation 6a:

Plan for continuity of operations by: Finishing current continuity planning efforts for solid waste and supporting functions.

RESPONSE:

Implemented. The solid waste facilities' continuity of operations plan is complete and published and has proved useful during a number of smaller emergencies that required facility closure or evacuation.

Recommendation 6b:

Plan for continuity of operations by: Planning for other essential and remaining agency functions.

RESPONSE:

In process: Metro leadership recognizes the importance of Continuity of Operations planning. Continuity of operations planning will begin with each department identifying their essential functions and employees. More detailed continuity of operations planning can only occur once the COVID-19 response has significantly reduced.

Recommendation 7a:

Improve emergency communication by: Developing a back-up emergency communications system.

RESPONSE:

In process: While Metro leadership recognizes the importance of back-up emergency communication systems, these are typically over \$1 million dollars and often rely on the same geographical locations as primary communications systems. Recent disasters, especially Hurricane Ida in New Orleans during August and September 2021, highlight the increased resilience of cellular communications from disruption. This indicates a reduced need for back up communication mechanisms. Metro will explore a few satellite phones for key leaders as budget allows.

Recommendation 7b:

Improve emergency communication by: Implementing a notification system(s) that reaches all Metro employees.

RESPONSE:

Complete. Emergency notification systems are expensive and require at least .30 FTE to maintain and manage the system. IS and the Emergency Management program explored a notification system and decided it was not cost effective based on current business needs. However, a phone line and associated procedures were created in which employees can call and get closure information.

Agenda Item No. 4.1

Consideration of the Council Meeting minutes for September 23, 2021

Consent Agenda

Metro Council Meeting Thursday, October 21, 2021

Metro 600 NE Grand Ave. Portland, OR 97232-2736 oregonmetro.gov Metro **Minutes** Thursday, September 23, 2021 10:30 AM https://zoom.us/j/615079992 or 888-475-4499 (toll free) **Council meeting** <u>&</u> **Council work session**

Council meeting

1. Call to Order and Roll Call

Present: 7 - Council President Lynn Peterson, Councilor Shirley Craddick, Councilor Bob Stacey, Councilor Christine Lewis, Councilor Juan Carlos Gonzalez, Councilor Mary Nolan, and Councilor Gerritt Rosenthal

2. Public Communication

Council President Peterson opened the meeting to members of the public wanting to testify on a non-agenda items.

Hearing none, Council President Peterson moved on to the next agenda item.

3. Presentations

3.1 Auditor's Office Annual Report

Council President Peterson introduced Brian Evans, Metro Auditor (he/him) to present on the topic.

Auditor Evans presented the annual report from the Office of the Auditor for fiscal year 2020-21. Auditor Evans gave an overview of the responsibilities of the Office of the Auditor and broke down the evaluation metrics. The Office of the Auditor's performance is measured by: average hours to complete an audit and number of audits, audits completed per full-time equivalent employee, total audit hours per department, auditee feedback, and audit recommendation implementation rate.

Auditor Evans discussed the auditor's office's budget, the audit schedule for fiscal year 2021-2022, and information around the Office of the Auditor's accountability hotline. He explained that three audits were released in fiscal year 2020-2021. Two audits are expected to be completed in October 2021 while three more will be started later this year.

4. Consent Agenda

A motion was made by Councilor Nolan, seconded by Councilor Lewis, to adopt items on the consent agenda. The motion passed by the following vote:

- Aye: 7 Council President Peterson, Councilor Craddick, Councilor Stacey, Councilor Lewis, Councilor Gonzalez, Councilor Nolan, and Councilor Rosenthal
- 4.1 Consideration of the Council Meeting minutes for July 29, 2021.
- 4.2 Consideration of the Council Meeting minutes for August 03, 2021.

5. Ordinances (Second Reading)

5.1 Ordinance No. 21-1464, For the Purpose of Annexing to the Metro District Boundary Approximately 1.82 Acres Located at 7115 NW Kaiser Road in the North Bethany Area of Washington County

Council President Peterson stated that the first reading and public hearing for Ordinance No. 21-1464 took place on September 9, 2021.

Council President Peterson introduced Tim O'Brien (He/Him) to present Ordinance No. 21-1464.

Tim O'Brien responded to Councilor Craddick's question to explain that there are only 64 acres left to be annexed into the Metro boundary.

Council Discussion

There was none.

A motion was made by Councilor Nolan, seconded by Councilor Stacey, that this Ordinance was adopted. The motion carried by the following vote:

Aye: 7 - Council President Peterson, Councilor Craddick, Councilor Stacey, Councilor Lewis, Councilor Gonzalez, Councilor Nolan, and Councilor Rosenthal

Coun	cil mee	ting		Minut	es		Sep	tember 2	3, 202 1
	5.2	Ordinance	No. 21-1465	, For t	he P	urpose o	f Amending	Metro	Code
		Chapters 7.	.05, 7.06 an	d 7.07 to	Add	Certain	Clarifications	and	Mak
		Housekeeping	Changes						
				ing for Ordi			e first reading an took place on	d	
				esident Pete o present O			chael Lembo 65.		
			Council Dis	cussion					
			There was	none.					
			Councilor I		his Ord	inance was	nal, seconded by adopted. The	/	
		Aye:					ddick, Councilor ez, Councilor		
				Councilor F					
5.	Adjou	urn to a Work Se	ssion						
			U				ent Peterson		
			-	the Metro C ncil Work Se		neeting and	moved on to th	e	
1.	Call to	o Order and Roll	Call						
				esident Pete order at 11:		led the Met	ro Council Work		
2.	Work	Session Topics:							
	2.1	Redistricting D	iscussion Worl	< Session					
			Council Pre	esident Pete	rson int	roduced An	ne Buzzini		
								,	

(she/her), Ina Zucker (she/her) and Michelle Bellia (she/her) to present the topic.

Ina summarized that redistricting is done every 10 years when census data is received and explained that today's discussion will be about values, outcomes and objectives for redistricting.

Anne presented questions to the Council, wanting Council to think about values, outcomes and objectives that Council wishes to instill and achieve in the redistricting process. Anne explained Council's role in redistricting and the legal requirements for redistricting, gave information about how the redistricting process went in 2001 and 2011, and proposed a timeline for the redistricting process to the Council with a final vote on new boundaries being held on or before December 16, 2021.

In response to questions from Councilors Gonzalez and Rosenthal, Ina detailed the level of public and Council involvement in the redistricting process in 2001 and 2011.

Council Discussion

Councilor Nolan explained that while each district must individually meet Metro's values, Metro as a whole must also meet these values.

Councilor Craddick expressed her support for the values from 2011 and believes they still hold today. Councilor Craddick added that she wants Council to consider communities of color and ethnic groups when redistricting and believes that these communities should be within the same districts.

Councilor Lewis expressed that she believes that Council should hold a standalone hearing or workshop to engage community in this process instead of just relying on regular Council Meetings and Work Sessions. Councilor Lewis added that transit service districts are important to consider throughout the redistricting process.

Councilor Rosenthal asked about the overall population growth per district in the last 10 years and how robust public engagement was in previous redistricting processes. Additionally, he highlighted that he believes that previous redistricting processes have worked well and he does not foresee major changes being necessary in District 3.

Councilor Gonzalez agreed with Councilor Lewis that transit districts should be considered during redistricting and wondered if Council can use this process to build on investment projects and make sure that specific points of investment are overseen within one district. Additionally, Councilor Gonzalez asked staff how involved Council will be throughout this process.

Councilor Stacy pointed out the opportunity to look at the area east of 82nd and west of Gresham that he feels has historically been underrepresented in council.

Metro Council President summarized that Council seems to appreciate Metro's current values as well as the Secretary of State's values for this process and that Council seems to want slightly more community engagement than what happened in 2011. Council President Peterson asked Councilors if they are interested in looking at completely redesigning districts or just dealing with districts that have either gown or shrunk.

Councilor Nolan asked staff if Metro has a budget for the redistricting process and about what financial, human, and technological resources have been approved for this

Council meeting	Minutes	September 23, 2021		
	process. Additionally, Councilor Nolan stated that th	ney		
	believe that the 2011 process was well done and th	at too		
	much community engagement may not further assi	st the		
	redistricting process.			
	Councilor Craddick showed her appreciation for the	2011		
	redistricting process and highlighted that transporta	ation		
	must also be considered within the redistricting pro	cess.		
	Councilor Craddick believes that moving District 1 farther			
	west could create benefits for Metro and the distric	t.		
	Council President Peterson highlighted that these d	istricts		
	should not create divides within the region and sum	nmarized		
	the Council discussion.			
3. Chief Operating Officer	Communication			
	Chief Operating Officer Marissa Madrigal (she/her/e	ella)		
	provided an update on the following events or item	s:		
	 Metro is hosting city managers for an event 	at the		
	Oregon Zoo on October 13			
	 New Communications Director Neil Simon s week 	tarted this		
	• The vaccine requirements policy			
4. Councilor Communicati				
	Councilors provided updates on the following meet	ings or		
	events:			
	 Councilor Stacey's replacement 			
	 Region 1 ACT meeting 			
	· MPAC			
	West Side Economic Alliance			
	 Oregon Transportation Plan Committee 			
	 Tour of Blue Lake and Oxbow Park put on by 	/ the		
	Parks and Nature Staff			

- The Wood Village City Hall grand opening
- · Oregon Walks "Steptember" events

City of Lake Oswego City Hall grand opening

5. Adjourn

There being no further business, Council President Peterson adjourned the Metro Work Session at 12:09 p.m.

Respectfully submitted,

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Stellan Roberta

Stellan Roberts, Legislative Assistant

ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF SEPTEMBER 23, 2021

ITEM	DOCUMENT TYPE	Doc Date	DOCUMENT DESCRIPTION	DOCUMENT NO.
1.0	PowerPoint	09/23/21	RID Patrol and Community Cleanup Progress Report PowerPoint	092321c-01
2.0	PowerPoint	09/23/21	Redistricting Process & Engagement PowerPoint	092321c-02
3.0	PowerPoint	09/23/21	Redistricting Initial 2020 Census Data PowerPoint	092321c-03

Agenda Item No. 5.1

Resolution No. 21-5210, For the Purpose of Declaring a Vacancy in the Office of Metro Councilor for Council District No. 6

Resolution

Metro Council Meeting Thursday, October 21, 2021

BEFORE THE METRO COUNCIL

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FOR THE PURPOSE OF DECLARING A VACANCY IN THE OFFICE OF METRO COUNCILOR FOR COUNCIL DISTRICT NO. 6 **RESOLUTION NO. 21-5210**

Introduced by Council President Lynn Peterson

WHEREAS, Bob Stacey was elected as the Metro Councilor for Council District 6 at the May 15, 2012, Primary Election for a four-year term, commencing on the 1st Monday of January 2013 and ending on the 1st Monday of January 2017; and

WHEREAS, Bob Stacey was re-elected as Metro Councilor for Council District 6 at the May 17, 2016, Primary Election for a four-year term, commencing January 2, 2017 through January 4, 2021; and

WHEREAS, Bob Stacey was re-elected as Metro Councilor for Council District 6 at the May 19, 2020, Primary Election for a four-year term, commencing on the 1st Monday of January 2021 and ending on the 1st Monday of January 2025; and

WHEREAS, Bob Stacey has tendered his resignation as Metro Councilor for Council District 6 effective October 15, 2021, pursuant to his letter to the Metro Council President dated September 15, 2021, attached hereto as Exhibit A; and

WHEREAS, Metro Code Section 9.01.050 provides that the vacancy in office shall be filled by the making of an appointment, by a majority of the remaining members of the Metro Council, no later than January 13, 2022, or 90 days from the date the vacancy occurs; and

WHEREAS, Metro Code Section 9.01.060 provides for the procedures to be followed by the Metro Council in making Metro Council appointments; and

WHEREAS, Metro is currently engaged in a redistricting process, and desires to wait until that process is complete to make the Metro Council appointment; now therefore,

BE IT RESOLVED:

1. That the Metro Council declares that as of October 15, 2021, a vacancy exists in the Office of Metro Councilor for Council District 6; and

2. That the Metro Council will commence the appointment process for filling the vacancy once redistricting is complete and as provided in Metro Code Section 9.01.060; and

3. That Metro Council President, Lynn Peterson, will establish and publish a schedule for the receipt of applications in December 2021.

ADOPTED by the Metro Council this 14th day of October, 2021.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

Agenda Item No. 6.1

Ordinance No. 21-1469A, For the Purpose of Establishing Criteria for Metro Council District Reapportionment and Declaring an Emergency

Ordinances (Second Reading)

Metro Council Meeting Thursday, October 21, 2021

BEFORE THE METRO COUNCIL

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FOR THE PURPOSE OF ESTABLISHING CRITERIA FOR METRO COUNCIL DISTRICT REAPPORTIONMENT AND DECLARING AN EMERGENCY ORDINANCE NO. 21-1469A

Introduced by Chief Operating Officer Marissa Madrigal with concurrence by Council President Lynn Peterson

WHEREAS, Section 31(1) of the Metro Charter establishes the minimum criteria for reapportionment of Council districts, requiring such districts as nearly as practicable to be of equal population and to be contiguous and geographically compact; and

WHEREAS, Section 31(1) of the Metro Charter further provides that the Council may by ordinance specify additional criteria for districts that are consistent with this section; and

WHEREAS, on September 16, 2021, Metro received data compiled by the 2020 U.S. Census; and

WHEREAS, the 2020 U.S. Census identifies the Metro population as 1,670,601, thereby establishing an average district population of 278,434; and

WHEREAS, the Metro Council wishes to set forth the criteria to be used in reapportionment of Council districts; now therefore

THE METRO COUNCIL ORDAINS AS FOLLOWS:

In addition to the criteria for council district reapportionment contained in Section 31(1) of the Metro Charter, which requires that "as nearly as practicable, all council districts shall be of equal population and shall be contiguous and geographically compact," the Council also specifies each of the following additional criteria in developing an apportionment plan:

- 1. The apportionment will comply with all applicable federal and state laws pertinent to voting rights of electors.
- 2. No council district will vary in population more than five percent (5.0%) from the average population of the district. "Average population" is that amount equal to one-sixth of the total Metro area population based on the data compiled by the 2020 U.S. Census. The Metro Council interprets the maximum variance of five percent to mean that no district may be more than five percent larger or more than five percent smaller in population than the average population.
- 3. While observing the maximum five percent population variance based on the 2020 census data required in Section (2) of this Ordinance, the Council will make every effort to create districts with population variances of zero percent (0.0%) based on the data compiled by the 2020 US Census.
- 4. In developing the reapportionment plan, the Council will give consideration to existing precincts and, to the maximum extent possible after meeting all other applicable criteria, will maintain communities of common interest. Such communities of common interest are represented in:

- a. Cities under 20,000 in population
- b. Compact minority or underrepresented communities and groups
- c. Corridors identified in the 2040 Growth Plan or corridors of regional significance in the Regional Transportation Plan
- d. Federally-recognized transit districts within the Metro boundary
- e. Regional centers, town centers, and investment areas identified in the 2040 Growth Plan
- f. Established neighborhood associations and community planning and participation organizations
- g. School districts
- 5. This ordinance being necessary for the health, safety and welfare of the Metro area for the reason that the work of reapportionment proceed without delay as stipulated in the Metro Charter, an emergency is declared to exist, and this ordinance shall take effect immediately pursuant to Metro Charter Section 38(1).

ADOPTED by the Metro Council this 21st day of October, 2021.

Shirley Craddick, Deputy Council President

Attest:

Approved as to Form:

Jaye Cromwell, Recording Secretary

Carrie MacLaren, Metro Attorney

BEFORE THE METRO COUNCIL

)

)

)

FOR THE PURPOSE OF ESTABLISHING CRITERIA FOR METRO COUNCIL DISTRICT REAPPORTIONMENT AND DECLARING AN EMERGENCY

ORDINANCE NO. 21-1469

Introduced by Chief Operating Officer Marissa Madrigal with concurrence by Council President Lynn Peterson

WHEREAS, Section 31(1) of the Metro Charter establishes the minimum criteria for reapportionment of Council districts, requiring such districts as nearly as practicable to be of equal population and to be contiguous and geographically compact; and

WHEREAS, Section 31(1) of the Metro Charter further provides that the Council may by ordinance specify additional criteria for districts that are consistent with this section; and

WHEREAS, on September 16, 2021, Metro received data compiled by the 2020 U.S. Census; and

WHEREAS, the Metro Council wishes to set forth the criteria to be used in reapportionment of Council districts; now therefore

THE METRO COUNCIL ORDAINS AS FOLLOWS:

In addition to the criteria for council district reapportionment contained in Section 31(1) of the Metro Charter, which requires that "as nearly as practicable, all council districts shall be of equal population and shall be contiguous and geographically compact," the Council also specifies each of the following additional criteria in developing an apportionment plan:

- 1. The apportionment will comply with all applicable federal and state laws pertinent to voting rights of electors.
- 2. No council district will vary in population more than five percent (5.0%) from the average population of the district. "Average population" is that amount equal to one-sixth of the total Metro area population based on the data compiled by the 2020 U.S. Census. The Metro Council interprets the maximum variance of five percent to mean that no district may be more than five percent larger or more than five percent smaller in population than the average population.
- 3. While observing the maximum five percent population variance based on the 2020 census data required in Section (2) of this Ordinance, the Council will make every effort to create districts with population variances of zero percent (0.0%) based on the data compiled by the 2020 US Census.
- 4. In developing the reapportionment plan, the Council will give consideration to existing precincts and, to the maximum extent possible after meeting all other applicable criteria, will maintain communities of common interest. Such communities of common interest are represented in:
 - a. Cities under 20,000 in population
 - b. School districts
 - c. Compact minority or underrepresented communities and groups

- d. Corridors identified in the 2040 Growth Plan or corridors of regional significance in the Regional Transportation Plan
- e. Federally-recognized transit districts within the Metro boundary
- f. Regional centers, town centers, and investment areas identified in the 2040 Growth Plan
- g. Established neighborhood associations and community planning and participation organizations
- 5. This ordinance being necessary for the health, safety and welfare of the Metro area for the reason that the work of reapportionment proceed without delay as stipulated in the Metro Charter, an emergency is declared to exist, and this ordinance shall take effect immediately pursuant to Metro Charter Section 38(1).

ADOPTED by the Metro Council this 21st day of October, 2021.

Lynn Peterson, Council President

Attest:

Approved as to Form:

Jaye Cromwell, Recording Secretary

Carrie MacLaren, Metro Attorney

IN CONSIDERATION OF ORDINANCE NO. 21-1469, FOR THE PURPOSE OF ESTABLISHING CRITERIA FOR METRO COUNCIL DISTRICT REAPPORTIONMENT AND DECLARING AN EMERGENCY

Date:	October 18, 2021	Prepared by: Anne Buzzini
Department:	Council Office	Presenters: Ina Zucker, Anne Buzzini
Meeting Date:	October 21, 2021	Length: 10 minutes

ISSUE STATEMENT

Every 10 years, following the completion of the U.S. Census, the Metro Council is required to evaluate whether each of its six districts are of relatively equal population, and to make adjustments to district boundaries as necessary to guarantee equitable citizen representation. The redrawn maps shift the boundaries of the six Metro Council districts to account for any uneven growth in the metropolitan region.

The U.S. Census data delivered this September indicated some districts present a significant difference from the average population; District 4 has grown in population at a greater rate than other districts in the last ten years, whereas District 1 grew in population at a slower rate.

The Metro Council has a legal requirement of three months from receipt of U.S. Census data (September 16, 2021) to complete the redistricting process. Council must adopt new boundaries in early December 2021, to meet legal timelines for redistricting, and to afford adequate notice for the appointment process for the upcoming vacancy in District 6.

ACTION REQUESTED

Staff seeks Council approval of an ordinance that outlines additional criteria for the 2021 redistricting process.

STAFF RECOMMENDATION

Staff recommends adoption of the ordinance to provide formal direction to staff on additional criteria, to improve transparency and accountability, and to meet legal deadlines related to redistricting.

BACKGROUND

At the October 5th work session, Council reaffirmed its direction to instill the following values in the 2021 redistricting process:

- Lead with racial equity: Metro actively engages communities of color in redistricting and considers impacts of redistricting on communities of color, both within districts and regionwide.
- **Transparent and accessible**: Residents feel welcome and find ample opportunities to share their thoughts about redistricting with Metro Council and staff.
- Accountable: Metro Council districts are of equal population and reflect the region's changing demographics. Every effort is made to ensure communities of common interest are kept intact.

At the same work session, Council directed staff to move forward with a public engagement process that includes:

- A Subcommittee on Redistricting
- Ongoing consultation with community partners and stakeholders, including cities, counties, MPAC, community based organizations, and others
- Two public hearings, independent from ordinance readings
- A page on Metro's website with information about redistricting
- Opportunity for written public comments

The ordinance seeks to formalize Council's commitment to these values. The communities of common interest are not listed in any order of priority. Staff has received direction from Council to work with community partners, the public, and the Subcommittee on Redistricting to determine relative priorities for criteria.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

Legal Antecedents: US Constitution, federal Voting Rights Act, Oregon Secretary of State 2021 Redistricting Directive, Metro Charter Section 31(1), Metro Ordinance 11-1258, Metro Ordinance 01-895.

Anticipated Effects: Metro Council may choose to adopt an ordinance defining the values, outcomes, and process for redistricting prior to adopting new boundaries by ordinance on or before December 16, 2021.

Financial Implications: The resources available for this project include existing FTE and materials and services budgets. Staff from the Council Office will collaborate with staff from other departments on an as-needed basis, which may include Planning and Development, Communications, DEI, and Government Affairs. For technology, if resources beyond existing capacity are needed, existing materials and services budgets will be used to cover the costs.

ATTACHMENTS N/A

Supportive Housing Services Resolution Report

Work Session Topics

Metro Council Work Session Thursday, October 21, 2021

IN CONSIDERATION OF RESOLUTION NO. 21-5187A

SUPPORTIVE HOUSING SERVICES BUDGET RESOLUTION REPORT

Date: October 21, 2021 Department: Planning, Development & Research

Presenter(s) (if applicable): Patricia Rojas, Nui Bezaire

Meeting Date: October 21, 2021

Length: 1.5 hours

Prepared by: Patricia Rojas, patricia.rojas@oregonmetro.gov

ISSUE STATEMENT

On May 19, 2020, greater Portland voters approved Measure 26-210, establishing Metro's regional supportive housing services (SHS) program to address homelessness and help people find and keep safe, stable, affordable housing across the region.

This program brings a groundbreaking level of regional coordination and scale to address this region wide challenge. Multnomah, Clackamas and Washington Counties developed local implementation plans which were high-level framework documents. Plans were developed through inclusive engagement that centered people with lived experience of homelessness and BIPOC communities, were informed by engagement with community and local practitioners, incorporated an analysis of local conditions and needs, and included an equity analysis to create the framework for programmatic strategies and investments. Plans were endorsed by local advisory bodies, boards of county commissioners, the SHS Regional Oversight Committee and approved by Metro Council.

The local implementation plans support a local response specific to the needs of each county. The measure also contemplated a regional nature of the SHS program and incorporated the Tri-County Planning Body (TCPB) to strengthen coordination and alignment of program implementation across the Metro region.

Since the measure's passage, the visibility and impacts of homelessness have increased due in large part to the societal impacts of the COVID-19 global pandemic. Addressing this crisis in our community requires a balanced and compassionate approach in order to end homelessness for thousands of individuals while simultaneously providing increased and effective options for safety on and off the streets. The SHS program and our local implementation partners incorporate a range of proven strategies to serve people experiencing homelessness, including safety-off-the-streets strategies such as a variety of emergency shelter options, with the ultimate goal of permanently ending their homelessness through safe, stable, and supported affordable housing.

Metro Council is committed to transparency, oversight and accountability and assuring that SHS implementation reflects the sense of urgency in action necessary to address the need. On June 17, 2021, the Metro Council passed Resolution No. 21-5187A, directing the Metro Chief Operating Officer to develop and coordinate analysis and assessment of supportive housing services strategies and programs to evaluate ongoing regional need. Staff will present report findings in response to Council Resolution No. 21-5187A.

ACTION REQUESTED

Staff request that Metro Council to take the following informal actions:

- Direct Metro staff to submit a Site Development Analysis proposal that includes scope of work, staffing, timeline and budget to assess the feasibility of using Metro owned sites for emergency shelter. Completion of a site development analysis of Metro owned sites will provide the information required to answer the questions posed by Council and provide the information necessary for Council to make future policy decisions about usage of Metro owned sites for emergency shelter purposes.
- Affirm support for the Local Implementation Plans (LIP) approved by Council over the last six months. LIP's have created a pathway for the roll-out of safety-off-the-street and safety-on-the-street measures to provide new options for life saving services and emergency shelter this winter and over the fiscal year.
- Affirm efforts under way by counties, in partnership with Metro staff, to improve data capacity including the analysis of homelessness inflow and outflow data to better understand need for services.
- Leverage the future Tri-County Planning Body to address the regionalization of data practices and such as improving inflow and outflow data analysis.

IDENTIFIED POLICY OUTCOMES

Supportive Housing Services Program implementation is guided by the following principles, which were developed by a stakeholder advisory table:

- Strive toward stable housing for all;
- Lead with racial equity and work toward racial justice;
- Fund proven solutions;
- Leverage existing capacity and resources;
- Innovate: evolve systems to improve;
- Demonstrate outcomes and impact with stable housing solutions;
- Ensure transparent oversight and accountability;
- Center people with lived experience, meet them where they are, and support their self-determination and well-being;
- Embrace regionalism: with shared learning and collaboration to support systems coordination and integration; and

- Lift up local experience: lead with the expertise of local agencies and community organizations addressing homelessness and housing insecurity.

Through these principles, implementation partners have committed to meeting the following goals for the ten-year program:

- Prioritize funding for households experiencing chronic homelessness, especially Communities of Color
- 5,000 households experiencing chronic homelessness connected to permanent supportive housing;
- 10,000 households at risk of or experiencing homelessness stabilized in permanent housing;
- Eliminating racial disparities in access to services and outcomes of supportive housing services programs;
- Reaching a milestone where there are enough supportive housing resources in the region to house more chronically homeless households each month than there are households experiencing chronic homelessness that month (also called functional zero); and
- Creating a regionally-aligned flexible rent assistance program and developing additional strategies to advance regional alignment and coordination via the Tri-County Planning Body.

In the first program year (July 2021-June 2022), implementation partners expect to:

- 1. Expand shelter capacity by at least 900 beds
- 2. Connect 2,400 people to permanent housing, including:
 - 2(a) 1,300 chronically homeless households to supportive housing
 - 2(b) 1,100 households at risk of or experiencing homelessness to rent assistance and services
- 3. Prevent 1,000 households from eviction/becoming homeless
- 4. Grow the network of services providers, especially culturally specific providers
- 5. Integrate behavioral health services into outreach, shelter and housing programs

STAFF RECOMMENDATIONS

In response to the Council's request for information, staff recommend that counties continue to improve homelessness inflow and outflow analysis as proposed in local implementation plans (LIP's), which includes tri-county partnerships with third-party homelessness data analysis experts, increased jurisdictional data capacity and tri-county alignment in data practices. Staff also recommend that the Tri-County Planning Body incorporate data alignment and the improvement of inflow and outflow analysis into the development of a regional data framework for incorporation into the future Tri-County Regional Plan. Transparency and accountability in SHS implementation consistent with the approved LIP's will be key to showing we are acting urgently and effectively.

Quarterly progress reports to Council on all year-one goals, as well as an annual report on LIP progress from each county will support public accountability and transparency on programmatic progress in areas such as but not limited to increases in housing placements and shelter capacity.

Additionally, staff began the first phase of Metro site analysis for shelter use. Staff recommend that the Council initiate a phase two site analysis with the Metro COO and departmental staff by conducting a development analysis of Metro-owned sites to determine feasibility for future use as temporary emergency shelter and/or housing.

Staff also recommend that Council leverage the SHS Tri-County Planning Body to identify opportunities and issues of regional concern in SHS implementation.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

With the passage of Measure 26-210, the voters of the Greater Portland region entrusted Metro with addressing the region's housing and homelessness crisis. In its commitment to the responsibilities of transparency, oversight and accountability, Metro Council is requesting ongoing information and context as well progress data to assure that the SHS program is delivering on the promises made to voters. Resolution No. 21-5187A, directed the Metro Chief Operating Officer to provide a report and presentation to Metro Council that provides regional information concerning homelessness and emergency shelter, including current and planned shelter capacity; an inventory of Metro-owned properties that could be considered for siting shelter; and the current scope of unsheltered homelessness across the three counties.

The Metro Chief Operating Officer and Supportive Housing Services (SHS) staff thank Metro Council for this request. We recognize and appreciate the urgency and attention given to ensuring that the SHS program delivers housing and stabilization services for people experiencing or at risk of homelessness in our region, especially as we continue to face more unpredictable and extreme climate conditions.

The voters of the Metro region have opened an opportunity for transforming our ability to respond to a housing and homelessness crisis decades in the making and compounded by a global pandemic. The regional Supportive Housing Services program brings an unprecedented level of regional investment and coordination in addressing homelessness. The program creates great potential to meet short-term health and safety needs, as well as long-term permanent housing solutions.

Metro and our county partners are acting with urgency and working tirelessly to stand up new programming, while simultaneously expanding emergency responses such as shelter (increasing year-round and seasonal capacity by approximately 900 beds- more if COVID distancing restrictions change) in the first year of programming, and permanent housing options, including` permanent supportive housing for those experiencing chronic homelessness. Housing is a critical component of shelter efficacy. More housing means more people leaving shelter, more shelter bed capacity, greater individual and community benefits from each bed, and better use of public dollars.

The key to understanding the potential impacts of adding shelter capacity depends on who shelter serves and how. Better understanding the complexities of inflow and outflow and how our homeless services system is responsive to those dynamics is critical to understanding any unmet need for housing as well as for shelter.

While our current data on the dynamics of homelessness, especially inflow, is limited, SHS will help improve our region's data tracking, quality, analysis and program evaluation capabilities to better understand the experiences of households experiencing chronic homelessness as they are served in homeless system programs, and how quickly the system can connect these households to permanent supportive housing.

SHS will also expand our ability to move people out of homelessness and into permanent housing by bringing on more outreach, housing placement and case management staff into the community and allowing us to expand our rent assistance funding including the launch of a local regional longterm rent assistance program for those with longterm barriers to permanent housing stability.

BACKGROUND

In May 2020, voters approved Measure 26-210 to "prevent and reduce homelessness in Washington, Clackamas and Multnomah counties."¹ The Metro Council has directed that implementation partners must have an approved Local Implementation Plan in order to receive Supportive Housing Services funds. Metro's adopted Supportive Housing Services work plan (Resolution No. 20-1548) further defined Local Implementation Plans' purpose, process of development and review, and required elements, including "local housing and homeless service needs, current programming and unmet programming capacities, and proposed use of funds in accordance with the purposes of the regional Supportive Housing Services Program."

Council's direction established Local Implementation Plans as high-level frameworks that set local priorities and actions based on identified gaps and regional outcomes. Recognizing how systemic racism is reflected in racial disparities in the region's homelessness and housing crisis, the plans were required to be developed through inclusive community engagement that centers the voices of Black, Indigenous and people of color communities as well as people with lived experience of homelessness and housing instability. The plans also commit Local Implementation Partners to be accountable for tracking and reporting on regionally-identified outcomes, particularly racial equity outcomes.

County partners developed their plans between fall 2020 and winter 2021. As required, the plans were developed through inclusive engagement that centered people with lived

¹ Ballot Measure 26-210 as it appeared on ballots in the Multnomah County May 2020 Primary

experience of homelessness and BIPOC communities, were informed by engagement with community and local practitioners, incorporated an analysis of local conditions and needs, and included an equity analysis to create the framework for programmatic strategies and investments.

By spring of 2021 all Local Implementation Plans had been approved locally, by the Supportive Housing Services Regional Oversight Committee and by Metro Council. By July 2021, program funding was made available to county partners and programming officially began.

This program brings a groundbreaking level of regional coordination and scale to address the regionwide challenge of homelessness. The LIP investment strategies create a path for our region to simultaneously address emergent life and safety needs of thousands of people while creating pathways out of homelessness and into permanent housing for thousands more. The plans call for significant expansion of immediate and long-term strategies for safety on and off the streets, including shelter, outreach and housing program expansions.

Even while navigating the ongoing operational demands of the pandemic, county partners have been hard at work with system expansion, ramping up to deliver over **900 new shelter beds** and **2,400 permanent housing opportunities** within this first program year. This includes a "no turn away" shelter policy in Multnomah County during severe weather events.

By next summer, when the risk of severe heat looms, the region will have expanded its shelter capacity by 40%. Counties will pair this added capacity with housing-focused services, which, along with flexible rent assistance resources, will improve outflow from shelter to permanent housing, ending homelessness for those who secured housing and freeing up more shelter beds for households experiencing homelessness.

Shelter is an emergent response that functions most effectively as part of a larger system focused on connecting people experiencing homelessness to permanent housing as quickly as possible. Shelter serves people coming from a variety of situations including, but not limited to, those living unsheltered. However, it is not a viable option for every person or family experiencing homelessness; and moreover, entering temporary shelter is not a requirement for accessing the safe, supportive and permanent housing that Metro and our partners are working to create.

Therefore, an effective strategy to meet the needs of those living outside also involves support that can be brought directly to encampments, including help to find housing. This kind of outreach is an important part of the SHS vision, our county partners' plans and in meeting the expectations of voters. County partners are using SHS to expand outreach teams to bring behavioral health and housing services directly to the places where people are right now.

Finally, the best way to end homelessness is by helping people stay in their homes to begin with. SHS will bring resources that prevent homelessness thereby reducing the demand for homeless services in the future.

The attached report provides additional context and detail on the region's shelter response system, including current capacity, the scale of added capacity, services enhancements, and most importantly, the expansion of permanent housing resources to address and reduce homelessness.

ATTACHMENTS

[Identify and submit any attachments related to this legislation or presentation]

• Memorandum to Council in response to Resolution 21-5187A and its exhibits

[For work session:]

- Is legislation required for Council action? "Yes "No
- If yes, is draft legislation attached? "Yes "No
- What other materials are you presenting today? [INSERT]

Memorandum

DATE: September 7, 2021

TO: Metro Council and Policy Advisors

FROM: Marisa Madrigal, COO

RE: Supportive Housing Services Budget Resolution

Summary

Metro Council Resolution 21-5187A directed the Metro Chief Operating Officer to provide a report and presentation to Metro Council that provides regional information concerning homelessness and emergency shelter, including current and planned shelter capacity; an inventory of Metro-owned properties that could be considered for siting shelter; and the current scope of unsheltered homelessness across the three counties. This memorandum and its exhibits serve as that report.

The Metro Chief Operating Officer and Supportive Housing Services (SHS) staff thank Metro Council for this request. We recognize and appreciate the urgency and attention given to ensuring the SHS program is adequately providing housing and services for people experiencing or at risk of homelessness in our region, especially as we continue to face more unpredictable and extreme climate conditions.

Our region has never had the level of regional investment in addressing homelessness that SHS brings, and there is great potential to meet short-term health and safety needs as well as long-term permanent housing solutions. This work is already underway as our county partners work tirelessly to stand up new programming, while simultaneously expanding emergency responses such as shelter, and permanent housing options, including permanent supportive housing for those experiencing chronic homelessness. In this fiscal year alone, county partners will:

- Significantly expand permanent housing options;
- Deploy additional resources that serve people living unsheltered, including expanded **outreach teams** with peer workers and behavioral health supports;
- Enhance existing shelter programs with more housing navigators and behavioral health services;
- Expand shelter capacity by at least 625 beds (more if COVID distancing restrictions change);
- Improve data tracking, quality, analysis and program evaluation capabilities to better understand the experiences of households experiencing chronic homelessness as they are served in homeless system programs, and how quickly the system can connect these households to permanent supportive housing.

Background

Metro Council has approved all three required County Local Implementation Plans (LIPs) of the voterapproved regional supportive housing services (SHS) measure. Each LIP framework and set of investment strategies create a pathway for our region to address emergent life and safety needs of thousands of individuals and create a pathway out of homelessness and into housing. As required by the measure, LIPs were each developed through extensive community engagement processes that centered the perspectives of Communities of Color and people with lived experience of homelessness. The investment strategies in each of the LIPs reflect that input and feedback. Each county's plan is grounded in the priorities and values developed by Metro's SHS stakeholder advisory table. These values are also included in the SHS Work Plan adopted by the Metro Council in December 2020. These values include:

- Strive toward stable housing for all;
- Lead with racial equity and work toward racial justice;
- Fund proven solutions;
- Leverage existing capacity and resources;
- Innovate: evolve systems to improve;
- Demonstrate outcomes and impact with stable housing solutions;
- Ensure transparent oversight and accountability;
- Center people with lived experience, meet them where they are, and support their self-determination and well-being;
- Embrace regionalism: with shared learning and collaboration to support systems coordination and integration; and
- Lift up local experience: lead with the expertise of local agencies and community organizations addressing homelessness and housing insecurity.

Permanent Housing and Shelter Goals in Local Investment Plans

In keeping with these values, permanent housing is a focal point in each of the LIPs. Permanent housing with supportive services is a proven solution. In the first year alone, over 2,400 new permanent housing opportunities are expected to be created throughout the region as a result of SHS measure funding. The expansion of permanent housing options has been demonstrated across the nation to be critical in reducing homelessness, especially chronic homelessness, in a fiscally-responsible and lasting way.¹

Emergent responses such as temporary shelter are important components of an effective homelessness response system, but only to the extent that people flow quickly out of their shelter stay and into permanent housing. This opens up a bed for someone else who is experiencing unsheltered homelessness or is in an unsafe condition.

National experts agree that before significant resources are spent on increasing shelter capacity, it is imperative that current shelters are fully utilized and that there are immediate opportunities for shelter guests to connect to secure permanent housing, otherwise "each new shelter bed will quickly fill up, and unsheltered homelessness will continue to grow. A community must consider how each person will exit to housing from that shelter."²

The counties' LIPs are structured with this best practice in mind. In their LIPs, counties committed to simultaneously improving existing shelter throughput and increasing shelter capacity. Strategies include operations improvements to align with best practices, better data collection to understand and address

¹ Many studies show that permanent housing solutions reduce homelessness. Here are two: 1. Rand Corporation. "<u>Supportive Housing Reduces Homelessness—and Lowers Health Care Costs by Millions</u>." Rand Review; 2. Urban Institute. "<u>Breaking the Homelessness-Jail Cycle with Housing First: Results from the Denver Supportive Housing Social Impact Bond Initiative</u>." ² National Alliance to End Homelessness. Blog. "<u>Would Adding More Emergency Shelter Help Reduce Unsheltered</u> Homelessness? It's Complicated…"

homeless system inflow and outflow, and a significant expansion of capacity, especially in Washington and Clackamas counties, where current capacity is most limited.

By summer 2022, as SHS measure funding concludes its first year, the region will expand shelter capacity by approximately **565 year-round beds**.

- 65 year-round beds in Clackamas County
- 100 year-round beds in Washington County
- 400 year-round beds in Multnomah County

In addition, counties will permanently add over **250 beds of seasonal winter shelter capacity**, as well as capacity to serve anyone seeking shelter during severe winter weather events. Finally, using other funding sources, county partners will bring online even more shelter beds in the coming year, including alternative shelter models such as safe rest villages. See Figure 3.

Thanks to this increase in capacity, staff expect that within this fiscal year, **the region will have more shelter beds than there are unsheltered people at any given time**. This will be critical as we face more heat waves and other extreme weather in the future, as homeless individuals are some of the most vulnerable these disasters.

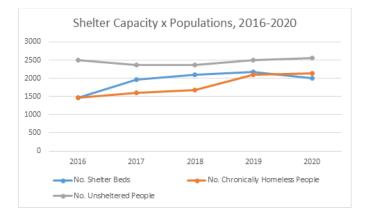
Our region has yet to realize the benefits of this significant regional shelter expansion, as initial SHS funding was made available only two months ago - in July 2021. It takes time to site, build and staff new shelter operations, and county partners are hard at work to open hundreds of new shelter beds over the next few months.

Current Situation

Unsheltered and chronic homelessness are not new issues within the Metro region – our communities have experienced this humanitarian crisis for decades. What has changed in recent years is the scale of the problem, as well as public perception of it. Like the Metro region, communities across the West Coast have seen significant increases in unsheltered and chronic homelessness over the past several years³, and communities have been addressing this in various ways, from expanding homeless outreach teams to expanding permanent housing solutions to testing alternative models of sheltering. Public pressure to find quick-fix solutions has grown, especially as unsheltered homelessness appears to be more visible in places where it was not visible before.

According to HUD Point-in-Time counts, the Metro region as a whole saw steady increases in both chronic and unsheltered homelessness between 2016 and 2020. This happened despite increases in shelter capacity over that same time period.

³ Refer to the HUD <u>Annual Homeless Assessment Reports</u> to Congress for more information



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Figure 1: Shelter Capacity x Point-in-Time Populations, 2016-2020⁴

The following pages provide data and information on regional shelter capacity as well as the scope of unsheltered and chronic homelessness across the region, as requested by Metro Council. This report provides this information with the caution that shelter analysis should not be done in a vacuum, absent full understanding of whether existing shelter resources function successfully within our regional homeless systems, and whether there are adequate resources connected to shelters to decrease shelter demand and increase outflow to permanent housing.

Figure 2: Homeless System Inflow & Outflow Model⁵



Finally, increasing shelter capacity in any community takes time. After moving mountains to open many new temporary shelters in a short period of time to mitigate the impacts of COVID, regional partners have continued to work tirelessly to gain community support to site additional shelters, bring facilities online and hire enough staff to run them.

Shelter Capacity Across the Region

To develop this report, Metro staff sought shelter bed capacity information from our partners at Clackamas, Multnomah, and Washington Counties. Clackamas and Washington counties provided total beds for existing year-round and seasonal shelters as of June 2021, and Multnomah County's total is as of August 2021. This capacity includes a combination of government and NGO owned and/or operated

⁴ Continuum of Care Housing Inventory Charts and Point-in-Time Counts can be found on HUD's CoC website

⁵ City of Portland. <u>Mayor Ted Wheeler Conversations on Homelessness</u>. Ending Homelessness Inflow/Outflow graphic.

sites. More information about the particular shelter providers can be found in each county's Continuum of Care (CoC) Housing Inventory Count (HIC), which was last reported to HUD in January 2020.

- <u>Clackamas County CoC</u>
- Portland, Gresham/Multnomah County CoC
- Hillsboro, Beaverton/Washington County CoC

The counties also provided Metro staff with their anticipated additional year-round and seasonal shelter bed capacity that will be in operation by December 2021. These numbers are approximate, and some figured are still to be determined. It should be noted that seasonal winter bed capacity can vary significantly from year to year, as seasonal shelter often must be located or sited differently each year, often with different partners from year-to-year, as they are often short-term or, in some cases, 'standby' operations.

Figure 3: Current and Planned Shelter Bed Capacity, Fiscal Year 21/22

	Clackamas County	Multnomah County	Washington County
Current shelter	260 total beds	1,740 total beds**	281 total beds
capacity (beds)	(139 year-round)	(all year-round)	(131 year-round)
New shelter capacity			
capacity			
New beds by Dec.	TBD*	280 beds***	160 beds
2021		(130 year-round)	(122 year-round)
Additional beds by			
Summer 2022 (SHS	65 beds	120+ beds	TBD****
goals)			
Other shelter bed	N/A	300 severe weather	N/A
capacity		beds****	
		TBD safe rest villages*****	
Total bed capacity	260+ beds	2,020+ beds	441 beds
by Dec. 2021		+300 during severe	
current + new by		weather	
Dec.)			
Total bed capacity	325 beds	2,140+ beds	441 beds
Summer 2022		+300 during severe	
(complete total)		weather	

*Clackamas County partners are currently in negotiation and planning for shelter capacity for the Winter season **Total includes privately-funded beds that do not appear in the community's Housing Inventory Chart. Total does not include COVID isolation motels (capacity for an additional 80)

***Total bed capacity depends on COVID distancing requirements. Should those requirements become less restrictive, Multnomah County could gain 400 additional beds.

****Multnomah County increases shelter capacity to accommodate sheltering needs during severe weather events.

When those events occur, the County can expand bed capacity by 300+ when needed.

*****Safe rest villages planning is underway and the exact capacity is to be determined. These are set to be open by Winter.

******Washington County will meet its LIP shelter goals by Winter. Additional capacity is to be determined.

As indicated in the above chart, the region will see a significant expansion of shelter by this winter and an even larger expansion by summer 2022. In addition to county partners bringing more winter shelter beds into operation, Multnomah County develops a severe weather response each year in collaboration with community partners, including Metro (i.e., the Convention Center). This is to accommodate a 'no turn away' policy that ensures a shelter bed for anyone seeking one during periods of severe winter weather.

Excluding severe weather capacity and additional bed numbers yet to be determined, the region will have approximately 2,906 shelter beds by summer 2022.⁶ If COVID distancing restrictions are no longer needed during this period, the region could gain hundreds of additional beds in existing facilities.

Scale of Homelessness Across the Region

Council requested "an estimate...of the number of people likely to have no warm and dry, clean and secure sleeping options for 2021-22 Winter." This request also asked for data on the total number of homeless individuals within the Metro region.

There are two key public reports that capture estimated numbers of people experiencing homelessness across the region. One is each county's annual HUD Point-in-Time Count⁷ and the other is a 2019 report (Exhibit C) written by Portland State University (PSU) that takes various data sources and definitions into account (including the Point-in-Time Count) to develop a regional estimate of people and households experiencing homelessness over the course of a year. The HUD reports do not include people who are living doubled up. The PSU report does include people living doubled up. Those reports estimate the scale as follows:

Figure 4: Regional Homeless Population Estimates

HUD Point-in-Time, 2020 ^{8*}	PSU Report, 2019 (estimates over one year)
2,567 people unsheltered	5,287 people unsheltered
2,576 people sheltered	13,135 people sheltered
N/A people doubled up	19,840 people doubled up
5,143 people total	38,263 people total

*Multnomah and Clackamas County Continuums of Care conduct full (includes count of unsheltered) Point-in-Time counts every two years. 2020 was not a full count year, so the totals included people sheltered but not unsheltered. In the case of 2020 and other even-numbered years, the unsheltered number reported to HUD is the same number as the unsheltered number in the prior PIT year.

⁶ Includes year-round and seasonal beds, which are available only in winter.

⁷ Please see <u>Point-in-time data for Continuums of Care in the State of Oregon</u> to access the data.

⁸ Includes aggregated figures from Clackamas, Multnomah and Washington County's Continuum of Care Point-in-Time Count reports to HUD.

The regional scale of homelessness depends on the definitions used and whether that scale is captured in any given point in time or whether it is captured over a period of time (e.g., one year). From the data, we can see that approximately 2,567 people across the three counties were unsheltered on a single night in January 2020, while approximately 5,287 people are estimated to experience unsheltered homelessness on at least one night over the course of one year.

However, the above data does not tell us how many people may or may not have access to (let alone would seek) a shelter bed as a warm, dry, clean and secure sleeping option. To address the second part of Council's request, we need to consider a broader context: how the shelter system operates within a larger system and who shelter serves.

Considering an expansion of shelter using only population and inventory data (e.g., shelter need = total unsheltered population – total bed capacity) misses critical components of analysis. For example, shelters can serve people coming from housed situations (i.e., fleeing domestic violence) and unhoused situations (camping outside, staying in a car). Thus, homeless population counts and unsheltered data alone are insufficient to predict the total inflow, or demand, that would be placed on shelter at any given time.

Shelter beds turn over, serving more than one person per bed over the course of a year. According to the SHS *Tri-County Data Scan* report (Exhibit D) prepared by Kris Smock for Metro, the region served approximately 6,397 people with a 2,433 bed capacity in fiscal year 19/20.⁹ This means that beds turned over, on average across the region, about 2.6 times.¹⁰ Bed turnover can occur more frequently and consistently when there are permanent housing resources for each household to move into – or in other words, flow out from the shelter. When there are not sufficient permanent housing options, people either get "stuck" with long stays in shelter or cycle between sheltered and unsheltered situations, which can be especially traumatic.

Regional Data Capacity Improvements

A critical part of estimating shelter capacity needs is collecting and using the right data that will provide sufficient insight into shelter demand (inflow) and how often supply becomes available (turnover due to outflow).

National experts have emphasized the importance of using data to better understand shelter inflow and outflow. Deeper analysis of Homeless Management Information System (HMIS) and other community data can yield insights into:¹¹

- Shelter use patterns and changes in them;
- Identifying people who cycle in and out of shelter who may need targeted interventions like permanent supportive housing;
- Understanding reasons behind lengths of stay in shelter and work to reduce the average length of stay while at the same time increasing exits to permanent housing.

⁹ This total includes winter and severe weather shelter beds, which are not available year-round.

¹⁰ This number reflects an average across the region and should not be used as a turnover number for any individual county or program. It also includes winter and severe weather beds, which are not available year-round.

¹¹ Summarized from United States Interagency Council on Homelessness. "<u>Key Considerations for Implementing Emergency</u> <u>Shelter Within an Effective Crisis Response System</u>."

In their LIPs, the counties committed to scaling up data capacity and coordinating it regionally. One key project that is already underway is Community Solutions' <u>Built for Zero</u> program, which helps to improve and regularly use community homeless system data, which includes the development of a monthly by-name list of people experiencing chronic homelessness, to help bring chronic homelessness to functional zero.¹² All three counties are or are in the process of signing onto this program. The Built for Zero program, along with SHS investments in data capacity, will help the region better understand and predict shelter inflow and outflow specific to the chronically homeless and unsheltered populations.

Until we have a better idea of how new housing resources will impact shelter outflow, we will not be able to estimate the total number of beds needed across the region. This requires us allowing enough time for county partners to bring housing programs online, fulfill their shelter expansion commitments and make progress on developing improved data quality and analysis systems and practices.

Metro Owned Sites

In addition to the information above, Metro Council directed staff identify the inventory of Metro properties that could be considered for providing additional temporary warm and dry, clean and secure sleeping options (or shelter). Staff performed preliminary analysis on the list of **193 Metro owned sites** in an attempt to exclude some options from consideration for use as shelter (and/or housing) if those sites did not seem appropriate (e.g., a cemetery or transfer station). This analysis is not meant to indicate the feasibility of a particular site's usage for shelter, as that requires in-depth site analysis that depends upon the type of shelter proposed. There are many different shelter models, from tent villages to congregate sheltering in buildings, as well as non-congregate motel options. The use of any particular site, permit needs and build-out/improvement requirements depend upon the model(s) considered.

The map on the next page (and in Exhibit F) provides a snapshot of all Metro-owned properties, with more details provided in Exhibit E.

¹² Functional zero simply means that a community has more outflow out of homelessness than inflows into homelessness. It has effectively ended the crisis of homelessness for a particular population.

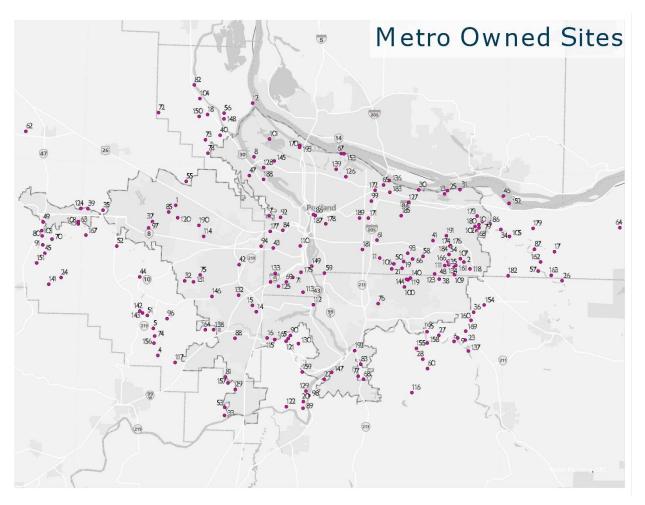


Figure 5: Map of Current Metro Owned Sites

Metro currently owns 193 sites and manages 143 of them. The majority of these sites are parks and/or natural areas that are zoned in a variety of ways, including several single, multifamily and mixed-use residential sites. Metro also owns three vacant properties, as well as sites that are likely not appropriate for shelter such as transfer stations and cemeteries. One of Metro's sites, the Oregon Convention Center, is already used for severe weather sheltering, and negotiations are underway to explore use of the Expo Center as a shelter site.

Exhibit E provides a detailed list of each shelter site that includes the size, type and general zoning of each site, along with whether that site is managed by Metro, is within Metro's Urban Growth Boundary, has a building on site, and the proximity of the site to public transit. Preliminary staff assessment for each site is included in this chart. The assessment notes sites that may not be appropriate for shelter use (transfer stations, cemeteries, wetlands).

No final determinations can be made on the suitability of most Metro-owned sites for shelter use at this time. Reviewing these sites brings up a set of complex questions that not one department or dataset can answer. We should also consider use of these sites for permanent housing, to support counties in meeting their supportive housing goals. Additional analysis in cooperation with managing departments and local jurisdictions, community partners and service providers is needed to determine the site

feasibility for use as shelter and/or housing. This would include, at minimum, zoning and code allowances, as well as permitting abilities.

In Summary

It "should not be assumed that every community in which there are currently people experiencing unsheltered homelessness needs to expand the supply of emergency shelter."¹³ Shelters are an emergency response to a housing crisis and by themselves do not resolve that housing crisis. Emergency shelters "should support *flow* from a housing crisis to housing stability,"¹⁴-so it is crucial to ensure that shelters have throughput into permanent housing. This means there must be permanent housing options into which people can be placed. Addressing flow into and out of shelter is critical to creating and maintaining an effective housing crisis response system.

The counties are working right now to bring new year-round and seasonal shelter beds online using SHS measure funding – including 565 new year-round beds by summer 2022. In addition to this, County partners will bring on hundreds more shelter beds using other funding sources. This regional shelter capacity expansion includes congregate shelter, non-congregate and alternative shelter options. Our region has yet to benefit from the impacts of this expansion. Any additional capacity increases would need to consider this impact as well as the planned shelter system improvements and overall housing-focused investments the counties have committed to in their LIPs, which will help prevent shelter demand and increase shelter outflow into permanent housing.

In their LIPs, each county committed to enhancing shelter operations by placing housing-focused services in shelters, which includes housing navigation and housing placement supports. This, along with increases in rent assistance investments and housing unit production will help increase outflow from shelter starting this year. The region expects to see an expansion of approximately 2,400 permanent housing opportunities by summer 2022.

To reduce shelter demand, counties have committed to expanding outreach teams with both behavioral health and housing-focused supports to address immediate needs and house people directly from wherever they are staying. Counties are also investing in rent assistance, supports and services to prevent people from falling into homelessness and from needing to access shelter.

Finally, lacking comprehensive data and the analysis capacity to draw conclusions from it, there are still unknowns at the regional level regarding shelter inflow, on the ways current shelter does or does not have throughput (and why), and a lack of information about the unique housing barriers and challenges for various populations of people who are living unsheltered. Homeless systems have historically been severely underfunded with respect to data collection, maintaining data quality, data analysis and evaluation. The good news is that regional SHS measure funding will transform data and evaluation capabilities by investing in the staff, tools and technical assistance that have been desperately needed for years.

¹³ United States Interagency Council on Homelessness. "<u>Key Considerations for Implementing Emergency Shelter Within an</u> <u>Effective Crisis Response System</u>."

¹⁴ United States Interagency Council on Homelessness. "<u>Key Considerations for Implementing Emergency Shelter Within an</u> <u>Effective Crisis Response System</u>."

Staff Recommendation

This report provides the data requested by Metro Council regarding regional shelter capacity, homeless population estimates and Metro-owned sites that could be considered for use as shelter and/or housing. This is a preliminary report. For the reasons noted earlier in this memo, these are not sufficient data sources to determine whether and by how much temporary or permanent shelter capacity should be expanded, and whether Metro sites are feasible for the shelter models best suited to each jurisdiction. Staff recommends that Council work with the departments managing the sites to further explore feasibility

County partners are in the process of bringing hundreds of new shelter beds into operation by this winter. Although planning and implementation is moving quickly, counties have experienced community opposition to siting some of the shelters set to be built out this year. Metro Council could help provide support to bring these shelters online and/or consider providing Metro sites across the region (in addition to the Convention Center and possibly the Expo Center) for shelter and/or housing use. More in-depth analysis and collaboration with Metro managing departments and county partners, including services providers, would be needed to accomplish this.

Gaining a better understanding of shelter inflow and outflow will be possible with the data capacity investments the county partners are making this year, including monthly by-name data thanks to technical assistance from the Community Solutions Built for Zero program. Better outflow into permanent housing will be realized this year with additional housing services in shelter and the expansion of permanent housing programs that county partners will launch in the coming months. Staff recommends ongoing analysis through the metrics work charged to the Tr-County Planning Body.

The LIPs provide the pathways to address both the short and long-term needs of people experiencing unsheltered and chronic homelessness, including expanding the amount and types of shelter our region is able to provide. This work is happening right now and we are excited for this year's unprecedented expansion of resources that will support housing stability for thousands of people experiencing homelessness.

Metro staff is grateful for Metro Council's sense of urgency and attention to the issue of unsheltered and chronic homelessness. No household should be forced to live in, according to that household's standards, unsafe and inhumane conditions. Connecting these households back to permanent housing will provide the most safe, secure, humane and long-term option.

BEFORE THE METRO COUNCIL

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FOR THE PURPOSE OF DIRECTING THE CHIEF OPERATING OFFICER TO DEVELOP AND COORDINATE ANALYSIS AND ASSESSMENT OF SUPPORTIVE HOUSING SERVICES STRATEGIES AND PROGRAMS TO EVALUATE ONGOING REGIONAL NEED. RESOLUTION NO. 21-5187A Introduced by Councilor Mary Nolan, Councilor Bob Stacey and Councilor Juan Carlos Gonzalez

WHEREAS, under the Supportive Housing Services Program approved by voters and framed by Metro, Clackamas, Multnomah and Washington Counties have developed Local Implementation Plans (LIPs) which dedicate funds to a variety of services with the end goal of ending chronic homelessness; and

WHEREAS, while conventional shelter itself does not end chronic homelessness, it is a key component that all three counties included in their LIPs to address immediate, short-term safety needs for those experiencing homelessness; and

WHEREAS, while the counties work to ramp up all parts of their strategies, Metro Council wishes to provide specific guidance to Metro staff for FY 21-22; now, therefore,

BE IT RESOLVED, that Metro Council directs the Chief Operating Officer to provide by September 1st, 2021, a report to Metro Council and a presentation for discussion at a Council work session covering information that includes at least:

- a. An inventory of Metro properties that could be made available to counties, cities, social service organizations and other non-profit entities for the purpose of hosting additional temporary warm and dry, clean and secure sleeping options (or shelter); and
- A compilation of existing and planned capacity for warm and dry, clean and secure sleeping (shelter) within the Metro Service District owned or operated by Clackamas, Multnomah, and Washington Counties, cities within those counties and non-government organizations planned to be available by December 1, 2021. Temporary winter shelter capacity should be included in this memorandum. Metro staff will provide quarterly written reports to Council with updated shelter capacity across the region, which will be discussed at Council work sessions; and
- c. An estimate based on the most current, complete and accurate information available of the number of people likely to have no warm and dry, clean and secure sleeping options for the 2021-22 winter. This number will come to Metro Council along with the most recent data and analysis of the total number of homeless individuals (both by the U.S. Department of Housing and Urban Development definition and other government metrics) within the Metro region

BE IT FURTHER RESOLVED, Metro Council directs the Chief Operating Officer to continue coordinating with Clackamas, Multnomah, and Washington Counties to conduct ongoing performance analysis and gap assessments of the totality (or summation) of Local Implementation

Plan program strategies in the context of the collective regional need. Metro staff will provide quarterly written reports to Metro Council with updated analysis thus providing the Metro Council an opportunity to collaborate with regional partners to address identified system barriers and issues.

BE IT FURTHER RESOLVED, Metro Council directs the Chief Operating Officer to engage national experts and leaders in the transition from homelessness to permanent housing to advise Council on the effectiveness and potential adaptability of approaches used successfully in other regions and cities to move equitably and expeditiously to permanent housing while stabilizing the health, wellbeing and dignity of all homeless neighbors until they too achieve permanent housing.

BE IT FURTHER RESOLVED, Metro Council will host annually, beginning in November 2021, a public conversation and round table, either independently or with the tri-county homeless services planning body, that will include regional elected leaders, service providers, community groups made up of and serving BIPOC communities, representatives of workers, representatives of businesses, school districts, the faith community and the general public to assess the state of shelter and emergency shelter and make plans for improving regional outcomes.

ADOPTED by the Metro Council this 17th day of June, 2021

Approved as to Form:

Carrie Macharen

Carrie MacLaren, Metro Attorney

Lynn &

Lynn Peterson, Council President

BEFORE THE METRO COUNCIL

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ADOPTED by the Metro Council this 17th day of June, 2021

Approved as to Form:

Carrie MacLaren, Metro Attorney

Lynn Peterson, Council President

MEMORANDUM

DATE: June 8, 2021

TO: Metro Council and Policy Advisors

FROM: Patricia Rojas. Regional Housing Director

RE: Supportive Housing Services Budget Note

Summary

The Metro Housing team has reviewed a Supportive Housing Services Winter Safety Budget Note that proposes to deviate from the current Supportive Housing Services strategy to implement an alternative Mass Temporary Housing Strategy by December 1, 2021. The information below identifies the financial impact and implementation challenges with this proposal for consideration.

Background

Earlier this spring, the Metro Council approved two of the three required Local Implementation Plans (LIPs) for the work set to begin July 1, 2021 on the voter-approved regional supportive housing measure. This measure, as approved by the voters, creates a pathway for our region to address the emergent life and safety needs of thousands of individuals while simultaneously creating a pathway out of homelessness and into housing. Thanks to the Supportive Housing Measure and county leveraged funds, the region can expect to see the following increases in services above and beyond pre-COVID levels. Below are key facts and figures of the current strategies and the proposed budget note strategy:

Current Supportive Housing Strategy (Year One Projections)

- $\Rightarrow~$ 1100-1500 bed increase in shelter capacity from pre-COVID capacity levels
 - \circ 700 new shelter beds will be added with SHS funding
- ⇒ Congregate shelter capacity add back as vaccine rates increase (lost due to physical distancing requirements)
- \Rightarrow 1500 *Population A households will be placed into permanent supportive housing
- ⇒ 3,000 individuals/households could be served between additional shelter capacity and placement into permanent supportive housing (already contained in LIP adopted strategies)
- ⇒ LIP strategies include behavioral health and other social services, street outreach, permanent housing services, long term rent assistance and eviction prevention services
- \Rightarrow 100 people who go from shelter to housing = 100 open beds for those who need it
- ⇒ Multnomah County already provides no turn away shelter to any person experiencing homelessness during the severe winter weather events. (see: Multnomah County's severe weather "no-turn-away" policy).

The proposed budget note would replace the LIP outcomes above with a focused outcome of 5000 shelter beds by December 21. Additionally, as proposed, it would direct at least 80% of the available financial resources and a significant level of organizational, and human resources away from the approved LIP outcomes to focus solely on this outcome.

Proposed Mass Shelter Strategy Assumptions

- \Rightarrow *\$24,000,000-average annual cost per non-congregate shelter bed
- ⇒ \$120,000,000 annual estimated cost = 80% of total SHS projected implementation budget

Does not include any funds for health and social services, permanent housing services or rent assistance.

Budget Note Implementation Considerations

- \Rightarrow Projected allocation to counties in FY22 is \$151,000,000
- ⇒ SHS Work Plan and Metro Code include defined structures, processes, roles and responsibilities for SHS program implementation
- \Rightarrow Implementation of the budget note would require amendments of Metro Code and Work plans
- ⇒ Requires halting of already approved Local Implementation Plans and implementation
- ⇒ People in shelter are still homeless and require services and therefore new sources of funding to end their homelessness would be required
- ⇒ \$100,000,000 per year total cost to end homelessness using permanent supportive housing for 5000 households
 - \$20,000 per year per household costs to move someone out of homelessness and into permanent supportive housing
- \Rightarrow Major realignment of funding and allocations
 - Counties and non-profit partners would have to abandon current programming and implementation of the approved LIPs to free up the capacity required for opening 5000 shelter beds by December 1st.
 - Metro, County partners and non-profit organizations do not have the capacity to continue current operations, implement LIP's and open shelter for 5000 individuals by Dec. 1.
- \Rightarrow Development of new shelter sites to reach capacity of 5000 individuals
 - Time constraint in negotiation of site contracts or purchase agreements, retrofit the site, contract a shelter operator and adequately staff shelter sites
 - Site permitting, legal requirements, and political challenges
 - Major realignment of County resources toward shelter operations
- \Rightarrow Utilization
 - Because of the voluntary nature of homeless services, the additional shelter capacity would not guarantee an end to unsheltered homelessness
 - Using this approach in an attempt to end street camping would require meeting the standards set in Martin v. Boise and administrative agreements for law enforcement to trespass people experiencing homelessness from public property

Equity Considerations: (including but not limited to)

 Equitable process: The measure and now the SHS Work Plan and Metro code require that implementation strategies be identified and approved through a Local Implementation Plan process. Plans must be informed by robust community engagement that centers race as well as lived experience of homelessness. The current budget note proposal does not meet this requirement.

- Funding allocation: The measure, SHS Work Plan and Metro code require that 25% of funds be allocated to population B - households experiencing homelessness or at high risk of homelessness. This population includes a higher rate of BIPOC community members. If funds are diverted to a shelter first strategy this population will have little to no access to SHS programming.
- Community Trust: Keeping our promises to the community about how we steward this program and the funds will be important in fostering community trust in Metro.

Staff Recommendation

The SHS budget note is inconsistent with the SHS Work Plan, Metro code and the intent of the measure as passed by the voters, is financially unsustainable, will deplete community resources required for existing programming, will halt the implementation of the LIP's and a July 1 roll out date and undermine the input of the community, including those with lived experience and BIPOC community members who have informed the strategies outlined in the Local Implementation Plans. To be consistent with the intent of the voters, the equitable process and systems underlying the measure and the Local Implementation Plans, Metro staff strongly recommends proceeding with the program as designed and approved by Metro and our key implementation partners. We believe that the outcomes described by the counties will demonstrate a meaningful and long-term impact on addressing the wide range of needs of people experiencing homelessness.

*Service increases in year one are projects over pre-COVID baseline numbers.

* Population A is defined as: Individuals who have one or more disabling conditions; AND are at imminent risk of experiencing long-term or frequent episodes of literal homelessness AND have extremely low income

* Population B id defined as: Experiencing homelessness OR have a substantial risk of experiencing homelessness

* Cost of shelter is based on the shelter costs in Multnomah County for non-congregate models. Cost will vary by county and model. Projected cost does not include adding new congregate sites in FY22 due to COVID-19 health and safety constraints. Includes one time start-up costs amortized over the life of the project

Governance, Costs, and Revenue Raising to Address and Prevent Homelessness in the Portland Tri-County Region



A report by the Portland State University Homelessness Research & Action Collaborative, & Northwest Economic Research Center

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Citation: Zapata MA,* Liu J,** Everett L, Hulseman P, Potiowsky T, & Willingham E. 2019. *Governance, Costs, and Revenue Raising to Address and Prevent Homelessness in the Portland Tri-County Region.* Portland State University

*First author & **second author. All other authors listed in alphabetical order.

For questions, please contact: Marisa A. Zapata (mazapata@pdx.edu)

Acknowledgements

We met with, received data from, and sought or received comment from the organizations listed below. While a range of partners were given the opportunity to provide feedback on the report, we asked some to review parts versus all of the document and some to offer feedback throughout the process versus reviewing a final draft. Some partners were asked specific questions, or asked for data sets only. In all instances, we made the final determination of how to proceed. Their listing below should not be interpreted as an endorsement. To protect confidentiality of all who shared thoughts with us, we do not list individual names associated with organizations, unless they are not with an organization or submitted comment as an individual person within an organization:

Central City Concern	Metro Regional Government	
City of Portland	Multnomah County	
Clackamas County	Oregon Center for Public Policy	
The Corporation for Supportive Housing	REACH CDC	
ECONorthwest	State of Oregon	
Here Together	Washington County	
Home Forward	Welcome Home	
JOIN	Wheelhouse Associates	
Joint Office of Homeless Services	Transition Projects, Inc.	

In addition to the above organizations, we would like to thank Robert Stoll for sharing this project idea with us. Mr. Stoll's support throughout this project has been greatly appreciated.

Special thanks to the additional PSU team members who worked on this report: Stefanie Knowlton, Andrew Hickey, Jennifer Lee-Anderson, Jacen Greene and all of the Summer Research Institute graduate students.

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Portland State University

FOREWORD

This report takes a comprehensive look at the scale of homelessness and housing insecurity experienced in the Portland tri-county area. Our goal in producing this report is to help community members understand the scope and scale of the challenges we face when addressing homelessness and housing insecurity. We examine governance options, provide cost estimates for providing housing, supports, and services, and present revenue-raising options for our local governments to address homelessness and housing insecurity.

Before getting too far into the report, we want to make sure to note a few things. Many of the available counts of those experiencing homelessness use a narrow definition. We believe this leaves people behind. For example, the official Point-in-Time counts do not include those living doubled up, those sometimes described as the hidden homeless or precariously housed. This vulnerable population is sleeping on friends' couches or cramming in unsafe numbers into bedrooms. Because homelessness is experienced differently within communities of color, a narrow definition of who has experienced homelessness leaves people of color out. Larger estimates like we have conducted in this report will help better achieve racial equity and give a more complete picture overall.

Because these figures are comprehensive and include multiple jurisdictions, some might be shocked by the homelessness count and the cost. These numbers are on a scale that we are not used to seeing when talking about homelessness in the Portland region. Here are a few considerations to put the numbers in perspective. The overall count of people experiencing homelessness is about 2% of the population, many of whom are already receiving some type of services. Who is receiving what types of services and at what level is beyond the scope of this report; however, we know that some of the necessary investments have already been made, and will continue to be made. For example, the estimates do not account for the impact of the 2018 Metro and 2016 Portland affordable housing bonds, which total approximately \$911 million combined.

When turning to the costs for homelessness prevention and housing insecurity, we assume that the costs we estimate for people experiencing homelessness are spent and the interventions are successful, and that the planned rent assistance for prevention would happen immediately. Obviously, this would not happen in practice. The type of modeling needed to capture the inflow and outflow of people experiencing homelessness is complex, data intensive, and time consuming.

We opted to go in the opposite direction, and created replicable, straightforward estimates completed in just a few months. Our goal was to provide a general sense of the number of households and associated costs, and we believe that adding layers of complexity where assumptions are added to assumptions would not get us to a better estimate. These estimates for the costs and revenue-raising options are ballpark figures based on counts, data, and

assumptions from currently available sources. They are not meant to be exact, and should only be used as guideposts. The numbers provide a starting point for conversations on the resources necessary to tackle this issue in the tri-county area, and how we might go about raising the revenue to do so. Similarly, the governance section provides case descriptions about regional governance for homelessness in other areas, and considers options for the tri-county region. We urge the tri-county region to collectively decide how to move forward, and to define the problem we are trying to solve—homelessness or housing? Supporting people experiencing homelessness who are unsheltered will not solve affordable housing, and affordable housing is integral to helping them. However, without weighing trade-offs, we cannot know for sure exactly which is the best path to addressing affordable housing.

Lastly, we know that governance, costs, and revenue are just the beginning of the work we must undertake in our community to provide a safe, quality, affordable home with supportive services to every community member in need. At the PSU Homelessness Research & Action Collaborative, we look forward to understanding the policies that have given rise to and perpetuate homelessness. We know that only through long-term strategic planning and structural improvements can we both resolve homelessness for people today, and ensure it does not continue to happen in the future. We hope you find this report helpful, and we look forward to discussing with you how we can best address homelessness in our region.

Marin t. Zapak

Marisa A. Zapata, PhD

INTRODUCTION/EXECUTIVE SUMMARY

In the Portland, Oregon metropolitan region, homelessness has become increasingly visible on our streets and in our media headlines. Conflicting rates of who is experiencing homelessness, differing definitions of who is at risk, and varying cost estimates to help those without a stable place to live leave community members confused about the scale and scope of the challenge that we face. Our overarching goal in this report is to provide information that helps the public better deliberate about how to support people experiencing homelessness, and to prevent future homelessness. We thread together three areas of work—governance, costs, and revenue—to help the region discuss how to collectively move forward.

We start with a discussion about governance for a regional approach to address homelessness. We then offer two sets of conceptual cost estimates. These ballpark figures are meant to help the community understand the number of people experiencing homelessness and facing housing insecurity. Lastly, we examine a range of revenue-raising options for the tri-county region to give communities an idea of how to find resources to address and prevent homelessness. In all three sections our goal is to paint a picture with a broad brush of the landscape in which we are operating.

Key Takeaways

We present core findings from each of three substantive sections in the report.

- Regional governance can play an effective and important role in addressing homelessness and increasing capacity to improve the lives of people experiencing homelessness or housing insecurity. Solving homelessness requires affordable housing, and housing markets to operate regionally. Service needs do not follow jurisdictional boundaries, and coordinating regionally can reduce inefficiencies and allow for cost sharing.
- Political advocacy matters for raising awareness about an issue while also informing, influencing, and building power among multiple stakeholders. These stakeholders include people experiencing homelessness, elected officials, government actors, businesses, service providers, advocates, people experiencing housing insecurity, and other community members.
- Multi-stakeholder processes can help build power across groups and create advocacy networks and coalitions. Multiple groups operating in government or civic society can help create broader commitments to work toward a common goal, in this case addressing homelessness.

- Some of the most successful governance groups included in this report focused on homelessness centered on racial equity. Poverty and race are inextricably linked, and communities of color face disproportionate rates of homelessness. In the four cases we describe, Black community members consistently experienced disproportionately higher rates of homelessness.
- 38,000 people experienced homelessness in the tri-county area in 2017. This estimate is based on annualized Point-in-Time data, numbers served in each county, and K-12 homelessness reports. Communities of color, specifically Black and Native American communities, are represented at disproportionately higher rates in the homelessness population when compared to their total population in the region.1
- The cost to house and support this population ranges from \$2.6 billion to \$4.1 billion over ten years based on a range of options presented in the cost section of this report. The costs include the development and/or acquisition of new units. These estimates assume these populations remained static, with no new additional homeless households. These figures do not account for the impact of Metro and Portland bonds totaling approximately \$911 million for affordable housing, or ongoing service-level funding.
- Services, rent assistance for privately leased units, building operations for publicly developed units, and program administration would cost about \$592 million-\$925 million in 2025,² when costs are at their highest, and an average of \$97 million-\$164 million per year thereafter.³ These figures do not include the costs for building or acquiring units, and vary by scenario. These numbers also include non-permanent supportive housing (non-PSH) households receiving 100% rent support and moderate services for two years. In all

¹ The focus on Black and Native American populations reflects that more and better data were available and should not be an indication that other communities do not face serious disparities. For example, in the case of Latino communities, fears about immigration status means limited requests for help. Asian Pacific Islander communities have significantly different demographic profiles based on which subpopulation to which they belong. Also note that systemic and persistent data collection issues results in undercounts in many communities of color. See Runes, C. (2019). *Following a long history, the 2020 Census risks undercounting the Black population.* Urban Institute. Retrieved from https://www.urban.org/urban-wire/following-long-history-2020-census-risks-undercounting-blackpopulation)

² We assumed programming would begin in 2024. We selected 2025 as it included completion of unit acquisition/development.

³ Cost variance is due to the proportion of units that are publicly developed (versus acquired and leased on the private market). The top end of the range represents the scenario in which higher service costs are assumed and local public entities construct all permanent supportive housing units, while the lower end of the range includes lower service cost assumptions, and increases the number of units rented through private leases. These numbers also include non-PSH households receiving 100% rent support and more moderate services. Should the non-PSH homeless households become fully self-sufficient, service and operation costs drop to \$97 million - \$164 million per year. In all likelihood many non-PSH homeless households will achieve some level of self-sufficiency but may continue to need some level of support; this report does not calculate those expense estimates.

likelihood many non-PSH homeless households will achieve some level of self-sufficiency, but may continue to need some level of support after two years. Should all non-PSH homeless households continue to receive 100% rent assistance and services, our highend estimates for every additional two years that non-PSH households receive full rent subsidies and services totals \$1.6 billion. Again, these numbers do not include current funding commitments.

- As many as 107,000 households faced housing insecurity or were at risk of homelessness in 2017 in the tri-county area due to low incomes and paying more than 30% of their income on housing costs, commonly described as housing cost burdened. This number includes households that made 0–80% of median family income (MFI), and paid more than 30% of their income on housing costs. About 83,000 households from the same income brackets paid more than 50% of their income on housing costs in 2017. Focusing on the lowest wage earners (0–30%), about 52,000 households paid more than 30% of their income on housing costs.
- Communities of color face much higher rates of rent burden, and lower median income when compared to White counterparts. The median salary for Black households in the Portland area is half that of the overall median—a significant disparity, and a sign of the current and historic systemic racism faced by this population in the region.
- Providing rent assistance for all of these households would help resolve housing insecurity and reduce the risk of becoming homeless. We estimated costs to create such a program, using a range of rents and addressing households that earn 0–80% of the median family income (MFI) for their household size. To help severely cost-burdened households over ten years would cost \$8.7 billion–\$16.6 billion. That's about \$870 million–\$1.66 billion per year, or \$10,000–\$20,000 per household per year. These numbers do not account for what is already being spent in the tri-county area to relieve the cost burden for households in need.
- There are a range of revenue options that the tri-county region could explore collectively, through Metro, or at individual jurisdictional levels. All have trade-offs; all should be carefully examined for equity and regressivity, with particular attention to the impacts on communities of color and low-income communities.

Key Recommendations

These recommendations were developed by working through available data sets, interviewing people from other communities, reviewing literature, and professional practice here in Portland.

• We recommend the tri-county area form an exploratory committee or task force of an inclusive and committed set of stakeholders that is led by a government entity, or set of government entities, to examine in which ways better regional planning, policies, and

program coordination around homelessness could help all jurisdictions meet their goals. This task force would do the following:

- Deliberatively identify the "problem" to be solved. Two examples of how to frame the problem: 1) Focusing on unsheltered homelessness; or, 2) Creating safe, quality, and affordable housing for all community members. Clarity about which problem(s) we are attempting to solve is essential to the success of any effort. We recommend the region carefully consider if we are trying to "solve" homelessness, or if we are trying to "solve" affordable housing. We argue for the second framing, focusing on affordable housing. The second framing could include the first identified problem framing. *Supporting people experiencing homelessness who are unsheltered will not solve affordable housing, and affordable housing is integral to helping them. However, without weighing trade-offs, we cannot know for sure exactly which is the best path to addressing affordable housing.*
- Include decisions and discussions about program and service coordination, policy making and implementation, and revenue raising and distribution.
- Build on existing collaborative efforts, but not usurp them, and hold processes in an inclusive and equitable manner where equity refers to communities of color and people who have or are experiencing homelessness or housing insecurity. Transparency will be central to ensuring democratic governance as well as public support. Encourage processes occurring in civic society to continue their work independently.
- Have an identified decision-making date where the group will make formal recommendations about how the region should move forward.
- Define the homelessness community to include people who are doubled up. This is a substantial population that cannot be easily dismissed.
- Center the process on racial equity. The racial disparities for communities of color experiencing homelessness or housing insecurity do not exist by accident, and the only way to really address and prevent homelessness will be to focus on their needs. By focusing on achieving racial equity, other racial groups that do not experience disparities will also be served.
- Given the conceptual nature of the population and cost estimates in this report, we encourage identifying key areas where additional, more concrete estimating may be appropriate. We caution against spending significant resources on complicated and indepth dynamic modeling and cost estimates unless their utility is clear. Much of the data and estimates related to homelessness can be problematic, and intensive drill downs may not make cost estimates more reliable.
- Use the information from this report to help map strategic next steps. We encourage stakeholders to break down pieces from the cost studies and think about manageable ways to go about addressing different parts of the issues. For instance, Metro and the City

of Portland have bonds that are projected to produce more affordable housing units. A corresponding revenue-raising mechanism for operating costs and services for those units may be an appropriate next step, and the tables in the costs section of the report include the figures to make such an estimate.

 A racial equity decision-making tool should be created and used when making decisions about how to analyze data, estimate costs, and raise revenue.⁴ We were unable to estimate additional costs to support the specific needs of communities of color; however, based on preliminary analysis providing appropriate and effective services for communities of color would not significantly raise the final cost estimates provided here. Any programming should include funding to support work that achieves racial equity.

In the rest of this section, we provide some basic definitions that you will encounter in the report and research methodology. Additional definitions are found throughout the report, and in the glossary. Each section has more detailed methodological notes as research methods varied based on topic. We conclude this section with a summary, including summary tables about costs and revenue, of each of the three substantive sections after the terminology primer.

Terminology

Homelessness has been created by a series of interconnected systems, but is fundamentally about a lack of affordable housing. This report focuses on the costs over ten years to provide housing and relevant services to those experiencing homelessness while also working to prevent additional homelessness and deep housing insecurity. However, to fully address and prevent homelessness, our community will need to consider more significant and robust policy change. This report helps readers more fully imagine how the Portland region can continue its work to address homelessness while also understanding costs and possible revenue options for housing and relevant support services. In this first section of the report, we introduce definitions, data, and concepts related to homelessness. Then we provide summaries of the other sections of the report.

Key Definitions

There are many definitions of homelessness, housing insecurity, supportive services, and other terms you encounter when reading about homelessness. We include a brief primer on the

⁴ A Racial equity lens has been adopted by Metro, Multnomah County, the city of Portland, and Meyer Memorial Trust. In short, a racial equity lens provides a series of questions to research and consider on policies and programs to identify their disparate impacts on communities of color. See Dr. Zapata's Creating an Equity Lens at Institutions for Higher Education for an overview about lenses and examples on how to apply one (2017. Working Paper. Portland State University. https://works.bepress.com/marisazapata/10/).

differences between some of these core terms, focusing on how we employ them in this report. You will find plenty of references to read more, and recommendations to other glossaries. Always remember that how a given government entity defines a term is how they determine who is eligible for the programmatic services they administer.

Homelessness

Despite considerable recent attention to homelessness, no one definition of homelessness unites the work. The McKinney-Vento Homeless Assistance Act is the source of funding for all homeless services across all of the federal agencies. Each federal agency creates their own definition through their own regulatory process.

The Department of Housing and Urban Development (HUD) controls a significant portion of the federal funding for homelessness, and their definition focuses on people living unsheltered, in emergency shelter, and transitional housing. The HUD definition for homelessness does not include people living doubled up with other people.

The Department of Education (DOE) does include school-aged children and youth, unaccompanied or with their families, who are sharing other peoples' housing (commonly referred to as doubled up) in their definition of homelessness. This definition does not include adults without school-aged children who are doubled.

The multi-jurisdictional governance structure within Multnomah County that addresses homelessness, A Home for Everyone, adopted a local definition of homelessness allowing people who are unsafely doubled up to qualify for local homelessness funds.

Note that regardless of how any local or state government defines homelessness, the relevant federal definition determines who can access federal funds.

For this study, we defined homelessness as an individual or household who lacks a fixed, regular, and adequate nighttime residence including people sharing someone else's housing because of economic or other hardships. This definition expands who is "counted" as homeless, and leads to a number considerably larger than the HUD homeless Point-in-Time count figures. However, because of how the federal government defines homelessness dictates who is counted as homeless, we are only able to create estimates for people who are counted in HUD and DOE data sources. This means we do not have the ability to count those who are doubled-up adults without children in our calculations.

At risk of homelessness

Identifying who is at risk of homelessness can again reference a broader definition, or a much more narrow definition. HUD provides detailed criteria across three categories to determine who is at risk of homelessness, starting with those making 30% or below of median family income

(MFI) in the area.⁵ In their reports, ECONorthwest defined being at risk of homelessness that started with 50% of MFI and at least 50% housing cost burdened, following the definition of "worst-case housing needs" from HUD.⁶

We reviewed academic literature, held discussions with community partners, examined the significant increases in housing values in the region, and decided to include more households in our analysis. Because the literature demonstrates that evictions are a significant cause for homelessness, and not having enough money to pay for rent is a leading cause for eviction, we start our analysis of how many people need assistance by identifying people who are cost or rent burdened, meaning they pay more than 30% of their income for housing costs.⁷ Because some making over the median family income may be cost burdened, but still able to afford basic necessities, we examined who is housing cost burdened and making less than 80% of median family income. While not all of these households are at risk of homelessness, they are most likely housing insecure, and for the purposes of our analyses it does not matter for estimating costs. Further, as discussed below, housing insecurity results in significant negative life outcomes. We break down the analysis in a way that allows readers to create more restrictive definitions and calculate their own related population sizes and costs.

Housing insecurity and housing instability

Similarly to "homeless," housing instability or insecurity can refer to a range of household situations. In the American Housing Survey (AHS), a joint venture between HUD and the US Census Bureau, housing insecurity "encompasses several dimensions of housing problems people may experience, including affordability, safety, quality, insecurity, and loss of housing".⁸ Housing insecurity and instability play significant roles in life-time learning, earnings, and health outcomes.

Because a more detailed analysis of who is housing insecure was beyond the scope of this report, we use housing insecurity to mean those households between 0–80% of area median income (AMI) paying more than 30% of their income to housing costs. We break down the analysis in a way that allows readers to create more restrictive definitions and calculate their own related population sizes and costs. We use housing insecurity and instability as synonyms.

https://www.hudexchange.info/resource/1975/criteria-for-definition-of-at-risk-of-homelessness/

https://www.huduser.gov/portal/sites/default/files/pdf/Worst-Case-Housing-Needs.pdf.

⁷Collinson, R. & Reed, D. (2018). *The effects of evictions on low income households* [PDF file]. Retrieved from <u>https://www.law.nyu.edu/sites/default/files/upload_documents/evictions_collinson_reed.pdf</u> and Desmond, M. & Gershenson, C. (2016). Who gets evicted? Assessing individual, neighborhood, and network factors. *Social Science Research, 62*, 362-377.

8 U.S. Department of Housing and Urban Development [HUD]. (n.d.). *Measuring housing insecurity in the American Housing Survey*. Retrieved from https://www.huduser.gov/portal/pdredge/pdr-edge-frm-asst-sec-111918.html

⁵ To see the additional criteria, see U.S. Department of Housing and Urban Development. (2012). Criteria for definition of at risk of homelessness [web page]. Retrieved from

⁶ Watson, N. E., Steffen, B. L., Martin, M., & Vandenbroucke, D.A. (2017). *Worst case housing needs: Report to Congress 2017* [PDF file]. Retrieved from

Median income

Median income identifies the point where 50% of people make over that amount and 50% make less than that amount. Median income can be calculated for different groupings of people such as different geographies, family size, household size, race, etc. In this report, we use median family income (MFI) in our calculations. Determining who is described as low-income depends on what part of the income spectrum a family falls. If you make less than 80% MFI, you would be considered low- or moderate-income. HUD uses US Census Bureau data to calculate their own median incomes. Their definition is based on family income.9

Housing cost or rent burdened

According to HUD, "Families who pay more than 30% of their income for housing are considered to be cost burdened and may have difficulty affording necessities such as food, clothing, transportation and medical care."₁₀ In addition to rent or mortgage payments, housing cost burden includes housing costs such as insurance and utilities. Families paying more than 50% of their income on housing costs are classified as severely cost burdened. Housing costs are considered things like rent or mortgage, utilities, and renter's or homeowner's insurance. Housing cost and rent burden are often treated as synonyms.

Doubled Up

Families or individuals who live doubled up with friends or family members due to the loss of housing or economic hardship are considered homeless. Sometimes described as the hidden homeless, this population is not counted in Point-in-Time but is included in Department of Education counts for unaccompanied youth or youth in families. Neither count includes doubled-up adult households. Doubled up can refer to a range of complex living arrangements.

Chronic homelessness

HUD defines chronic homelessness as "an unaccompanied homeless individual with a disabling condition who has either been continuously homeless for a year or has had at least four episodes of homelessness in the past three years."¹¹ Most likely, people who are chronically homeless are the people you see on the streets.

9 See U.S. Department of Housing and Urban Development [HUD]. (2019). Estimated median family incomes for Fiscal Year (FY) 2019 [PDF file]. Retrieved from

https://www.huduser.gov/portal/datasets/il/il19/Medians2019r.pdf.

10 See U.S. Department of Housing and Urban Development [HUD]. (n.d.). Affordable housing. Retrieved from https://www.hud.gov/program_offices/comm_planning/affordablehousing/.

11 National Low Income Housing Coalition [NLIHC]. (2019). HUD publishes final rule on definition of "chronic homelessness". Retrieved from https://nlihc.org/resource/hud-publishes-final-rule-definitionchronic-homelessness

Unsheltered Homeless

HUD defines unsheltered homeless as people experiencing homelessness "who sleep in places not meant for human habitation (for example, streets, parks, abandoned buildings, and subway tunnels) and who may also use shelters on an intermittent basis."₁₂

Permanent Supportive Housing

HUD defines permanent supportive housing as permanent housing with indefinite leasing or rental assistance paired with supportive services to assist homeless persons with a disability or families with an adult or child member with a disability achieve housing stability.13

Point-in-Time Count

"The Point-in-Time Count provides a count of sheltered and unsheltered homeless persons on a single night during the last ten days in January"¹⁴ that must be completed every two years by jurisdictions over a single night to avoid double counting. The guidelines for conducting the PIT Count differentiate between sheltered and unsheltered individuals, and require basic demographic breakdowns. The PIT Count is a snapshot at a single point in time, and has several well-documented flaws.¹⁵

Affordable Housing

Affordable housing can refer to a wide range of housing types and pathways to housing. In this report, we define housing as affordable when households pay less than 30% of their income on housing costs. Affordable housing may be developed and owned by the government, subsidized by the government and built by a private developer, or obtained through rent assistance to lease units on the private market. Some buildings might have a mix of market rate units and other units that are designated for specific moderate to lower income groups. Other affordable housing is "naturally occurring," meaning it is affordable to people with lower incomes without any type of intervention. Our focus is on whether community members can attain safe and quality housing based on their income at a level that promotes housing stability, and not on a particular type of affordable housing or unit type.

12 U.S. Department of Housing and Urban Development [HUD]. (2008). A guide to counting unsheltered homeless people [PDF file]. Retrieved from

https://files.hudexchange.info/resources/documents/counting_unsheltered.pdf

13 U.S. Department of Housing and Urban Development [HUD]. (2019). *Continuum of Care (CoC)* program eligibility requirements. Retrieved from https://www.hudexchange.info/programs/coc/coc-program-eligibility-requirements/

14 U.S. Department of Housing and Urban Development [HUD]. (2019). *CoC homeless populations and subpopulations reports*. Retrieved from https://www.hudexchange.info/programs/coc/coc-homeless-populations-and-subpopulations-reports/

15 National Law Center on Homelessness and Poverty. (2017). *Don't count on it: How the HUD Point-in-Time Count underestimates the homelessness crisis in America* [PDF file]. Retrieved from https://nlchp.org/wp-content/uploads/2018/10/HUD-PIT-report2017.pdf

Racial Equity

Because of the legacies of structural, institutional, and interpersonal racism, many communities of color experience significantly disproportionate rates of negative community indicators such as lower educational attainment rates, median incomes, and employment rates. Using a racial equity lens when analyzing policies and programs helps decision makers identify how to create effective and appropriate programming to surface disparate impacts to these communities, reveal unintended consequences, and identify opportunities to redress inequities. The ultimate goal of discussions about racial equity is to ensure that communities of color do not continue to negatively experience policy-making and programs.

Research Process

This report emerged from discussions with community partners about what the newly created PSU Homelessness Research & Action Collaborative (HRAC) could help contribute in a short period of time to inform public discourse about homelessness. We chose to focus on the Oregon tri-county Portland metropolitan area because the three counties are inextricably linked. We did not extend our analysis across the border to Washington because of the different regulatory contexts. Each section of the report has its own research methodology, and the specific processes and data sources are detailed there. The data sets and cost estimates from which we build in this report posed unique challenges, and we detail challenges and concerns elsewhere.

Findings Summary

Governance

Planning and governing regionally offer important opportunities to create policies and programs to address interconnected and cross-jurisdictional issues. Such efforts can reduce inefficiencies, reduce spatial disparities, and lead to more thriving regions. Planning and governing structures that work at a regional level require investment, politically and fiscally, and can take considerable time to structure justly and effectively. Identifiable leaders in government and civic society are needed to advance solutions for homelessness. They each play instrumental roles in building public support, and in raising revenue for addressing homelessness.

Organizing and advocacy matter. The power of collaborative efforts is realized when they collectively advocate for policy and funding. Collective organizing increases network power, and does not have to fully be subsumed within government-driven processes. Community organizing plays an essential role in successful revenue measures. The best governance structure will not be effective if resources are too scarce to act on identified solutions. However, governance structures linked to or with advocacy agendas embedded could help identify resources and apply pressure to obtain them. In addition, governance that centers on racial equity and builds power with people who have lived experience as homeless fulfills not only democratic goals, but

ensures that governance and resulting plans, policies, and programs serve the communities at the center of the work.

Costs

Based on the available data, we estimate that during 2017 about 38,000 people (or about 24,000 households) experienced homelessness across the three counties. We also estimate that in 2017, up to 107,000 households were experiencing housing insecurity or were at risk of homelessness. Based on ongoing housing market and income trends, we do not anticipate the number to have dramatically decreased.¹⁶ Neither of these counts account for services that households may have already been receiving. We do not want to assume existing service levels go forward in the future, nor that the services being received are adequate. Reporting the possible total of people needing support allows for better planning and preparation for the region.

We calculated two sets of costs. First, we considered what the costs would be to support those 38,000 who experienced homelessness. We estimated how many households would need permanent supportive housing (PSH), and how many would need housing with lighter supportive services (non-PSH). Depending on the scenario selected, we estimate the total costs for 10 years to between \$2.6 billion and \$4.1 billion, or an average of \$107,000 to \$169,000 per household over 10 years (NPV over ten years). Additional findings are summarized below:

¹⁶ ECONorthwest (2018). *Homelessness in the Portland region: A review of trends, causes, and the outlook ahead* [PDF file]. Retrieved from https://m.oregoncf.org/Templates/media/files/publications/homelessness_in_portland_report.pdf.

Table 2.1: Summary of Results for People Experiencing Homelessness in 2017: Housing and
Services ₁₇

Group	Population Size ₁₈	Resources	Costs	
Total population experiencing homelessness (PSH ₁₉ and Non-PSH)	38,263 individuals (or 24,260 households)	Housing construction and acquisition (one-time per unit)	\$190,000-\$218,000 (0-1 bedroon unit) \$190,000-\$338,000 (2-4 bedroon unit)	
		Rent assistance (per year)	\$11,352–\$18,960 (0–1 bedroom) \$14,904–\$41,000 (2–4 bedroom)	
		Rent assistance administration (annual)	\$800 per household	
		System support and employment services (annual)	\$450 per household	
		Administrative costs (annual)	2.4%	
With Permanent Supportive Housing (PSH) Need	5,661 individuals (or 4,936 households)	PSH services (annual)	\$8,800–\$10,000 per household	
Without PSH Need	32,602 individuals (or 19,324 households)	Services (annual)	\$5,700 per household	
Total		 \$2.6 billion– \$4.1 billion, or an average of \$107,000–\$169,000 per household (NPV over ten years) 		

17 All data come from 2017.

18 Where possible, we provide individual and household estimates. Some data are collected on an individual basis, other on the household basis. We use household size estimates from the American Community Survey 2017 5-Year Estimates to convert individuals to households as needed.
19 Permanent Supportive Housing: Approximately 15% of the homeless population is assumed to require permanent supportive housing services, and costs for this group are calculated separately from the costs associated with the 85% that does not require said services.

We then estimated what a universal rent assistance program might cost for all households facing housing insecurity. Depending on which segments of the population are selected for support, costs range from \$8.7 billion_\$21 billion_20 The findings are summarized below and in:

Table 2.2: Summary of Results for Universal Rent Assistance (Homelessness Prevention and
Housing Stability)

Group	Population Size	Resources	Costs	
Cost burdened (spend >30% of income on rent, earn <80% MFI ₂₁)	107,039 households (includes severely cost burdened, below)	ludes severely cost bomolossposs		
Severely cost burdened (spend >50% of income on rent, earn <80% MFI)	82,576 households	Universal housing rent assistance, homelessness prevention programs	\$8.7 billion–\$16.6 billion (NPV, 2024–2033)	

There are some important considerations to keep in mind when reviewing the above tables. The datasets related to homelessness are limited, and as discussed above, driven by how homelessness is defined. Furthermore, conflicting data definitions, incomplete data sets, weak justifications for estimates, and reports with limited to no access to their full methodologies were not uncommon. In other circumstances we might lower our confidence about our work. However, the goal of this report was to create a range of estimates that help frame a regional discussion about the general scope of the work we face in homelessness. Our goal was not to produce the most precise number. Rather, we sought to identify a reasonable estimate or series of estimates to help people make sense of the scale of homelessness.

We provide several sets of options as well as detailed tables to allow for people to identify population sizes and associated costs on their own. Any additional use of these figures should include additional resources to support the specific needs of communities of color. What drives the population estimates and cost estimates is how many people need to be served. If you use the HUD homeless definition, your overall costs would be much less than if you also include doubled-up populations in your homelessness work. The same is true on the housing insecurity and homelessness prevention side of the work. If you focus resources on people making 0–30%

²⁰ See tables in the costs section if you want to calculate serving people experiencing cost burden in an income bracket lower than 0-80%.

²¹ Median Family Income, accounting for family size.

²² Net Present Value: This report often presents program costs in net present value, which estimates the present value of an investment by accounting for the discount rate (10%) and therefore the time value of money; as well as inflation when appropriate. This method most clearly allows sums to be considered comparatively, at the present time. (Note that nominal cash, or cash in the year in which it is used, is often presented as well.)

of MFI versus 0–80% of MFI, you will likely spend less and will serve fewer people. We do not have enough data, nor did we have the time to complete additional analyses that would help inform focusing on one struggling population over another. We also believe that community members and groups should be involved in any decision about whom to serve.

We are also concerned that in policy and program implementation the question of who is most at risk of homelessness or whether doubled-up "counts" as homeless reinforces a pathway where there are highly limited resources given to those identified as most at risk, and others given nothing. People may be living in unsafe housing and thus be housing insecure, but not most likely to become homeless. We do not want to implicitly take a position that one population deserves support while another does not. More inclusive definitions provide us important guideposts for when those types of questions have to be asked.

Revenue

We reviewed 11 revenue-raising options, examined examples, and then estimated what rate or fee would be necessary to reach \$100 million in annual revenue. The findings are summarized in Table 3.1 below:

Tax Policy	Description	Relevant examples Tax Base		Tax Rate/Fee to reach \$100 Million per year	
Corporate Tax	A tax on business profits	Exists in Oregon, Multnomah County, and Portland	Clackamas and Washington County Business Profits	\$91.5 million by expanding Multnomah BIT to Clackamas and Washington	
Business License Tax or Fee	A fee charged per establishment			\$1,755.54	
Gross Receipt Tax	A tax on business revenue	City of Portland and San Francisco	Business Revenue	0.055% (0.056% excluding groceries)	
Sales Tax	A tax on a good or service levied at the point of sale	Does not exist in Oregon, but most other states	Price of Purchased Goods	1.45%	
Individual Item Tax/Luxury Tax	A tax on a specific good, levied at the point of sale	Exists in Oregon in the form of sin taxes Retail Price of the Good (Unit or Ad Valorem)		Varies significantly by good (see pg. 100 of full report for details)	
Flat Rate Tax	A tax on individual income	Portland Art	Portland Art Tax filers		
Payroll Tax	A tax on wages paid out by all businesses	TriMet Payroll and Self-Employment Tax	Payroll Wages	0.176%	
Income Tax on the Highest Earners	Increases in income tax rate for top earners	California "Millionaire's Tax"	Tax filers with AGI over \$250 thousand	0.505% of adjusted gross income	
Bond Measure	Funded through an increase in property taxes	Metro Affordable Housing Bond Measure	Assessed Property Values		
Reset Assessment of Commercial Assessed Values	Increase in taxable property value		Commercial Properties	\$352 million in revenue from Multnomah County alone	
Real Estate Transfer Tax	A tax on property sales and transfers	Washington County Transfer Tax	All Property Sales	\$6.52 per \$1,000 in sale value	

Table 3.6: Revenue-raising options summary

Conclusion

We hope this report helps readers develop a better understanding of the scale and scope of the challenges we face when talking about homelessness and affordable housing as well as some pathways for moving forward. The work in front of us can seem daunting; however, through good governance, firm commitments, and hard work, we believe addressing homelessness and affordable housing is achievable.

I. GOVERNANCE

Introduction

In this section of the report, we describe various ways local governments might structure their responses to address homelessness, including ways to work together across jurisdictions. Governance may include formal arrangements between government and non-government entities to identify policies to address homelessness, or be a mechanism to administer a levy or bond. For context, we first discuss regional and collaborative governance, a familiar structure in the tri-county area. We then describe studies that focus on governance and homelessness specifically, though not all of those studies are regional in scope.

We then turn our attention to three places working on homelessness across the country. We focus most on Los Angeles (LA) County, California as our external example given its comprehensive efforts to address homelessness, and include shorter descriptions of Houston TX, Washington DC, and a local example, Multnomah County. We conclude by discussing what the guidance and examples of governance and homelessness could mean for the Oregon side of the Portland Metropolitan area.

Key Takeaways

- Planning and governing regionally offer important opportunities to create policies and programs to address inter-connected and cross-jurisdictional issues. Such efforts can reduce inefficiencies, reduce spatial disparities, and lead to more thriving regions.
- Planning and governing structures that work at a regional level require investment, politically and fiscally, and can take considerable time to structure justly and effectively.
- Identifiable leaders in government and civic society are needed to advance solutions for homelessness. They each play instrumental roles in building public support, and in raising revenue for addressing homelessness. They may work collaboratively or independently, or some combination of the two.
- Organizing and advocacy matter. The power of collaborative efforts is realized when they collectively advocate for policy and funding. Bottom-up organizing increases network power, and does not have to fully be subsumed within government driven processes.
- The best governance structure will not be effective if resources are too scarce to act on identified solutions; however, structures linked to or have advocacy agendas embedded in them could help identify those resources and apply pressure to obtain them.

- Some of the most successful governance groups included in this report focused on homelessness centered on racial equity. Poverty and race are inextricably linked, and communities of color face disproportionate rates of homelessness. In the four cases we describe, Black community members consistently experienced significant disproportionate rates of homelessness.
- We recommend the tri-county area form an exploratory committee or task force of an inclusive and committed set of stakeholders that is led by a government entity, or set of government entities, to examine in which ways better regional planning, policies, and program coordination around homelessness could help all jurisdictions meet their goals. This task force would do the following:
 - Deliberatively identify the "problem" to be solved. Problem identification should be the first step in both identifying who should be part of any future discussions as well as the first step of the group. Two examples of possible problem framings include: 1) Focusing on unsheltered homelessness; or, 2) Creating safe, quality, and affordable housing for all community members. Clarity about which problem (s) we are attempting to solve is essential to the success of any effort. We recommend the region carefully consider if we are trying to "solve" homelessness, or if we are trying to "solve" affordable housing.
 - We argue for the second framing, focusing on affordable housing. The second framing could include the first identified problem framing. Supporting people experiencing homelessness who are unsheltered will not solve affordable housing, and affordable housing is integral to helping them. However, without weighing trade-offs, we cannot know for sure exactly which is the best path to addressing affordable housing.
 - Include decisions and discussions about program and service coordination, policy making and implementation, and revenue raising and distribution.
 - Build on existing collaborative efforts, but not usurp them, and hold processes in an inclusive and equitable manner where equity refers to communities of color and people who have or are experiencing homelessness or housing insecurity. Transparency will be central to ensuring democratic governance as well as public support. Encourage processes occurring in civic society to continue their work independently.
 - Have an identified decision-making date where the group will make formal recommendations about how the region should move forward.
 - Define the homelessness community to include people who are doubled up. This is a substantial population that cannot be easily dismissed.
 - Center the process on racial equity. The racial disparities for communities of color experiencing homelessness or housing insecurity do not exist by accident, and the only way to really address and prevent homelessness will be to focus on their

needs. By focusing on achieving racial equity, other racial groups that do not experience disparities will also be served.

Regional Collaborative Governance

Planning and governing across jurisdictions requires coordination, and commitment. Early 20th century planning focused regionally, understanding that people and systems, urban ones in particular, did not adhere to jurisdictional boundaries. Over time, planning and governing work fell within jurisdictions, where city and county governments had regulatory control. However, recognizing the utility of cross jurisdictional work, issues from sharing fire and police services across county lines to developing 20-year land-use plans have been developed across jurisdictional boundaries.

Often referred to as regionalism, some of these efforts happen through one off planning processes, others build regional governance structures to implement plans and continue governing regionally. Early examples of regional governance structures include county-city mergers and council of governments. One of the best-known regional approaches to planning and governing is the Portland Oregon government Metro. Voted to function as a home-rule entity in 1993, Metro remains the only regional government in the country with directly elected representatives.²³

Best practices for developing and running regional governance abound in the academic and practitioner literature. Across the literature findings emphasize the importance of: 1) shared problem identification; 2) Actor willingness, interest, capacities, and resources; and, 3) inclusiveness of diverse actors in a well-designed process with clear leader(s) identified. See Figure 1.1 for a model of collaborative governance. Note that this model does not apply an equity lens, something that research has found important in successful governance cases.²⁴

While many of these best practices could apply in any planning process or governance structure, process design and actor relationships matter in a different way at the regional scale. In a HUD study about regional collaborative planning, the report cited Foster (2010) saying: "because these relationships do not depend on legal authority to ensure that the goals are met,

²³ See the following for a summary, and excellent summary table of regional governance options: Parr, J., Riem, J., & McFarland, C. (2006). Guide to successful local government collaboration in America's regions, Washington, DC: National League of Cities. As cited in: U.S. Department of Housing and Urban Development [HUD] (2015). *Strategies for regional collaboration.* Retrieved from: https://www.huduser.gov/portal/periodicals/em/fall15/highlight2.html#title.

²⁴ Inclusive democratic practices and equity are not the same thing. Inclusiveness refers to the process, and how people experience it. Equity can refer the process where there are deliberate components put in place to address inequity, and also refers to the equity of the outcomes of the process. It is possible to have an inclusive process with no equitable outcomes.

collaborative arrangements must rely on other forces and skills to create the cohesion necessary to achieve objectives."

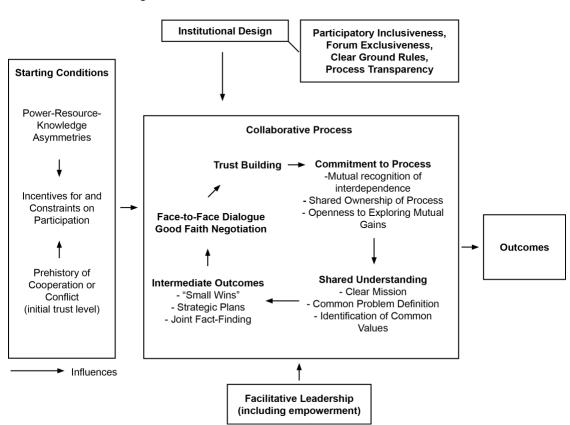


Figure 1.1: Model of Collaborative Governance 25

Homelessness Continuums of Care

Collaborative governance is not new within the field of homeless services. The McKinney-Vento Act of 1987 was the first federal law to specifically address homelessness, and the Act provides federal support for a multi-tiered system of homeless service programs at the local level.

The local multi-tiered system to address homelessness became known as the Continuum of Care (CoC) model in 1994. There were two ultimate goals for establishing CoCs: 1) better system alignment, efficiency, and coordination; and 2) developing plans and recommend policy to address homelessness. The CoC system was designed to facilitate coordination and integration of services, and enable a smooth transition for clients moving from one tier of service

²⁵ Ansell & Gash. (2008). Model of Collaborative Governance. From Bartenberger, M. & Grubmmller, V. (2014). The enabling effects of open government data on collaborative governance in smart city contexts. *SSRN Electronic Journal.* 6. DOI: 10.2139/ssrn.2474974.

to another on the path to permanent stable housing.²⁶ The system was also meant to recognize that the causes of homelessness for each individual are complex and include a variety of unmet needs, in addition to shelter itself. Today, CoCs are expected to develop and implement long-term strategic plans and planning efforts that evolve to meet changing needs of the various populations experiencing homelessness.

Three main programmatic branches made up, and continue to shape, the CoC model, and they were meant to operate as a series of stages. Emergency shelters were the point of entry in the system, and provide short-term housing in a crisis situation, for individuals in a variety of circumstances. Transitional housing was the next step, and entails service-intensive programming that aims to prepare clients to achieve self-sufficiency, aimed toward the next step. The final stage was either permanent supportive housing, or other housing options (market rate, subsidized), depending on the level of need. Permanent supportive housing serves individuals who are not able to live independently due to mental illness, substance abuse, physical disabilities, and/or other challenges.²⁰ While the need to progress across the system is not a central component, the range and types of organizations within homelessness are still viewed as a comprehensive network.

Shifting from allowing multiple applications, HUD now requires a community to submit a single application for funding rather than separate applications for each service provider.²⁷ HUD mandated that CoCs are governed by a range of stakeholders, including nonprofit organizations and government entities working on homelessness. The HUD guidelines are explicit about the importance of stakeholder engagement and collaboration in implementing homelessness services.²¹

Studies on Continuums of Care

Several studies focus on how CoCs have functioned as governance structures. In a survey of CoCs around the nation in 2014, researchers found that of the 234 CoCs that responded to the survey, their structures (e.g. size, membership, lead organizations) varied considerably.²⁸ The study further examined how those differences in structures, namely size, related to rates of reductions in service gaps. The study identified how group advocacy, networking opportunities, and government investment and support played pivotal roles in reducing service gaps.

²⁶ Wong, Y., L. I., Park, J.M., & Nemon, H. (2006). Homeless service delivery in the context of Continuum of Care. University of Pennsylvania. Retrieved from

https://repository.upenn.edu/cgi/viewcontent.cgi?article=1038&context=spp_papers 27 U.S Department of Housing and Urban Development [HUD]. (2009). *HUD's Homeless Assistance Programs: Continuum of Care 101* [PDF file]. Retrieved from

https://files.hudexchange.info/resources/documents/CoC101.pdf 28 Jarpe, M., Mosley, J. E., & Smith, B. T. (2019). Understanding the collaborative planning process in homeless services: Networking, advocacy, and local government support may reduce service gaps. *Journal of Public Health Management and Practice*, *25*(3), 262-269. For larger CoCs, like Multnomah and Washington counties, networking opportunities along with group advocacy were the strongest predictors of reductions in service gaps. The importance of advocacy mattered in service level reductions even when networking was low. For medium sized CoCs, which Clackamas County would have been at the time, reductions in services gaps were predicted by higher levels of government investment and support.

A study about Chicago's CoC reinforced the importance of networking as a space for community building and advocacy.²⁹ Representing a shift from past practices of non-profit organizations (NPOs), the NPOs in this CoC reported participating in advocacy work within the CoC intermediary organization, The Chicago Alliance to End Homelessness, as well as a traditional advocacy organization. Each group played important, and distinct, roles in influencing and operating within the Chicago policy context.

Based in Canada, the most in-depth and extensive study about collaborative governance and homelessness examined six different structures across three cities. The creation of a Canadian model similar to the HUD CoC program helped spur different collaborative models. One of the study's core findings illuminated that the more institutionalized processes were and the more inclusive they were, the better their systems were coordinated and created more innovative policy solutions. The study also illustrates the importance of having dual collaborative efforts where one can fulfill the CoC duties and another can take on greater advocacy. Lastly, the study examined overall policy-making environment assessing their degree of flexibility and how much the environment was influenced by the relevant CoC. The authors found that greater flexibility in policy-making and CoC visible influence on decision-making led to better outcomes.

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²⁹ Mosley, J. E. (2012). Keeping the lights on: How government funding concerns drive the advocacy agendas of nonprofit homeless service providers. *Journal of Public Administration Research and Theory*, 22(4), 841-866.

³⁰ Jarpe, M., Mosley, J. E., & Smith, B. T. (2019). Understanding the collaborative planning process in homeless services: Networking, advocacy, and local government support may reduce service gaps. *Journal of Public Health Management and Practice*, *25*(3), 262-269.

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Below we discuss four contemporary examples of homelessness governance systems. Each case example includes: Background about the region, actors working on homelessness, governance structures, revenue-raising efforts (where relevant), and progress to date (where possible). We devote the most attention to LA County as they are similar to Portland in several ways. They are: 1) located on the West Coast; 2) have several groups planning and acting for homelessness; and 3) have recently adopted revenue measures.³² Table 1.4 summarizes general aspects of the four cases on the following page.

³¹ Mosley, J. E. (2012). Keeping the lights on: How government funding concerns drive the advocacy agendas of nonprofit homeless service providers. *Journal of Public Administration Research and Theory*, *22*(4), 841-866.

³² Each site had a slightly different methodology. For LA County, We interviewed and consulted with several representatives of key actors in Los Angeles, and reviewed public documents, news articles, reviewed non-governmental reports, and PIT reports and US Census data. For Harris County and Washington DC we conducted the same secondary data analysis. We were unable to obtain interviews with people in these two locations, but did receive answers to questions via email from Harris County. We also asked people in Multnomah County for their views about the three places. For Multnomah County, one of the report authors, Dr. Zapata, is heavily involved in the governance structure and CoC for the county, and has written papers and given presentations about it. She asked for feedback from that section from Multnomah County stakeholders; however, she made the ultimate decision on what was incorporated.

Name	Size	Total Population	PIT Count 2019	PIT Count 2017	2019 PIT Sheltered	2019 PIT Unshelter.	2019 PIT/Total pop.	African Americans % 2019 PIT vs. % tot. pop.	Key Distinctions
Los Angeles County (All CoCs)	4,084 sq mi	10,441,090	58,936	52,765	14,722	44,214	0.56%	33% HUD homeless vs. 8.3% tot. pop.	Extremely limited amount of housing affordability and supply
Harris County et al CoC	3,771 sq mi	6,047,402	3,640	3,866	2,112	1,528	0.06%	55% HUD homeless vs. 20% tot. pop.	Lower comparative housing values + higher comparative vacancy rates
Washington DC CoC	68 sq mi	633,427	6,521	7,473	5,913	608	1.03%	87% HUD homeless vs. 41% tot. pop.	Legal right to shelter in <32 or >95 degree weather
Multnomah County et al CoC	466 sq mi	811,000	4,015	4,177	1,978	2,037	0.52%	16.1% HUD homeless vs. 7.2% tot. pop.	Comparatively recent significant increases in property values and rents

Table 1.1: Basic Facts about Cases

* African Americans consistently present with high levels disproportionate rates of homelessness across the country. Other communities of color may be too small in some areas to report, or not have disproportionate rates

Los Angeles County

Los Angeles County, and its included jurisdictions, has developed a network of formal and informal governance structures. These structures include relationships between entities as well mechanisms to oversee the distribution of raised revenue.

Background

LA County is a massive county, spanning 4,084 square miles with more than 10 million people and 88 municipalities. LA County is divided into service planning areas to facilitate planning and service delivery for homelessness efforts (see figure 2.1: LA County Planning Areas).33



Figure 1.2: Los Angeles Planning Areas₃₄

Los Angeles County has one of the highest homelessness rates in the nation. Persistent efforts to coordinate a response to the growing problem began several decades ago, and various government and non-government entities have played important roles in bringing entities together to identify shared ideas of how to address homelessness. Notably, discussions about racial equity have only recently entered into discussions about addressing homelessness.

The 2019 PIT Count revealed a 12% increase in the homeless population in LA County for a total of nearly 60,000 people.³⁵ About 63% are experiencing homelessness for the first time, and 53% of that cohort cite economic barriers to retaining housing as a root cause.³⁶ About 36% of individuals experiencing homelessness are Latino (47.7% of total population), 33.2% are Black (8.3% total population), 24.5% are white (27.8% of total population), and 0.8% are Asian (13.5% of total population), along with smaller percentages of other populations. This means Black people are four times more likely than Whites to experience homelessness.³⁷ This increase comes even with an estimated 21,631 individuals who were housed through county programs, and 27,080 who were able to reenter housing independently. That represents a daily rate of 131 people exiting homelessness and 151 entering homelessness. About 75% of individuals experiencing homelessness have lived in LA County for at least five years, and 71% do not have a serious mental illness and/or report substance abuse. Meanwhile, a series of

³⁵ Los Angeles Homeless Services Authority (2019). 2019 Greater Los Angeles homeless count results. Retrieved from https://www.lahsa.org/news?article=557-2019-greater-los-angeles-homeless-count-results
³⁶ Chiland, E. (2018). When will LA's big homelessness strategy start paying off? *Curbed LA*. Retrieved from https://la.curbed.com/2018/4/13/17229430/los-angeles-homeless-strategy-measure-h-results
³⁷ Los Angeles Homeless Service Authority. (2019). About LAHSA. Retrieved from https://www.lahsa.org/abo

³⁴ Los Angeles County Homeless Initiative. (2019). Measure H funded contracts [web page]. Retrieved from http://homeless.lacounty.gov/measure-h-funded-contracts/

state-level bills that would have ameliorated California's housing crisis failed in rapid succession, despite a Democratic supermajority (Walker, 2019). Several jurisdictions have enacted temporary emergency caps on rent increases, including the City of Glendale, and LA County, while the City of Inglewood formally adopted a rent control ordinance in 2019 (Chandler, 2019).

Select Entities Working on Homelessness

In LA County, a number of different organizations address homelessness. As government entities have the ultimate implementing role, we focus our attention on those organizations, and include a few non-governmental groups. This list is not exhaustive.

LAHSA

The Los Angeles Homeless Services Authority is an independent, joint powers authority, and is the lead agency in the Los Angeles Continuum of Care. It was created by the Los Angeles County Board of Supervisors, the Los Angeles mayor, and City Council in 1993. Its creation solved a lawsuit between the city and county over who was responsible for addressing homelessness.₃₈ LAHSA provides funding, program design, outcomes assessment, and technical assistance to more than 100 nonprofit partner agencies that serve those experiencing homelessness. This entails coordinating and managing over \$300 million annually in federal, state, county, and city funds.

LA County

The Los Angeles County Board of Supervisors (CBOS) created the Homeless Initiative in 2015, as a response to the escalating crisis. The Homeless Initiative is situated within the Chief Executive Office (CEO), and provides the CEO with guidance on how to allocate and deploy funds gathered through the Measure H sales tax. The Homeless Initiative Action Plan is organized around six key areas: Prevention, subsidized housing, increasing income, case management and services, coordinated system, and affordable housing.³⁹ Twelve lead agencies for the sub-areas of each of the key strategy areas administer the funds to community-based organizations, with support from collaborating County departments and agencies.⁴⁰ Additionally, in 2017 the Board approved \$2 million in funding for cities in the Los Angeles Continuum of Care to develop their own homelessness plans, as well as \$500,000 for regional coordination services by Councils of Governments.⁴¹ These figures do not include Measure H funding, which is explained below.

⁴¹ Los Angeles County Homeless Initiative. (2018). *City homelessness plans*. Los Angeles County. Retrieved from http://file.lacounty.gov/SDSInter/lac/1043966_AllCitiesHomelessPlans_8.31.18--pdf.pdf

³⁸ Burt, M.R. (2007). *System change efforts and their results: Los Angeles, 2005–2006* [PDF file]. Urban Institute. Retrieved from https://www.urban.org/sites/default/files/publication/46426/411449-System-Change-Efforts-and-Their-Results-Los-Angeles---.PDF

³⁹ Los Angeles County Homeless Initiative (n.d.) The Action Plan [web page]. Retrieved from http://homeless.lacounty.gov/the-action-plan/

⁴⁰ Los Angeles County Homeless Initiative. (n.d.). Measure H funded contracts. Retrieved from http://homeless.lacounty.gov/measure-h-funded-contracts/

Nongovernmental Actors

- The United Way of Greater Los Angeles has been instrumental over the last decade in helping partners articulate the fundamental role housing plays in preventing and ending homelessness. It launched the Everyone In campaign to engage community members in the Homeless Initiative in a variety of ways.⁴² The project website clearly frames homelessness as a housing crisis, and their objective is to elevate hidden stories of progress, galvanize residents to fight for housing in their neighborhoods, and apply political pressure for solutions. They also provide grants to nonprofit service providers through a request for proposals process.
- Corporation for Supportive Housing (CSH) is a key partner for service provider resources, supportive housing funding, program development, and policy advocacy.
- The LA Community Action Network (LA CAN) is a grassroots, volunteer-led organization based in Downtown LA, that aims to build collective political power through leadership consisting exclusively of the low-income constituents they serve.

Revenue Raising

The two most recent and largest revenue mechanisms within LA County include Measure H and Measure HHH. LA County runs the former, and the City of LA runs the latter.

Measure HHH

In 2016 LA City voters passed Bond Measure HHH, a \$1.2 billion bond that aims to create 10,000 affordable residences over ten years in the City of LA. LA CAN launched a phone bank in support of Measure HHH in October 2016, and their results overwhelmingly indicated support of the measure, which passed in November 2016 with 76% of the vote. LA CAN attributes Measure HHH's success to strong coalition-building across sectors, with City Hall, business elites, philanthropic organizations, churches, stakeholders, and community-based organizations all on board.⁴³

Measure H passed in a midterm election shortly after, in spring 2017. Measure H builds on the objectives of Measure HHH by creating the service infrastructure needed for supportive housing, which makes up a portion of the funding allocation for the bond: housing developers cannot secure bond money until service providers have been secured.⁴⁴ As of April 2019, 33 developments were approved, with 457 affordable residences, and 1,637 supportive residences. The total number of housing units in some stage of the housing pipeline is 7,400.⁴⁵

⁴³ Los Angeles County Board of Supervisors. (2017, February 7). *Motion by Supervisors Mark Ridley-Thomas and Sheila Kuehl*. Retrieved from <u>http://homeless.lacounty.gov/wp-</u>

content/uploads/2017/03/Board-Motion_-Measure-H-Planning-Process-Strategies_2-7-17.pdf

⁴⁵ Garcetti, E. (2019). Rising to the challenge: helping homeless Angelenos. City of Los Angeles. Retrieved from: <u>https://www.lamayor.org/rising-challenge-helping-homeless-angelenos</u>

⁴² Everyone In (2019). [United Way campaign]. Retrieved from https://everyoneinla.org/

⁴⁴ LA Times Editorial Board. (2017, March 3). Measure H is the key to finally ending homelessness in Los Angeles County. *The Los Angeles Times*. Retrieved from <u>https://www.latimes.com/opinion/editorials/la-ed-measure-h-vote-for-it-20170303-story.html</u>

Measure H

Measure H was a Los Angeles County ballot measure in which voters approved a ¼ of a cent sales tax increase to pay for homeless services in 2017.46 This measure implements strategies approved by County Board of Supervisors the previous year, which are mostly rooted in a "Housing First" approach. The tax increase will last ten years, and raise about \$355 million annually, and includes prevention services. The funds are administered by the Los Angeles County Homelessness Initiative.

Origin

The work of two regional bodies led to the creation of Measure H. First, the LA County Board of Supervisors adopted a set of 47 strategies to combat homelessness in 2016. They were devised through a comprehensive planning process led by the Homeless Initiative, which included 18 policy summits in 2015, that brought together 1,100 participants from 25 county departments, 30 cities, and over 100 community stakeholder organizations, including 4 focus groups with individuals with lived experience.47

Housing First

HUD defines Housing First as an "approach to quickly and successfully connect individuals and families experiencing homelessness to permanent housing without preconditions and barriers to entry, such as sobriety, treatment or service participation requirements. Supportive services are offered to maximize housing stability and prevent returns to homelessness as opposed to addressing predetermined treatment goals prior to permanent housing entry."1

LAHSA conducted an analysis of housing gaps for people experiencing homelessness in LA County. This report estimated a \$450 million funding gap, with a need of over 15,000 units of permanent supportive housing.₄₈ The LA County Board of Supervisors approved the creation of Measure H, to fund the Homeless Initiative strategies, per the funding gap.₄₉ Measure H would increase sales tax by ¼ cent for ten years, and proposed to generate enough funds to house 45,000 people experiencing homelessness and help another 30,000 people avoid losing their

⁴⁶ Chiland, E. (2017). Measure H: A voter guide for LA County's homelessness prevention ballot measure. March 7, 2017. *Curbed Los Angeles*. Retrieved from https://la.curbed.com/2017/3/6/14829792/ballot-measure-h-march-election-los-angeles-homelessness
⁴⁷ Ridley-Thomas, M. & Kuehl, S. (2017, February 7). *Motion: Measure H collaborative revenue planning process*. Los Angeles County. Retrieved from http://homeless.lacounty.gov/wp-content/uploads/2017/03/Board-Motion_-Measure-H-Planning-Process-Strategies_2-7-17.pdf
⁴⁸ Los Angeles Homeless Services Authority. (2016). *Report on homeless housing gaps in the county of Los Angeles*. Retrieved from https://www.cacities.org/Resources-Documents/Policy-Advocacy-Section/Hot-Issues/Homeless-Resources/League-CSAC-Task-Force/Nov-28,-2016/la_county_housing_gap_analysis.aspx
⁴⁹ Ridley-Thomas, M. & Hahn, J. (2016, December 6). *Motion: Securing ongoing funding to address the*

homeless crisis. Los Angeles County. Retrieved from http://file.lacounty.gov/SDSInter/bos/supdocs/109803.pdf homes.⁵⁰ It narrowly passed in the March 2017 special election, with just over the required twothirds of the vote.⁵¹

Citizens' Oversight Advisory Board (COAB)

Measure H is overseen by a community board. The COAB is comprised of five individuals, each of whom was nominated by a County Supervisor. The COAB meets quarterly, and meetings are open to the public. The board includes people from the nonprofit, foundation, and public service fields.

The COAB's official functions are threefold: semi-annual review of all expenditures from Measure H; annual accounting of allocations; and periodic evaluations of expenditures. Per Phil Ansell, director of the Homeless Initiative, the COAB may also incorporate other functions into their work.⁵² Quarterly meetings typically feature presentations from lead agencies and committees (e.g. Ad hoc Committee on Black People Experiencing Homelessness), discussion and questions from the Board, with opportunity for public comment and questions.

Progress to Date

The United Way of Greater Los Angeles said that funding has enabled them to quadruple the number of outreach teams on the streets, add 600 shelter beds, and provide subsidies to prevent 1,000 people from becoming homeless. The LA County Board of Supervisors has also approved \$20 million from the mental health budget for veteran services, and funding from the concurrent City of Los Angeles Measure HHH bond is funding low-income housing development.53 In August of 2018, LAHSA reported 7,448 people had been placed in permanent housing through Measure H, and 13,524 in interim housing.54 That number rose to 9,635 and 18,714 in November 2018.55 For a current snapshot on Measure H, please see Figure 2.2.

⁵² The Los Angeles County Homeless Initiative. (2017, Dec 7). *Measure H Citizens' Oversight Advisory Board Meeting Minutes* [PDF file]. Retrieved from <u>http://homeless.lacounty.gov/wp-</u> content/uploads/2018/03/12.7.17-COAB-Minutes_FINAL.pdf

https://www.scpr.org/news/2018/05/31/83625/veteran-homelessness-in-la-has-dropped-by-18-perce/ 54 CBS LA. (2018, August 17). 7,400 LA homeless now in permanent housing through Measure H, officials say. *CBS Local*. Retrieved from https://losangeles.cbslocal.com/2018/08/17/7400-la-homelesspermanent-housing-through-measure-h/

https://www.nbclosangeles.com/news/local/Measure-H-Helped-Homeless-Into-Permanent-Housing-501312852.html

Portland State University

⁵⁰ Gumbel, A. (2017, March 8). Los Angeles set to tax itself to raise billions for homelessness relief. *The Guardian*. Retrieved from <u>https://www.theguardian.com/us-news/2017/mar/08/los-angeles-homelessness-sales-tax-approved</u>

⁵¹ County of Los Angeles, Chief Executive Office. (2018, May 15). *Fiscal Year 2018-19 Measure H funding recommendations (All Supervisorial Districts)*. Retrieved from http://homeless.lacounty.gov/wp-content/uploads/2019/02/FY-2018-19-Measure-H-Funding-Recommendations-.pdf

⁵³ Denkmann, L. (2018, May 31). Veteran homelessness in LA has dropped by 18 percent. *KPCC: Member-supported news for Southern California*. Retrieved from

⁵⁵ NBC City News Service. (2018, November 2018). Measure H helped 10,000 homeless people into permanent housing, officials say. *NBC*. Retrieved from

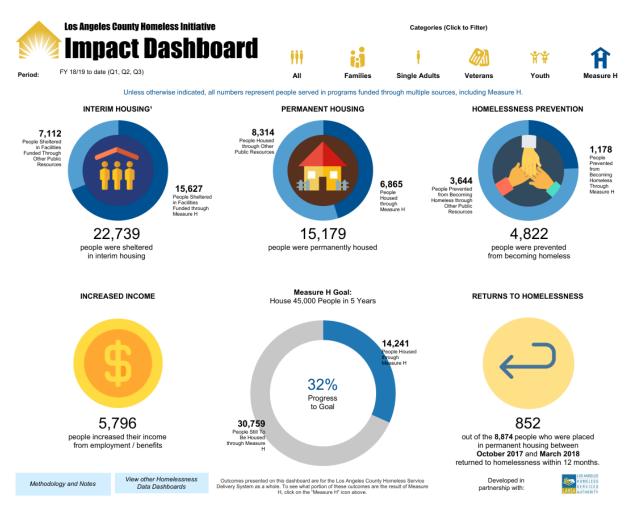


Figure 1.3: Measure H Dashboard56

The overall homeless population countywide decreased by 3% in 2018, but the number of people experiencing homelessness for the first time increased. This perhaps foretells the 2019 PIT Count, where the enormous number of people entering homelessness for the first time pushed the total population up 12% county-wide, despite significant progress in re-housing. Unlike the 2018 PIT Count, 2019's data show increases in every service planning area. As such, these efforts have not been without criticism. Foreshadowing the numbers of 2019, a February 2018 article in *The LA Times* reported the homeless population was increasing faster than the projected supply of new housing. Furthermore, the Homeless Initiative was facing a \$73 million annual budget shortfall which could more than triple. Providing permanent housing would require building 20,000 homes, which is 5,000 more than projected. The latest version of

⁵⁶ The Los Angeles County Homeless Initiative. (2019). Homeless initiative impact dashboard [web page]. Retrieved from http://homeless.lacounty.gov/impact-dashboard/

the Housing Gap Analysis report⁵⁷ also estimated a shortage of emergency rental subsidies, and needed shelter beds also increased by double digit percentages.⁵⁸ To add to these challenges, construction costs in Los Angeles have increased by 20% since housing Measure HHH passed, diminishing the total potential impact of the funds.⁵⁹

Implementation Limitations

Additionally, there were concerns in early 2018 that LAHSA did not have the capacity to manage the extensive scope of the work. The County Auditor-Controller found the organization short on staff and late on payments to community group contractors. In response to these findings, LAHSA director Peter Lynn said the agency is already in a much stronger position than during the audit, with new staff and workflow systems.⁶⁰ Some local homeless advocates were also growing restless at what they perceive as a lack of substantive response to a crisis situation. Mel Tillekeratne of the Monday Night Mission and Shower of Hope felt that some cities were doing nothing at all.⁶¹

Lastly, after criticism, the government entities working on homelessness pushed to integrate racial equity into their work. LAHSA created the Ad Hoc Committee on Black People Experiencing Homelessness. In early 2019 the 26-member committee released a groundbreaking report that details how institutional racism is driving the enormous disparity in the percentage of Black people experiencing homelessness.⁶² The report offers 67 recommendations to advance equity.

⁵⁷ Los Angeles Homeless Services Authority. (2018). *Report on homeless housing gaps in the county of Los Angeles: A homeless crisis response system model.* Retrieved from

https://www.sbceh.org/uploads/4/5/0/7/45075441/1865-2018-report-on-homeless-housing-gaps-in-thecounty-of-los-angeles.pdfhttps://www.lahsa.org/documents?id=1865-2018-report-on-homeless-housinggaps-in-the-county-of-los-angeles.pdf

⁵⁸ Smith, D., Holland, G., & Smith, D. (2018, May 31). Homelessness dips in L.A. and countywide, but Garcetti warns 'a real challenge' still remains. *Los Angeles Times*. Retrieved from

https://www.latimes.com/local/lanow/la-me-In-homeless-count-20180531-story.html

⁵⁹ McGahan, J. (2019, March 8). Will a measure to help L.A.'s homeless become a historic public housing debacle? *Los Angeles Magazine*. Retrieved from <u>https://www.lamag.com/citythinkblog/proposition-hhh-debacle/</u>

60 Los Angeles County Auditor-Controller (2018). Los Angeles Homeless Services Authority, Measure H, *Phase 1 – Fiscal operations assessment review* [PDF file]. Los Angeles County. Retrieved from http://file.lacounty.gov/SDSInter/auditor/cmr/1036006_2018-04-

03LosAngelesHomelessServicesAuthority-MeasureH-Phasel-FiscalOperationsAssessmentReview.pdf 61 Chiland, E. (2018, April 13). When will LA's big homelessness strategy start paying off? *Curbed LA*. Retrieved from https://la.curbed.com/2018/4/13/17229430/los-angeles-homeless-strategy-measure-hresults

62 Los Angeles Homeless Services Authority. (2019, February 26). Groundbreaking report on Black people and homelessness released. Retrieved from https://www.lahsa.org/news?article=514-groundbreaking-report-on-black-people-and-homelessness-released

The Greater Houston Area

Background

The Greater Houston area is a sprawling metropolitan region, home to almost 7 million people. It includes nine counties, and covers about 10,000 square miles. The City of Houston itself has a population of over 2 million people, and includes 669 square miles. The cost of housing is among the lowest in major US metro areas, at 9.3% below the national average, and 47.8% below the 20 most populous metros.⁶³ The Continuum of Care for Houston includes three of the most populous counties in the Greater Houston area (Harris, Fort Bend, and Montgomery Counties), representing about 3.1 million people from the metropolitan region.

The 2018 PIT Count recorded 4,143 individuals experiencing homelessness in the Houston area. Of these, 1,614 individuals were unsheltered, and 2,529 were living in shelters.₆₄ The 2019 PIT Count shows a 5% decrease since 2018, which represents a 54% overall decrease since 2011.₆₅ However, Hurricane Harvey continues to make an impact, with 1 in 9 people citing the natural disaster as their reason for being unhoused.₆₆ The CoC received \$38,155,969 in federal funding for FY 2018; the largest amount to be awarded to the region to date. This includes funding renewals for 43 existing homeless services programs, and an expansion of CoC's Coordinated Access program. It also includes new funding for several domestic violence housing programs.₆₇

Primary Actors Working on Homelessness

The Way Home

The Way Home, Houston's Continuum of Care, serves the City of Houston and City of Pasadena as well as Harris, Fort Bend, and Montgomery Counties.⁶⁸ Their mission statement is "...to create a collaborative, inclusive, community-based process and approach to planning for and managing homeless assistance resources and programs effectively and efficiently to end

⁶³ Jankowski, P., and Verhoef, M. (2019). Cost of living comparison. Greater Houston Partnership. Retrieved from https://www.houston.org/houston-data/cost-living-comparison

64 Coalition for the Homeless (2018). 2018 Homeless count & survey fact sheet [PDF file]. Retrieved from http://www.homelesshouston.org/wp-content/uploads/2018/05/Final_2018_PIT_FactSheet_Digital_3.pdf 65 Coalition for the Homeless (2019). 2019 Homeless count & survey fact sheet [PDF file]. Retrieved from http://www.homelesshouston.org/wp-content/uploads/2019/05/2019-PIT-Fact-Sheet-Final-for-Digital.pdf 66 Edwards, S. (2019, May 17). New data shows promising decline in greater Houston homelessness. *Houstonia.* Retrieved from https://www.houstoniamag.com/articles/2019/5/17/2019-homelessness-count-houston-harris-county-coalition-for-the-homeless-way-home

⁶⁷ Wright, A. (2019, Feb 27). The U.S. Department of Housing & Urban Development announces final awards from FY 2018 [web page]. The Way Home. Retrieved from

http://www.thewayhomehouston.org/the-u-s-department-of-housing-urban-development-announces-final-awards-from-fy-2018/

68 The Way Home. (2019). Continuum of Care [web page]. Coalition for The Homeless. Retrieved from http://www.homelesshouston.org/continuum-of-care/

homelessness in the jurisdiction..."₆₉ They partner with over 100 agencies to provide services, with a 'Housing First' approach to stabilizing individuals experiencing homelessness.₇₀ HUD recently merged Montgomery County's CoC into The Way Home due to infrastructure and efficiency concerns.

The CoC is governed by a Steering Committee comprised of representatives from across the community. These sixteen members are selected from the various counties served, and from the private, nonprofit and public sectors.⁷¹ According to the CoC's charter, each member of the Committee must have fiscal and program authority of the organization they represent.⁷² Organizations and jurisdictions on the Committee appoint their own representatives, while provider representatives are selected by the CoC Provider Forum, and Consumer representatives are selected from the Consumer Input Forum participants.

The Steering Committee's decisions are informed by service provider recommendations, which are discussed at the quarterly CoC Provider Forums.⁷³ These forums are the "primary policy, input and planning group for the CoC provider community",⁷⁴ and membership is comprised of homeless service provider agencies in the district. The Consumer Input Forum is a means to gather knowledge from the consumer population, and is composed of people with lived experience with homelessness, both past and present. It convenes no less than twice a year. Other components of the CoC are: The HMIS forum, the HMIS Support Committee, Provider Affinity Groups, Population Specific Work Groups, and Task Specific Work Groups.⁷⁵

⁶⁹ The Way Home. (2017). *The Way Home Continuum of Care Charter*. Page 1. Coalition for The Homeless. Retrieved from <u>http://www.homelesshouston.org/wp-content/uploads/2017/08/CoC-Charter-Revised-8-2017.pdf</u>

⁷⁰ Manouse, E. (2018, Oct 8). Houston's homeless situation - Working on a solution. *Houston Public Media*. Retrieved from https://www.houstonpublicmedia.org/articles/news/in-

71 The Way Home. (2019). Continuum of Care Steering Committee [web page]. Coalition for the Homeless. Retrieved from http://www.homelesshouston.org/continuum-of-care/steering-committee/
 72 The Way Home. (2017). *The Way Home Continuum of Care Charter* [PDF file]. Coalition for the Homeless. Retrieved from http://www.homelesshouston.org/wp-content/uploads/2017/08/CoC-Charter-Revised-8-2017.pdf

74 The Way Home. (2017). *The Way Home Continuum of Care Charter* [PDF file]. Page 4. Coalition for the Homeless. Retrieved from <u>http://www.homelesshouston.org/wp-content/uploads/2017/08/CoC-Charter-Revised-8-2017.pdf</u>

75 The Way Home. (2017). *The Way Home Continuum of Care Charter* [PDF file]. Coalition for the Homeless. Retrieved from http://www.homelesshouston.org/wp-content/uploads/2017/08/CoC-Charter-Revised-8-2017.pdf

depth/2018/10/08/307243/houstons-homeless-situation-working-on-a-solution/

⁷³ The Way Home. (2019). Continuum of Care Provider Forum [web page]. Coalition for the Homeless. Retrieved from http://www.homelesshouston.org/continuum-of-care/coc-provider-forum/

In recognition that funding was not being effectively applied and a new overarching strategy was needed, The Way Home released their Action Plan in 2014.76 Their new approach relies on data-driven decision making to allocate resources, and is organized by homeless population segment (e.g. veterans), rather than by strategies. This decision was made in accord with the Federal Plan, "Opening Doors," which provides a framework for ending homelessness by subpopulation, with an emphasis on veterans and the chronically homeless.77

In July 2019, The Way Home launched a new Eviction Prevention Program Pilot, in partnership with the Coalition for the Homeless, CSH, Harris County Community Service, Harris County Precinct 7, Texas Southern University's Urban Research and Resource Center, and consultant Barbara Poppe (former Executive Director of the U.S. Interagency Council on Homelessness). The program aims to help low- and moderate-income tenants avoid eviction through three key strategies: homelessness prevention funding; short-term case management; and research on strategies for avoiding eviction that can be replicated on a wider scale. The program was initiated by Judge Jeremy L. Brown, who felt a need to look toward preventative solutions in response to the staggering volume of eviction cases passing through the court system. 78

The Coalition for the Homeless

The Coalition for the Homeless is the lead agency within the CoC. It was established in 1982, incorporated as a 501(c)(3) in 1988, and has four program areas: Research, project management, system capacity building, and public policy.⁷⁹ Their role is to create a system that facilitates collaboration between service providers, government agencies, and community partners for the provision of services to people experiencing homelessness.⁸⁰ This collaborative model integrates partner service provider organizations with public sector efforts, under the direction of the Mayor's Office for Homeless Initiatives.⁸¹

The Mayor's Office for Homeless Initiatives

The MOHI₈₂ coordinates the efforts of agencies like the Housing and Community Development Department, the Health and Human Services Department, the Houston Police Department,

⁷⁶ The Way Home. (2016). *Action plan: 2015-2017 Update* [PDF file]. Coalition for the Homeless. Retrieved from <u>http://www.homelesshouston.org/wp-</u>

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content/uploads/2016/08/1617_Action_Plan_Final_Digital_082216.pdf
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77 U. S. Interagency Council on Homelessness (2015). *Opening doors: Federal strategic plan to prevent and end homelessness*. Retrieved from <u>https://www.usich.gov/tools-for-action/opening-doors</u>

78 Wright, A. (2019, July 3). Eviction prevention pilot launches in Houston [web page]. The Way Home.

Retrieved from http://www.thewayhomehouston.org/eviction-prevention-pilot-launches-in-houston/ 79 Coalition for the Homeless (2019). About us [web page]. Retrieved from

http://www.homelesshouston.org/about-us/who-we-are/

80 Coalition for the Homeless (2019). About us [web page]. Retrieved from

⁸¹ Mayor's Office for Homeless Initiatives [web page]. (2019). City of Houston. Retrieved from www.houstontx.gov/homeless/

82 Ibid

http://www.homelesshouston.org/about-us/who-we-are/

which has a Homeless Outreach Team.83 They also develop public policy for the City of Houston; guide the City's participation in regional planning around homelessness; and coordinate with federal, state and regional governments, national experts and local housing authorities. 84

Figure 1.4: Approach to redesigning the system85

We began with governance,

added support from a lead agency, a political champion, and community-driven strategic planning

we maintained focus to rightsize our system and are creating bridges to other systems.

We support this change through performance standards, capacity building and system flexibility.

⁸³ Houston Police Department, Mental Health Division. (2019, April 2). Homeless outreach team [web page]. Retrieved from: https://www.houstoncit.org/test/
⁸⁴ Mayor's Office for Homeless Initiatives [web page]. (2019). Retrieved from www.houstontx.gov/homeless/
⁸⁵ The Way Home. (2016). *Action Plan: 2015-2017 Update*. Retrieved from www.houstontx.gov/homeless/

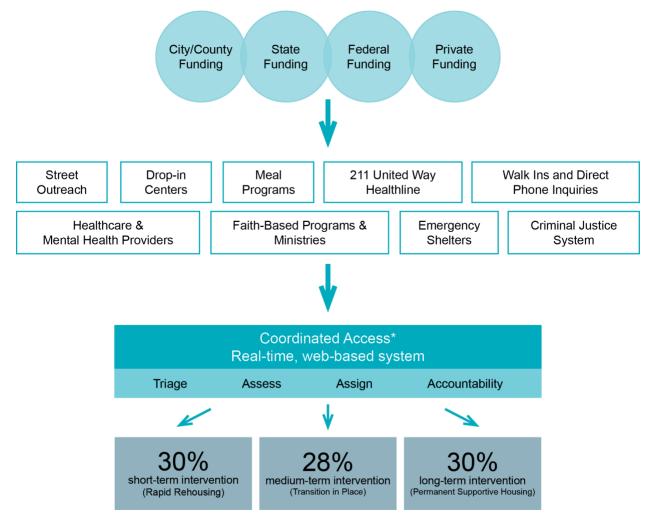


Figure 1.5: The Way Home Homeless Response System86

*12% of the homeless population will solve homelessness on their own

Progress to Date

Houston reports significant declines in their homelessness population. They credit increased support from HUD starting in 2011, and an articulated focus on a single population (veterans).⁸⁷ Lower housing values and land prices also factor into Houston's successes. The last Point-in-Time count showed another decline in homelessness, after an uptick attributed to Hurricane

86 The Way Home. (2016). *Action Plan: 2015-2017 update.* Retrieved from www.homelesshouston.com 87 Garnham, J. P. (2019, July 2). Why homelessness is going down in Houston but up in Dallas. *The Texas Tribune.* Retrieved from https://www.texastribune.org/2019/07/02/why-homelessness-going-downhouston-dallas/ Harvey.⁸⁸ In a recent visit to Houston, the City of Anchorage Alaska's mayor noted the ability of government and private sector actors to work together in addressing homelessness as a component of their successes in reducing the overall numbers of people experiencing homelessness.⁸⁹

Washington DC

Background

The District of Columbia has a smaller geographic footprint compared to the other case studies, at only 68 square miles. The population, however, is not far below Multnomah County, with 702,455 residents, making it the densest of the four areas studied. The PIT Count data discussed in this report refers to the city itself. Washington DC is situated within the Washington metropolitan area, which includes portions of Maryland and Virginia, and is the most educated and affluent region in the US.⁹⁰ The total population of the region is 5,441,979 people. The District is the fifth most expensive US city, with housing costs 2.7 times the national average.⁹¹ Renters are the majority in the city, representing 62% of households, yet 48% of renters are cost-burdened.⁹² Washington DC is the only of our case examples with a right to shelter at any time of the year.

Washington DC has an unusual governmental structure and history, due to its status as an independent city without a state. It was only in 1973 that the District of Columbia Self-Government and Governmental Reorganization Act was passed, which provided for an elected mayor and 13-member Council. The act allows Congress to review and overturn any legislative act of Council within 30 legislative days. In 1997 Congress stripped financial authority from locally elected representatives in the face of mismanagement, and transferred control to the federal government. Local authority under the Home Rule Charter was restored in 2001.93 The city's budget is created through an iterative process between the Mayor and the Council, and

https://nationalequityatlas.org/node/50176

93 Richards, M. (2002). History of local government in Washington, D.C. D.C. vote: Strengthening democracy. Retrieved from https://www.dcvote.org/inside-dc/history-local-government-washington-dc

⁸⁸ Edwards, S. (2019, May 17). New data shows promising decline in greater Houston homelessness. *Houstonia.* Retrieved from https://www.houstoniamag.com/articles/2019/5/17/2019-homelessness-count-houston-harris-county-coalition-for-the-homeless-way-home

⁸⁹ Howard, A. (2019, June 13). Anchorage mayor cites Houston model for best practices to end homelessness. *JHV*. Retrieved from http://jhvonline.com/anchorage-mayor-cites-houston-model-for-best-practices-to-end-homelessness-p26128-89.htm

⁹⁰ Homan, T. (2010, December 14). Washington suburbs are richest, most educated in U.S. *Bloomberg*. Retrieved from https://www.bloomberg.com/news/articles/2010-12-14/washington-d-c-metropolitan-area-is-wealthiest-most-educated-u-s-region

⁹¹ Burrows, D. (2019, April 216). 20 most expensive U.S. cities to live in. *Kiplinger*. Retrieved from https://www.kiplinger.com/slideshow/real-estate/T006-S001-most-expensive-u-s-cities-to-live-in-2019/index.html

⁹² National Equity Atlas. (2017). *When renters rise, cities thrive.* National Equity Atlas, PolicyLink & USC Program for Environmental and Regional Equity. Retrieved from

must be approved by Congress. DC residents have long complained of "taxation without representation," as they have no official representative in the Senate.

Two years ago, the nation's capital had one of the highest rates of people experiencing homelessness in the country,⁹⁴ with an increase of 50% between 2000 and 2015. That number represents almost 1% of all District residents, or 101 people per square mile. According to the 2019 PIT Count, 6,521 individuals were experiencing homelessness, which represents a 6% decrease from the previous year, and an 11% decrease since 2015. The count shows 608 of those individuals were unsheltered, 4,679 were in an emergency shelter, and 1,234 were in transitional housing. The decrease is primarily attributed to a reduction of families in the population, which diminished by 11.8%, and 45.3 % in 2016.⁹⁵

Selected Actors Working on Homelessness

The Metropolitan Washington Council of Governments

The Metropolitan Washington Council of Governments' (MWCOG) is comprised of 300 elected officials from 24 local governments, the Maryland and Virginia state legislatures, and the U.S. Congress. The council's Homeless Services Planning and Coordinating Committee manages the annual PIT Count, and convenes to share strategies "in addressing common challenges that are unique to living in a high-cost housing market such as metropolitan Washington."₉₆ The MWCOG also provides training, discussions and speaking events for members of the Committee. Membership is extended to representatives from human services departments of the various jurisdictions in the MWCOG, and to employees of nonprofit members of the CoC. They hold monthly public meetings in Washington D.C.

The District of Columbia Interagency Council on Homelessness

The District of Columbia Interagency Council on Homelessness (ICH) is the Continuum of Care, and includes representatives from government agencies, service providers, advocates, constituents, the private sector, and the CoC. Council members also meet as the following committees: Emergency Response and Shelter Operations, Youth, Strategic Planning, and Housing Solutions.97

https://www.mwcog.org/documents/homelessnessreport/

97 District of Columbia Interagency Council on Homelessness (n.d.). *About us.* Retrieved from: https://ich.dc.gov/page/about-ich

⁹⁴ Weiland, N. (2017, Jan 1). D. C. Homelessness doubles national average as living costs soar. *New York Times*. Retrieved from https://www.nytimes.com/2017/01/01/us/washington-dc-homelessness-double-national-average.html

⁹⁵ Chapman, H. (2019). Homelessness in metropolitan Washington: Results and analysis from the annual Point-in-Time (PIT) count of homeless persons. Retrieved from

⁹⁶Metropolitan Washington Council of Governments. (2019). Homeless Services Planning and Coordinating Committee. Retrieved from https://www.mwcog.org/committees/homeless-services-planning-and-coordinating-committee/

At the behest of newly elected mayor Muriel Bowser, the council developed *The Homeward DC Strategic Plan (2015-2020)*.⁹⁸ The overarching vision of the plan is to end long-term homelessness in the District by 2020. Within that vision there are three major goals: End homelessness among veterans by the end of 2015; End chronic homelessness among individuals and families by the end of 2017; and to be able to rehouse any household experiencing a loss of housing within 60 days, by 2020. The plan is organized around five key strategy areas:

- 1. Develop a more effective crisis response system;
- 2. Increase the supply of affordable and supportive housing;
- 3. Remove barriers to affordable and supportive housing;
- 4. Increase the economic security of households in our system; and
- 5. Increase prevention efforts to stabilize households before housing loss occurs.99

The collaborative process was led by the ICH, and took place between June 2014 and March 2015. It involved government representatives, nonprofit partners, advocates, people with lived experience, members of the business and philanthropic communities, and consultants from the Corporation for Supportive Housing (CSH), Abt Associates, and Community Solutions.

The Plan mainly utilizes data collected through the HMIS, and is supplemented by additional data from other agencies. In keeping with ICH practice, standing committee and work group meetings were (and remain) open to the public, and during the process of developing the plan there were additional public meetings to solicit stakeholders' feedback. In total, twenty-six public meetings were held as part of the planning process, which took place at various locations and focused on different topics.

The Community Partnership for the Prevention of Homelessness

The Community Partnership for the Prevention of Homelessness (TCP) manages the Continuum of Care for the District of Columbia, and the HMIS database. They were established in 1989, and their mission is to "utilize community resources to create innovative strategies that prevent homelessness in our city."₁₀₀

⁹⁸ District of Columbia Interagency Council on Homelessness. (2015). *Homeward DC 2015-2020*. Retrieved from https://ich.dc.gov/sites/default/files/dc/sites/ich/page_content/attachments/ICH-StratPlan2.7-Web.pdf

⁹⁹ District of Columbia Interagency Council on Homelessness. (2015). *Homeward DC 2015-2020*. Retrieved from https://ich.dc.gov/sites/default/files/dc/sites/ich/page_content/attachments/ICH-StratPlan2.7-Web.pdf

¹⁰⁰ The Community Partnership for the Prevention of Homelessness. (n.d.). About us [web page]. Retrieved from: <u>http://community-partnership.org/about-us</u>

The Way Home

The non-governmental organization The Way Home (no relationship to the Houston organization) has been leading an independent campaign to end chronic homelessness in the city for several years. The campaign is partnered with nearly 100 local and national organizations, from healthcare providers to the private sector.¹⁰¹ One of their key efforts is advocating for housing and services funding allocations in each year's Fiscal Year budget. This year they are requesting \$20.6 million, in addition to the \$35 million in the proposed 2020 budget.¹⁰² In addition to more funding for housing and services, they are asking for funding specifically for a homeless street outreach network.¹⁰³ The organization's position is situated in the belief that Washington D.C.'s homelessness strategy is *working*, per the 2019 PIT Count numbers, and needs robust continued funding.¹⁰⁴ Their direct action, A People's Budget Action to End Homelessness, convened in front of the DC Council building May 8 to demand increased funding.

Funding and Progress to Date

In April of 2019 the ICH met publicly to discuss the draft Homeward D.C. progress report, which will be submitted to Mayor Bowser as a required precursor to the creation of Homeward D.C. 2.0. According to ICH Executive Director Kristy Greenwalt, the greatest strides have been made in reducing the number of families experiencing homelessness, which has gone down by 38% in two years. Greenwalt also stated the difficulties of contending with changing externalities like rising rents, while implementing the plan.¹⁰⁵

The mayor's proposed Fiscal Year 2020 budget includes \$103 million in housing funding, of which \$35 million would be explicitly dedicated to Homeward D.C., with the remainder going to affordable and workforce housing. The \$35 million will go toward supporting short-term family shelters, rapid rehousing, and permanent supportive housing. These spending increases are enabled by making the commercial property tax of \$1.89 permanent (\$25 million) and increasing the deed and recordation tax on commercial properties over \$2 million from 1.45% to 2.5% (\$78

101 The Way Home District of Columbia. (n.d.). Retrieved from http://thewayhomedc.org/miriamskitchen/?0

¹⁰³ Rabinowitz, J. (2019, April 12). FY20 budget increases funds to end chronic homelessness, falls far short of need [web page]. The Way Home: Ending chronic homelessness in DC. Retrieved from http://www.thewayhomedc.org/app/document/32967864

Rabinowitz, J. (2019, May 1). Decrease in chronic homelessness shows DC on is on the right track, more funding needed [web page]. The Way Home: Ending chronic homelessness in DC. Retrieved from http://www.thewayhomedc.org/app/document/33156804

105 Collins, A. (2019, April 17). In progress report, ICH looks at successes and shortcomings of plan to end homelessness. *Street Sense Media*. Retrieved from https://www.streetsensemedia.org/article/in-progress-report-ich-looks-at-successes-and-shortcomings-of-plan-to-end-homelessness/

¹⁰² Ibid

million).¹⁰⁶ Equity continues to be a major issue in the District, as 97% of families experiencing homelessness are African American, while that group makes up only 40% of the total population.¹⁰⁷

In June of 2019, Mayor Bowser, the ICH, and the Greater Washington Community Foundation launched the Partnership to End Homelessness.¹⁰⁸ The initiative aims to galvanize private sector investment, and coordinate the public and private sectors around a central strategy to address homelessness and housing insecurity in the city. ICH director Kristy Greenwalt cites the need for a "formal structure for better mobilizing and aligning the contributions of private sector partners" (ICH, 2019). The new partnership will increase philanthropic and private sector capital opportunities to nonprofits, in order to accelerate efforts under the Homeward DC strategic plan.

Multnomah County

Multnomah County has worked with the City of Portland, the City of Gresham, nonprofits and faith, philanthropic, and business communities and developed several mechanisms for addressing housing and homelessness in the area.

Background

Multhomah County, Oregon is home to eight incorporated cities, including the cities of Portland and Gresham, unincorporated land, and is 466 square miles. Multhomah County is the center of the Portland metropolitan statistical area, which includes seven counties and spans two states (Oregon and Washington). Four of the counties are located in Oregon (Multhomah, Clackamas, Washington, and Yamhill Counties). While all seven of the counties' housing and labor markets are inextricably linked together, the regulatory environments are distinct. Policy work and program delivery related to housing and homelessness is further complicated by having two different state legislatures.

Unique in the nation, the regional government, Metro, serves as the MPO for three of the counties on the Oregon side of the border, which includes Multnomah, Clackamas and Washington counties. Here, representatives are directly elected to Metro council, and the representation system reflects traditional local government systems, as opposed to the more complex regional governance structures found across the country. About 811,000 people live in Multnomah County, or 46% of the tri-county regional population.

¹⁰⁶ Telerski, N. (2019, April 17). The mayor's budget proposal contains \$103 million in support for affordable housing production and preservation. *Street Sense Media.* Retrieved from https://www.streetsensemedia.org/article/dc-mayor-budget-support-affordable-housing-production-preservation/

 ¹⁰⁷ Collins, A. (2019, April 17). In progress report, ICH looks at successes and shortcomings of plan to end homelessness. *Street Sense Media*. Retrieved from www.streetsensemedia.org
 ¹⁰⁸ The Greater Washington Community Foundation. (n.d.). Partnership to end homelessness [web page]. Retrieved from https://www.thecommunityfoundation.org/partnership-to-end-homelessness. Efforts to coordinate a response to homelessness in Multnomah County go back about two decades with the creation of a 10-year plan to end homelessness (adopted in 2004).₁₀₉ At that time, Multnomah County worked with the homeless family system, and the City of Portland supported houseless single adults. While the plan faced implementation challenges, this early work on collaboration helped create connections among stakeholders addressing homelessness. In recent years, a flurry of governance agreements and revenue-raising tools have been adopted. According the 2017 Point-in-Time count, almost 4,200 people met the definition to be described as homeless according to HUD, about 0.5% of the population.

Selected Actors Working on Homelessness

Joint Office of Homeless Services (JOHS)

Created in 2016, the JOHS coordinates homelessness services from Multnomah County and the City of Portland. The JOHS also manages the CoC, A Home for Everyone. The JOHS's IGA has a five-year term.

A Home for Everyone (AHFE)

Created in 2013, AHFE is a multijurisdictional governance structure to end homelessness in Multnomah County. The participating government partners include Multnomah County, the cities of Portland and Gresham, and the area housing authority, Home Forward. The entire structure brings together various stakeholders, including government, nonprofit, private sector, and community members who have experienced homelessness, to make plans, policy, and budget recommendations to address homelessness through a collaborative governance process. AHFE serves as the Multnomah County and Portland's CoC.

AHFE consists of several committees, boards, and task forces. The executive committee includes elected officials from the three participating jurisdictions, the local housing authority, philanthropic organizations, the coordinating board co-chairs, and selected civic leaders. The coordinating board includes about 40 stakeholders from social service agencies, government agencies (elected officials and staff), and community members who have experienced homelessness. The coordinating board makes recommendations to the executive committee based on their deliberations and input from other committees. The executive committee then makes decisions about what to recommend that jurisdictions do to address homelessness. Ideally, the elected officials on the executive committee take the recommendations back to their home jurisdictions and advocate for the decisions of the executive committee. The majority of the AHFE work focuses on making budgetary recommendations to the relevant jurisdictions, developing shared standards of care, recommending regional policy to address homelessness.

109 Citizens Commission on Homelessness. (2004). Home again: A 10-year plan to end homelessness in Portland and Multnomah County [PDF file]. Retrieved from http://www.mentalhealthportland.org/wp-content/uploads/2015/10/FULL-ACTION-PLAN.pdf and acting as the US Department of Housing and Urban Development (HUD) Continuum of Care.

Early in its work, AHFE created *A Home for Everyone: A United Community Plan to End Homelessness* that included five supporting strategic plans for housing, health, employment, veterans, and safety off the streets.¹¹⁰ This work also includes accessing services, system coordination, and several vulnerable populations such as veterans. Similarly to other locations, AHFE has made significant progress in housing veterans in part thanks to funding focused on this population made available during the Obama administration.

AHFE includes a stated goal to racial equity, and employs a racial equity lens. In 2018, AHFE created a standing equity committee, at the recommendation of its equity task force. A JOHS staff membered started full-time in 2019 to help implement the goals of the equity committee.

As of August 2019, the IGA for AHFE has expired, and AHFE is undertaking a strategic planning process.

Racial Equity Lens

A decision-making tool that helps people consider the disparate impacts and equitymaking opportunities for policies, plans, programs, and projects.

Multnomah County

Before the formation of the JOHS, Multnomah County managed the homeless family system, having responsibility for families, youth, and domestic violence services. In addition, the County maintained and maintains many of the mainstream programs that provide care to people who otherwise would be homeless—e.g. Aging Disability and Veterans Services, Mental Health and Addictions Services— and also oversees a range of anti-poverty programs, including school based anti-poverty programs that help stabilize families with children at risk of homelessness. While JOHS is a joint venture between Multnomah County and the City of Portland, the JOHS staff are classified as county employees.

City of Portland

As the largest city in the Portland region, the city is also home to significant influx of new community members, escalating housing prices, new luxury housing, and redevelopment catering to the upper end of the housing market. In 2015, the city declared a housing emergency to expand its powers to address the spiraling housing market. In 2016, trying to address the ever-shrinking amount of affordable housing, city residents approved a seven year \$258.4 million bond to provide housing. The City of Portland continues to have primary responsibility for developing affordable housing, and until the creation of the JOHS, managed

110 A Home for Everyone. (2013). A Home for Everyone: A united community plan to end homelessness for Portland/Multnomah County. Retrieved from http://ahomeforeveryone.net/the-plan.

the adult homelessness system. The city continues to maintain the Homeless Management Information System (HMIS), both for Multnomah County and for CoCs across Oregon state.

Metro

The regional government sponsored a housing bond that passed in 2018 to raise \$652.8 million in revenue to build permanently affordable housing. The bond signified Metro's interest in expanding its role in addressing the housing crisis, requiring a revision of its charter.

Home Forward

Home Forward is the housing authority from Multnomah County, but goes beyond the traditional role of a housing authority. HF is an active participant in AHFE, and part of an integrated network of government entities committed to addressing homelessness.

Nongovernmental Actors

A wide range of faith, philanthropic, business, and nonprofit organizations have rallied in support of housing solutions to homelessness in the tri-county area. In the interest of space and to avoid leaving any partners out, we decided to talk about nongovernmental actors in more general terms. These partners are pivotal in many ways including oversight of governance, support for revenue measures, complementing regional efforts, advancing racial equity, and educating and encouraging the public to see housing solutions to homelessness.

Revenue Raising

Revenue in the Portland region has been raised through two funding mechanisms: a Portland housing bond and a regional housing bond. The City of Portland's Housing Bond was passed by voters in November 2016, and allocates \$258.4 million to create more affordable housing. The Portland Housing Bureau (PHB) is leading the effort in collaboration with city officials and community partners. The bond aims to create 1,300 affordable homes for 650 households making no more than 60% Area Median Income (AMI), over a five- to-eight-year period. At the time the bond was passed, state law stipulated that only a public entity could own housing built with bond proceeds, and Home Forward stepped into the role. This law changed in November of 2018, when voters passed a constitutional amendment allowing bond funds for affordable housing to be loaned to private entities. All housing under construction up until that time will be owned by Home Forward.

Allocation of funds is shaped by the 22-member Stakeholder Advisory Group (SAG), which was convened in April 2017. Members were mainly representing community partners from the nonprofit sector, with a few public sector participants. The group met nine times over six months to develop the Housing Bond Policy Framework, which will be used to guide decision-making, and to evaluate expenditures in annual reporting. After the framework was in draft form, Portland Housing Bureau conducted five weeks of community outreach to solicit comments,

which numbered nearly 1,000.111 The Policy Framework established production goals, community values, communities to be served, services, reporting metrics, and guidelines for ongoing community engagement.

Oversight of the bond funds is handled by Portland's Housing Bond Oversight Committee (BOC), as stipulated by City Council when they referred the measure for the ballot.112 The fivemember committee is appointed by the commissioners and mayor, and is responsible for reviewing bond expenditures, and providing annual reports. This includes tracking implementation metrics against the Housing Bureau's Racial Equity Plan, and monitoring utilization of disadvantaged, minority, women, and emerging small business to support community benefits.

In November 2018, voters in the Metro area passed the nation's first regional housing bond, which sets out a goal of creating 3,900 affordable homes in five to seven years, using \$652.8 million in funds.113 About 1,600 of these will be set aside for households earning 30% AMI or less. Overall, the bond aims to house between 7,500 and 12,000 people. Unlike Portland's Housing Bond, the framework was developed in advance of the Metro Council referring it to the ballot. Core values are leading with racial equity; prioritizing people least served by the market; increasing access to public goods and preventing displacement; and creating fiscally sound and transparent investments.114 This framework was developed through months of engagement with partners and community members.

Between February and June 2019 a separate community engagement process was conducted. This effort focused on local strategies to address housing needs, providing a forum for stakeholder feedback, and identifying opportunities to create affordable housing. Public meetings were held in each of the jurisdictions, and facilitated by either nonprofit community partners or local governments.

The Metro Council voted to appoint thirteen members of the committee that will oversee the region's affordable housing program. They will be tasked with tracking construction of the 3,900 homes planned under the bond measure. Annual independent audits will also be conducted. The members of the committee are a mix of professionals from the private and nonprofit sectors. The committee meets once a month.

https://www.portlandoregon.gov/phb/article/659537

¹¹¹ Bond Stakeholder Advisory Group for the Portland Housing Bureau. (2017). *Portland's Housing Bond Policy Framework* (pp. 1-71). Retrieved from

¹¹² Portland Housing Bureau. (2017). *Portland's Housing Bond Oversight Committee: Charter and protocols*. Retrieved from <u>https://www.portlandoregon.gov/phb/article/692098</u>

¹¹³ Homes for Greater Portland. (2018). *Implementing Metro's affordable housing bond* [PDF file]. Retrieved from https://www.oregonmetro.gov/sites/default/files/2019/02/12/housing-bond-fact-sheet-02122019.pdf

¹¹⁴ Oregon Metro. (2018). Affordable homes for greater Portland: Metro Chief Operating Officer recommendation. Retrieved from: https://www.portlandoregon.gov/phb/article/708741

Progress to Date

Since the creation of AHFE, the following goals have been achieved: (1) expansion of system capacity to prevent and end homelessness using local general funds; (2) doubling the publicly funded shelter system; (3) because of the strength of the governance structure, investing and programming in alignment with AHFE identified values/priorities/practices, including culturally specific and responsive programs; and, (4) integrating disparate data collection, entry, and reporting practices to allow for system-level reporting.

A June 2019 audit of the Portland Housing Bond finds positive early results of the implementation process, with consistent project selection criteria.¹¹⁵ To-date, 662 homes have been completed or are in-progress. The audit recommends greater attention to veterans, disabled and senior populations, and evaluating the target populations of each project.

The recently released Point-in-Time count found a small, but overall decline in homelessness in Multnomah County, but an increase in unsheltered people experiencing homelessness. African American and Native American men saw significant increases in chronic homelessness. At the same time, A Home for Everyone served over 35,000 people experiencing or at risk for homelessness in fiscal year 2017–2018.

Moving Forward in the Portland Tri-County Area

The purpose of this report is to examine homelessness issues and possible responses for the Portland tri-county area, and its three CoCs (one in each county). Developing just and meaningful regional governance takes time, and requires both political and financial support. However, given the pivotal role housing and labor markets play in homelessness, and that these markets are regional in nature, identifying collaborative opportunities for the tri-county region could be instrumental in addressing homelessness. Further, service provision will likely be more effective if it occurs on a regional scale, mirroring how people and the relevant systems operate.

Multnomah, Washington, and Clackamas counties and cities within their boundaries, along with Metro, should convene a task force or working group to examine the potential benefits of addressing homelessness through regional coordination. Such a group should have a clear deadline for making decisions and recommendations about how the region should move forward. The group should consider which issues and/or programs in particular could be better coordinated regionally related to homelessness. Problem identification will be essential in any coordinating work or long-term governance process. If the solution to homelessness is housing, then homelessness and housing discussions should be integrated while explicitly working to understand how any efforts to serve one part of the population needing affordable housing

115 Caballero, M., & Guy, K. (2019). *Portland Housing Bond: Early implementation results mostly encouraging*. Portland City Auditor: Audit Services. https://www.portlandoregon.gov/auditservices/article/734894 impacts others. **Solving affordable housing is not the same thing as solving chronic homelessness**. To address the need for affordable housing, we need to consider housing across the income spectrum, and weigh trade-offs and interaction effects between interventions. Solving chronic homelessness would mostly focus on creating permanent supportive housing through a Housing First model. Both creating more access to affordable housing for all relevant income groups, and supporting people who are chronically homeless are necessary. Achieving both would be remarkable, but doing so at the same time can only happen through deliberate and careful planning.

Metro, and its participating jurisdictions, started this work at the regional level with its affordable housing bond. However, this bond only covers capital costs and only for about 12,000 of the people in need across the region. A significant resource gap still exists in serving everyone experiencing homelessness and housing insecurity in the region.

A logical next step to the Metro housing capital bond, would be to raise revenue across the region to pay for services to match the capital bond. Section 3 of this report provides details on various ways that revenue could be raised in addition to Metro. Regardless of how revenue is raised and which government entity raises it, it is essential to have a transparent process that determines how the revenue will be spent including a public-facing body to oversee it that is based on a racial equity lens framework. Long-term planning work, and shorter-term work such as exploring other revenue measures could occur in tandem. For instance, the region moves forward on existing efforts such as the Regional Supportive Housing Impact Fund, which is dedicated to raising funding for permanent supportive housing. At the same time, a government-driven process could begin to identify next steps in the region.

Government-led discussions must occur transparently and include those who are most marginalized in the region and have experienced homelessness or housing insecurity. These discussions should build on existing coordinating discussions about homelessness such as A Home for Everyone, other county CoCs, and groups like the Regional Housing Impact Fund,¹¹⁶ but continue to allow these groups to work independently. For example, Los Angeles County represents a complex and intensive set of coordinated efforts to address homelessness. The efforts of different public and private actors in LA County created an overlapping set of activities largely focused on the belief that providing stable housing is the best path to addressing homelessness. Their present-day efforts build on over a decade of work to coordinate responses to addressing homelessness. In the tri-county area, encouraging the work of civic society groups, non-profit organizations, and advocacy movements, are, thus, also necessary to address and prevent homelessness across the region. Solutions to affordable housing and

116 CSH. (2019). *Tri County equitable housing strategy to expand supportive housing for people experiencing chronic homelessness* [PDF file]. Retrieved from https://d155kunxf1aozz.cloudfront.net/wp-content/uploads/2019/03/Metro_SupportiveHousing_Report_WithAppendices_March_Einal.pdf

homelessness may not rely on one large multi-stakeholder table, but rather rest on several small to medium-sized tables.

II. COSTS OF ADDRESSING HOMELESSNESS

Background

In this section of the report, we estimate the number of people experiencing homelessness as well as those who need support to prevent homelessness. We then provide a set of cost estimates that include housing those experiencing homelessness, assisting those at risk of homelessness, and providing appropriate services to both groups.

Key Takeaways

- Communities of color (namely Black, Latino, and Native American communities) are disproportionately represented in the homelessness counts and/or renter cost-burdened rate.117 One reason is income disparity. For example, the median income for Black households in the Portland area is half the overall median income.118 While calculating additional costs to support people of color was not feasible in the time frame for this study, we want to note that ensuring that supporting these communities may require are living doubled up in other peoples' residences. Integrating these counts produce a more realistic estimate of people experiencing homelessness in the region.
- The numbers for doubled-up populations only include families with children due to limited methodological tools to estimate adults who do not have children living with them. The number of doubled-up individuals is likely higher.
- About 15% of those experiencing homelessness likely need permanent supportive housing.
- We examine three scenarios for providing housing and necessary supports for people experiencing homelessness. Costs over ten years range from \$2.6 billion to \$4.1 billion in net present value to cover housing and services depending on the scenario. Each scenario includes a high cost and low-cost estimate. These estimates are not reduced to account for either housing revenue measure being administered by Metro (Measure 26-199) or the

117 We do not report on Asian & Pacific Islander (API) communities here because they are often not experiencing disparate rates of homelessness. However, the data for the API community is especially problematic. First, the number of APIs in the data set is small, leading to high margins of error. Second, because of the small numbers, we cannot meaningfully disaggregate data to examine rates for API subgroups. However, we know that there are marked differences between API populations in relation to socio-demographic and economic factors, where some populations are likely to experience disparate rates of homelessness.

¹¹⁸ The reason for this income disparity, is of course, the legacy and continuation of structural, institutional, and interpersonal racism.

City of Portland (Measures 26-179). The Metro bond is specifically dedicated to construction, acquisition, and rehabilitation; not services.¹¹⁹

- Services₁₂₀ alone account for about \$825 million–\$910 million of the cost for resolving homelessness over the ten-year analysis period.
- Overall, the region does not have enough affordable housing for households making 0–80% Median Family Income (FMI). Many in this group are cost-burdened, which means they pay more than 30% of their income toward rent. There is an unmet need for affordably-priced units of all sizes. Units are available at higher price ranges (from 30% up to 80% of MFI) in most cases; notable shortages are present in studios and one-bedroom apartments, as well as three or more bedroom units. This means that construction of new units will be necessary to meet those housing needs even with rent assistance. However, if households are permitted to rent larger units than their households might normally be eligible for, the shortage for studios and one-bedrooms disappears.
- Further research is needed to determine whether the spatial distribution and quality of available units is sufficient. Assessing unit quality was beyond the scope of this work; however, we are aware that some of the units counting toward housing inventory may have serious issues. Likewise, previous research demonstrates that low-income households are being displaced to the outer edges of the region. We address this to the best of our ability by using a range of rents that reflect regional variation.
- Supporting low-income (below 80% MFI), cost-burdened households for 10 years would cost between \$10.7 billion and \$21 billion (net present value) for all cost-burdened households (paying more than 30% of their income toward rent). Supporting just the lowincome, severely cost-burdened households (those who pay more than 50% of their income toward rent) would cost between \$8.7 billion and \$16.6 billion.
- Due to the two-pronged nature of this analysis, the rent subsidy value should not be summed with the costs necessary to support individuals experiencing homelessness; see below.

In our analysis we consider three main groups: those experiencing homelessness who would not require permanent supportive housing (PSH), those who would require PSH, and households at risk of experiencing homelessness due to low incomes and paying 30% or more

119 City of Portland Auditor Mary Hull Caballero. (2016). Affordable Housing Bond Measure - 26-179 [web page]. Retrieved from: https://www.portlandoregon.gov/auditor/article/581552; See also: Metro. (2018). Notice of measure election [PDF file]. Retrieved from https://multco.us/file/74022/download.
120 Services include those for PSH and non-PSH households, but do not include rent assistance or building operating costs.

of their income toward rent. These groups, and the resources and associated costs are summarized in Tables 2.1 and 2.2 below. It is important to note that the per-household costs might seem low, but this is because the value is an average of two groups with very different needs: those who need PSH and those who do not. Households in PSH are assumed to have housing constructed and services over the entire period, while those without receive only two years of rent assistance and services in existing housing.121 We know that many homeless households will continue to need some type of assistance beyond two years; however, we were unable to identify a reasonable set of assumptions to calculate the amount of longer-term support necessary. Instead, we include how much it would cost overall for all households to continue to receive the same amount of support for two additional periods.

Permanent Supportive Housing

HUD defines permanent supportive housing as permanent housing with indefinite leasing or rental assistance paired with supportive services to assist homeless persons with a disability, or families with an adult or child with a disability, to achieve housing stability.

Group	Population ₁₂₃	Resources	Costs
		Housing construction and acquisition (one-time cost)	\$190,000-\$218,000 (0-1 bedroom unit) \$190,000-\$338,000 (2-4 bedroom unit)
Total population experiencing homelessness (combined PSH ₁₂₄ and Non-PSH)	38,263 individuals (or 24,260	Rent assistance (per year)	\$11,352–\$18,960 (0–1 bedroom) \$14,904–\$41,000 (2–4 bedroom)
	households)	Rent assistance administration (annual)	\$800 per household
		System support and employment services (annual)	\$450 per household
		Administrative costs (annual)	2.4%

Table 2.1: Summary of Results for Homeless: Housing and Services 122

121 For example, in 2024, expenses per household for those in PSH are \$174,613, and \$41,633 for those not in PSH. The values are similar for 2025, and thereafter the expenses for non-PSH households fall to zero (as our cost modelling provides for two years of rent assistance and services), and with construction complete, PSH costs per household fall considerably as well (reaching just over \$26,000 in 2033, or a total of \$128.7M).

122 For consistency, all data come from 2017.

¹²³ Where possible, we provide individual and household estimates. Some data are collected on an individual basis, other on the household basis. We use household size estimates from the American Community Survey 2017 5-Year Estimates to convert individuals to households as needed.

124 Permanent Supportive Housing: Approximately 15% of the homeless population is assumed to require permanent supportive housing services, and costs for this group are calculated separately from the costs associated with the 85% that does not require these more intensive services.

With Permanent Supportive Housing Need	5,661 individuals (or 4,936 households)	PSH services (annual)	\$8,800–\$10,000 per household
Without PSH Need	32,602 individuals (or 19,324 households)	Services (annual)	\$5,700 per household
Total		\$2.6 billion– \$4.1 billion, or an average of \$107,000– \$169,000 per household (Net present value for ten years)	

Table 2.2: Summary of Results for Universal Rent Assistance (Homelessness Prevention)

Group	Population	Resources	Costs
Cost burdened (spend >30% of income on rent, earn <80% AMI ₁₂₅)	107,039 households (<i>includes severely cost</i> <i>burdened, below</i>)	Universal housing rent assistance	\$10.7 billion - \$21 billion (NPV126, 2024-2033)
Severely cost burdened (spend >50% of income on rent, earn <80% AMII)	82,576 households	Universal housing rent assistance	\$8.7 billion - \$16.6 billion (NPV, 2024-2033)

Limitations

There are several things to keep in mind while reading this section. First, existing rigorous research for some of these topics is limited. Second, data sets about homelessness have limitations, and in some cases we have no data.

Third, these analyses are not iterative or interactive. We assume that rent assistance is successful at limiting people becoming homeless, and that the resources provided are enough, and effective at moving people into housing. In other words, no one else becomes homeless, and everyone exits homelessness. Our goal was to produce a general framing series of estimates to help people understand the scope of the issue. A more complicated analysis would be required to consider realistic timing of bringing new affordable units on line and scaling up services and rent voucher programs, and how these programs would reduce costs of the emergency shelter system. Such analyses would also examine how creating access to more

¹²⁵ Area Median Income: average household income adjusted for family size, as used by US HUD to determine aid thresholds.

¹²⁶ Net Present Value: This report often presents program costs in net present value, which estimates the present value of an investment by accounting for the discount rate (10%) and therefore the time value of money; as well as inflation when appropriate. This method most clearly allows sums to be considered comparatively, at the present time. (Note that nominal cash, or cash in the year in which it is used, is often presented as well.)

housing would affect the housing market overall. These analyses were beyond the scope of this work.

Fourth, based on current practices there are limited methods for assessing how addressing racial equity may increase costs. We draw attention to the significant inequities several communities of color experience. Further research will help demonstrate if that type of work translates into significant additional costs.

Lastly, the costs presented in the table above and throughout *may not be aggregated to arrive at a single number*. For example, households not requiring permanent supportive housing are assumed to receive two years of rent assistance and services and then exit the system and the cost scenario. However, they might end up requiring the type of housing voucher discussed for the at-risk group, which would increase that estimate, as only housed individuals are considered in that group at this time. Another example: previous work by local consultant ECONorthwest found that housing unaffordability is a major driver of homelessness.¹²⁷ If vouchers were used to make such housing affordable, then the number of homeless individuals would be much lower. Presumably the non-PSH group would likely move from homeless to the at-risk-category receiving rent assistance, requiring fewer interventions. These estimates are meant to be considered separately, not added together, because of the complex interactions that would result if these policies were deployed simultaneously: the entire landscape from which the data used in this report was drawn would shift in ways that fall beyond the scope of this assessment.

Homelessness and other Key Terms

Different organizations and institutions use varying definitions of homelessness, adding an additional level of complexity to already complicated datasets. As discussed in the introduction, the federal government lacks a unified definition of homelessness. The HUD definition of homelessness focuses on people living unsheltered or sleeping in a place not designed for sleep, living in shelter designed to serve people without permanent housing, people who will lose their housing, and some additional types of unaccompanied youth and families. HUD has also changed their definitions of homelessness as well as specific subtypes of homelessness over the years.¹²⁸

https://m.oregoncf.org/Templates/media/files/publications/homelessness_in_portland_report.pdf 128 Signed into law in 2009, the HEARTH Act reauthorized the McKinney-Vento as and included substantive changes to the homelessness definition (among other things).

In 2012, a final rule offered additional substantive definitional changes for what constituted homelessness. The definition for chronic homelessness was changed yet again in 2015. For a discussion about the differences in definitions, and the supporting federal statutes, see: U.S. Department of Housing and Urban Development [HUD]. (n.d.). *Homeless Emergency Assistance and Rapid Transition to Housing Act.* Retrieved from https://www.hudexchange.info/homelessness-assistance/hearth-act/.

¹²⁷ ECONorthwest. (2018). *Homelessness in the Portland region: A review of trends, causes, and the outlook ahead* [PDF file]. Retrieved from

For the purposes of this report, the major way in which homelessness definitions vary is whether or not an organization defines homelessness as including people living doubled up with family or friends due to loss of housing or economic hardship. In this report, we define homelessness to include people living doubled up. Including doubled up populations is particularly important for racial equity as communities of color often experience homelessness in this way. As explained in the introduction of this report, all the categories come with specific conditions, and subcategories with additional criteria.

Additional terms that have multiple meanings include permanent supportive housing, support services, and supportive affordable housing. Traditionally, permanent supportive housing referred to providing housing and supportive services for those experiencing chronic homelessness and people with severe mental illnesses experiencing homelessness (this includes addiction services). The most commonly known model that has demonstrated effectiveness at moving and keeping people without stable housing into housing is known as Housing First.

As the word "permanent" implies, this model assumes that some people may need access to support services for their lifetime. Ideally as people become more stable in housing, the degree and intensity of supportive services will decrease, and for some will disappear altogether. Keep in mind that some people develop addictions and mental illness while living as homeless. In this instance, the model indicates that intense services at the beginning and no-barrier housing could result in a person managing/in remission/etc. from their addiction.

In Portland, local government, practitioners, and advocates have argued for expanding PSH and the concept of support services more broadly. First, permanent supportive housing models are based on research with individuals experiencing homelessness. Portland is applying this concept to families who also need permanent supportive services. Second, support services means services that people may not need permanently (such as medical care for chronic illness), but do need shorter terms services to support moving forward. Examples include job training, etc.

In this report, we follow Portland's lead in using PSH to include individuals and families in need of PSH and to ensure inclusion of support services for all people experiencing homelessness.

Understanding Homelessness in the Portland Tri-County Region

There have been a number of reports assessing homelessness in the region in recent years. We summarize the most salient ones that pertain to the cost estimates of the study.

Point-In-Time (PIT) Reports

In order to receive federal funding, local areas termed Continuums of Care (CoCs) must conduct "Point-in-Time" Counts (PIT) of all homeless individuals and families in their jurisdictions at least every two years. These counts must take place during the last 10 calendar days of January. The count occurs over a single night. The required PIT Count requires a census-style count of people living unsheltered, in emergency shelter, or in transitional shelter.

Some jurisdictions also report a doubled-up count that come from a range of sources, and in the case of Multnomah County are provided by school homelessness liaisons. The doubled-up data provided by schools for PIT Counts are not the same data required for annual homelessness reporting for the schools. The doubled-up counts, meaning individuals living with friends or family for economic reasons (e.g. someone living on a friend's couch) are usually based on annual surveys of schools. This is separate from the annual school data reported (which is what we used for our analysis). The PIT Count Figure 2.1 combines results from the most recent PIT Count reports for Multnomah, Washington, and Clackamas Counties. Remember changes in definitions make data not perfectly comparable.

Figure 2.1: Timeline of PIT Counts Estimate in Clackamas, Multnomah, and Washington Counties by Housing Situation

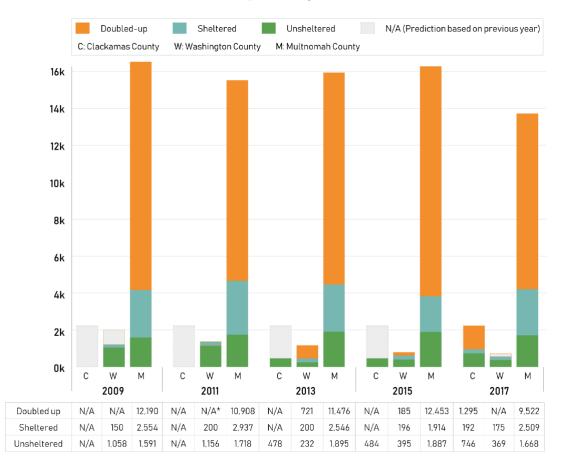
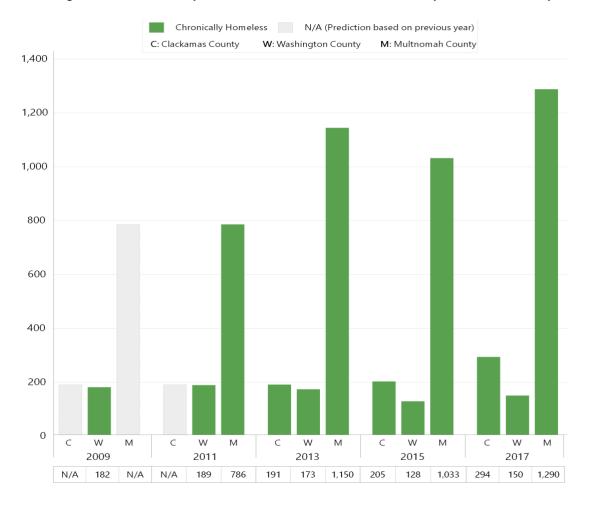


Figure 2.2 shows the number of chronically homeless individuals¹²⁹ in each county by year. Changes in methodology mean that these numbers are not always directly comparable from year to year. Note that methodologies for conducting the PIT Count may differ between counties as well.





129 A chronically homeless individual is one who has experienced homelessness for at least one year, or who has experienced four episodes of homelessness over the previous three years totaling one year, and who has a disabling condition (Department of Housing and Urban Development, 2018 Annual Homeless Assessment Report to Congress).

Reports from the Oregon Department of Education

As required by federal statute, Oregon public school districts employ student liaisons who identify and provide direct support to students experiencing homelessness, and their families. Records kept by school districts on homeless students are a valuable resource, above and beyond the PIT Count, to track child homelessness, especially as they use a different methodology (and therefore can capture students who may not be counted in the census-style PIT); and are done namely through individual identification by teachers and liaisons. Figure 2.3 shows the number of homeless students by housing situation and county in the 2017-2018 academic year.¹³⁰

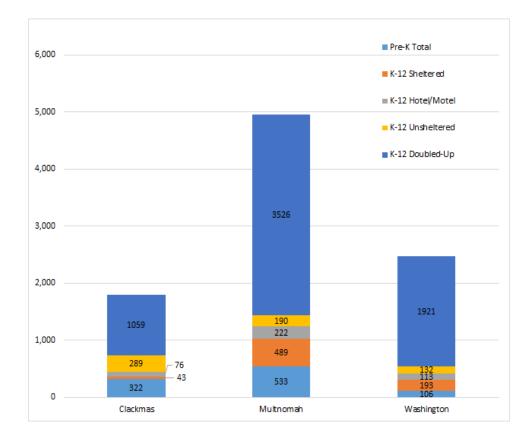


Figure 2.3: School District Homeless Students by County and Housing Situation, 2017-2018 Academic Year

130 Oregon Department of Education. (2018). McKinney-Vento Act: Homeless Education Program [web page]. Retrieved from: https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/McKinney-Vento/Pages/default.aspx

Reports from the Corporation for Supportive Housing (CSH)

Over the last two years, CSH has produced two reports assessing Portland's supportive affordable housing. The first, released in September of 2018, is titled *Scaling Smart Resources, Doing What Works: A System-Level Path to Producing 2,000 Units of Supportive Housing in Portland and Multnomah County*, and used an approach combining stakeholder input, data analysis, and a review of best practices to produce a plan that can close the supportive housing gap in Portland. Costs total \$592 million to \$640 million over the first ten years, with annual investments of \$43 million to \$47 million thereafter for building operations and service costs.

The second CSH report, titled *Tri-County Equitable Housing Strategy to Expand Supportive Housing for People Experiencing Chronic Homelessness* and released in February 2019, expands the analysis to include the entire Metro area, while focusing on chronically homeless individuals. Additionally, the report models costs for supportive housing, in order to show the savings feasible under the required investment: a chronically homeless individual imposes an average annual cost, via use of public systems, that is nearly double the cost of providing supportive housing services. Units are distributed between counties according to need, and total costs over a ten-year period are \$923 million to \$998 million.

Addressing Housing Needs for Population Experiencing Homelessness

In this section, we estimate ranges of costs to provide housing and supportive services (temporary and permanent) to the population experiencing homelessness in the tri-county region (Clackamas, Multnomah, and Washington Counties). We start with the various counts of the total population without housing (including sheltered, unsheltered and doubled-up individuals) to create a reasonable estimate of people experiencing homelessness in 2017. We then estimate the number of people who will need permanent supportive housing (PSH) and the number of people who do not need PSH. Based on assumptions of families and household sizes, these numbers are then converted into numbers of households (family and individual households). Costs of housing provision (including capital and ongoing operating costs), service provision and administrative costs are estimated on a per household basis. Finally, we calculate a range of costs to provide housing to the homeless population based on several scenarios with different assumptions.

Assessing the true size of the homeless population is a tremendous challenge due to limited data. It is difficult to determine the population of a group that is not consistently engaged with public systems, is constantly in flux as individuals enter and exit homelessness, and lacks stable residential addresses (some non-profits will receive mail for their clients). Snapshot counts, such as the widely-used PIT Count cited below, miss individuals living doubled up as well while other methods require that households and individuals access services in order to be counted—services that are constrained by budgetary and staffing levels to assist only a certain number, and are rife with institutional and implicit biases. Stakeholders and entities engaged in working with

the homeless and financially disadvantaged population express that they are not able to assist every family and individual who requires their services. Further not all nonprofits providing services participate in government system data tracking. Based on in-person interviews, we know that at least some individuals will not show up in the government reports, and we have no way to account for their services. In short, counts derived from service provision can be assumed to be low as well.

At the same time, there is no central database shared among the data collectors, so it is possible for households and individuals to be counted multiple times. Lacking a cohesive central database across the region and consistent long-term definitions and reporting methods, this challenge is likely to continue.

With these things in mind, note that all counts presented in the below sections must be considered educated guesses. It is possible to state precise individual numbers from the datasets we used, (i.e., "The 2017 PIT records 1,668 unsheltered individuals in Multnomah County") but it is not possible to state the exact number of households (a category not often used in counts) and overall individuals experiencing homelessness in the Portland tri-county area. This report takes the most straightforward approaches possible to estimate an overall count, rather than adding assumptions to assumptions in an attempt to zero in on a degree of precision that is not realistically achievable regardless of the amount of data points or statistical technique.

When estimating the costs we have tried to be as consistent with other reports as possible. Unfortunately with several of the reports, precise methodologies were not possible to locate. Further, where we were able to identify assumptions, we found that some of those assumptions are also best educated guesses based upon available data and stakeholder input. If we found new research, or new thinking by some of those same stakeholders, we changed assumptions. This still means that our calculations are also not precise in a way you might see in other types of studies, and are best used as an educated and informed estimate. Our work here is to help people in the Portland region understand the magnitude and scope of the affordable housing and homelessness challenges we face.

Our most important deviation from other reports about homelessness is a definition of homelessness that includes doubled-up populations. This definition is consistent with other federal agencies such as the Department of Education, and with A Home for Everyone, the inter-jurisdictional initiative to address homelessness within Multhomah County.

Population Experiencing Homelessness in 2017

In order to estimate the costs of providing housing to the population experiencing homelessness, we estimate the size of that population in the tri-county region. This estimate utilizes several data sources discussed in the previous section of this report, including the biennial Point-in-Time (PIT) counts, annual homelessness assessment reports (AHAR) along with related reports provided by each Continuum of Care (CoC) to HUD, and annual Oregon Department of Education counts of homeless children and youth. Table 2.3 below summarizes

the various homeless population counts from these data sources in calendar year 2017 or fiscal year 2017.

	2017 P	oint-in-Time	(PIT)	2017 PIT		2016-2017
	Unsheltered	Sheltered	Doubled Up	Chronically Homeless	FY 2017 Annual Homelessness Assessment Report1	Oregon Dept of Education Homeless Children & Youth2
Clackamas	746	192	1295 ₃	294	723	1789
Multnomah	1668	2509	95224	1290	11648	4960
Washington	369	175	5778 ₅	150	764	2465
 Annual Homelessness Assessment Reports (AHAR) are reports to HUD and include unduplicated individuals served in emergency shelters (ES) or transitional housing (TH) between 10/1/2016-09/30/2017. Oregon Dept of Education counts includes both Pre-K and K-12 homeless populations. Within the K-12 homeless population, the number is further broken down into sheltered, doubled up, hotel/motel and unsheltered counts. 						

Table 2.3: Homeless	Population	Data Summary	2017
	i opulation	Data Guiminary,	2017

3 Clackamas County doubled up population includes 385 people counted as living in doubled up or unstable housing, and 910 children in the same situation (counted by Homeless School Liaisons).

4 Multhomah County doubled up population (reported in the 2017 Multhomah County PIT Report) is based on the Dept of Education doubled up population and household size assumptions (by school district).

5 The Washington County doubled up population was not reported in its 2017 PIT report. We estimate this number by using the Dept of Education Pre-K homeless, K-12 doubled up and K-12 hotel/motel (equal to 2,140), and assuming an average household size of 2.7 (2017 ACS 5-year averages for Washington County).

We used these data sources to help calculate the total homeless population for the purpose of estimating the range of costs to provide housing for the entire population, including all unsheltered homeless, sheltered homeless (in emergency shelters or transitional housing), and all doubled-up individuals. The AHAR counts of individuals served in emergency shelters (ES) and transitional housing (TH) and the doubled-up population estimates are annualized estimates (accounting for all individuals who might have experienced homelessness during the year), while the PIT Counts are snapshot estimates. Two main adjustments are applied to the data as follows:

• An annual extrapolation factor of 1.9₁₃₁ was applied to convert the snapshot unsheltered homeless PIT Counts into an annualized unsheltered estimate. This is a low extrapolation factor, selected because of its use by the Multnomah County Joint Office of Homeless Services. A 2001 attempt arrived at extrapolation factors ranging from 2.5 up to as high as 10.2, meaning that our numbers may be low (although it is important to note that the level of services available is an important determinant; in areas with more awareness and services a lower number is more appropriate).132

131 This factor was used in JOHS's calculations to annualize street PIT Counts, and is the factor used in the Rapid Results Institute program.

132 Metraux, S., Culhane, D., Raphael, S., White, M., Pearson, C., Hirsch, E. & Cleghorn, J. S. (2016). Assessing homeless population size through the use of emergency and transitional shelter services in 1998: Results from the analysis of administrative data from nine US jurisdictions. Public Health Reports. Clackamas County and Multnomah County utilized different estimation methodologies to calculate the total doubled-up population reported in their PIT reports. To be consistent across the tri-county region, we use the Department of Education Pre-K homeless, K-12 doubled-up and K-12 hotel/motel counts (last column of Table 3.1 above) for each county, multiplied with the county average household size (2017 ACS 5-year averages) to estimate the doubled-up population for the purposes of our cost estimates.¹³³

Because our doubled-up data is derived from schools, it does not include doubled-up individuals who are adults, aside from those with children. Adults who are temporarily cohabiting with friends and family due to financial hardship are not represented in our data at all, and it is known that the size of this population is fairly significant: the 2011 American Housing Survey found 25 million individuals living with relatives who were not their spouses or children, 11.5 million living with nonrelatives, and 3.6 million households with more than one family in them (541,000 of which were not related) nationwide.¹³⁴ We assume not all of these are voluntary arrangements, and the AHS may not be including adults who are not able to live on their own but whose friends and families decide not to turn them out. The best data available at the time of writing was that from schools, and it seems likely that families with children are more likely to cohabit out of necessity rather than choice, so we use the referenced schools' data, but offer it with the caveat that it by definition represents a subsection of the actual doubled-up population.

These homeless population estimates are summarized in Table 2.4, totaling 38,263 homeless individuals in the tri-county region.

	FY2017 AHAR Count (ES & TH)	2017 Unsheltered PIT x Annual Extrapolation Factor	FY2017 Doubled-Up Estimate	Total Estimated Homeless Population
Clackamas	723	1,417	3,788	5,928
Multnomah	11,648	3,169	10,274	25,091
Washington	764	701	5,778	7,243
Total	13,135	5,287	19,840	38,263

Table 2.4: Homeless Population Estimates, 2017

133 People can sometimes inexpensive lodging at low cost motels. Motels usually do not include access to a kitchen, and are not considered permanent housing.

134 U.S. Department of Housing and Urban Development [HUD]. (2011). American housing survey reveals rise in up households during recession. *PD&R Edge*. Retrieved from: https://www.huduser.gov/portal/pdredge/pdr_edge_research_012714.html

Homeless Individuals with Permanent Supportive Housing (PSH) Need

We further break down the estimate of the total population experiencing homelessness into two categories—those who need permanent supportive housing (PSH), and those who do not need PSH. The Corporation for Supportive Housing (CSH)'s 2018₁₃₅ report to the Multhomah County Board of Commissioners and Portland City Council estimates that 90% of individuals experiencing chronic homelessness and 10% of all households experiencing homelessness will need permanent supportive housing (pg. 11).

Following consultation with local experts, we received conflicting advice about whether these estimates for PSH could be applied to the doubled-up population. Some stated that this rate would be lower for doubled-up populations based on a belief that many people who require PSH do not cohabit successfully. However, others countered that because we actually know so little about the doubled-up population we have no idea how many people may be able to survive doubled-up and have families and friends taking risks to house them.

We reviewed the available academic literature, of which there was little, consulted with a research psychologist, and examined national rates of disabilities that qualify for PSH (including mental illness, drug or alcohol use disorders, or physical and cognitive disabilities).^{136, 137} We found no estimates about PSH rates for doubled-up populations, and decided that we would apply the ratios CSH identified for HUD defined homelessness to our broader definition that includes doubled-up populations.¹³⁸

In the interest of simplicity we follow a similar methodology and estimate that the homeless population with PSH need is the sum of:

(i) Current homeless population with PSH need:
 90% of chronically homeless population (2017 PIT Counts) = 1,561

135 CSH. (2018). Scaling smart resources, doing what works: A system-level path to producing 2,000 units of supportive housing in Portland and Multnomah County [PDF file]. Retrieved from: http://ahomeforeveryone.net/s/CSH-Supportive-Housing-Report_Sept7_FINAL.pdf 136 National Institute of Mental Health. (2019). Mental illness. Retrieved from

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https://www.nimh.nih.gov/health/statistics/mental-illness.shtml
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137 Estimates for people who have disabilities that qualify for PSH are difficult to find as eligibility requires both a medical diagnosis and that people demonstrate that the "disability must also be of long and continuing duration, substantially impede the program participant's ability to live independently, and be improved by the provision of more suitable housing conditions." NIMH estimates that 4.5% of the adult population has a serious mental illness (https://www.nimh.nih.gov/health/statistics/mental-illness.shtml). Estimates of drug or alcohol use disorders vary. One study, funded by NIH, found that 10% of adults had a drug disorder in their lifetime, and 30% had an alcohol disorder (https://www.nih.gov/news-events/newsreleases/10-percent-us-adults-have-drug-use-disorder-some-point-their-lives). National estimates for physical, intellectual, and emotional disabilities were not easily accessible, and where they were located, it was not possible to tell which might prevent independent living.

¹³⁸ We would like to note that CSH does not agree with this decision "because they do not have data nor have they done the analysis to support it" (personal note 8/5/2019).

Portland State University

10% of total estimated homeless population (Table 2.4) = 3,653139

To estimate the population of those who returned to homelessness after being in permanent supportive housing, we examine retention rates for this population. The rate of return to homelessness after exiting from permanent supportive housing within two years is reported at 3% in Clackamas County, 26% in Multnomah County and 9% in Washington County (HUD SPM 2017 reports). A Home for Everyone's (AHFE) FY2017 report cites 26% who are not confirmed still in housing after 12 months of their permanent housing placement. Because these retention numbers may include both those served in PSH and RRH (rapid re-housing) and are highly dependent on the ability to establish contact with this population after a certain period of time, we further obtain annual performance reports (APRs) from the three counties to estimate more accurate retention rates. We find a weighted average retention rate140 of approximately 92.15%, which means that 7.85% of those previously served in PSH return back to homelessness.

(ii) PSH inflow from reentry (estimated population of those who were previously served in PSH, but returned to homelessness) = 5,691 x 7.85% = 447

The estimated population lacking housing who need PSH in the tri-county region is equal to 5,661 individuals, about 15% of the total population experiencing homelessness.

Households Experiencing Homelessness

In order to estimate the costs of providing housing to the population experiencing homelessness, we estimate the number of homeless households, or amount of housing units needed, from the total homeless population estimate. We separately estimate the number of households for the homeless population with PSH need and the homeless population without PSH need.

Homeless Households with PSH Need

While FY2017 AHAR reports indicate that 38.7% of the chronically homeless population (which comprises a large component of the homeless population with PSH need) served in PSH were in families, the 2017 Multnomah County PIT Count showed that 3.9% of those chronically homeless are in families. This differential suggests that more PSH-related services are targeted toward families than individuals, meaning that the AHAR percentage may be biased to be higher than the actual number of families within this population. At the same time, expert consultation

139 Ninety percent of the chronically homeless population (1,734) is equal to 1,561. Ten percent of the remaining homeless population is determined using the total number of homeless (38,263) less the chronically homeless (1,734), a tenth of which is 3,653 (rounded).

140 We utilized three alternative measures to calculate the retention rate using the APR data from each county (all of the following are calculated as a percentage of the total number of people served in PSH): (1) those who stayed in PSH; (2) those who stayed in PSH or exited to a permanent destination; (3) those who did not exist to a temporary or unknown destination. The weighted average retention rate is weighted by number of individuals served in PSH in each county.

indicates that the PIT undercounts families. We concluded that it is reasonable to split the difference, and use 21.35% to estimate the number of family households with PSH need:

- (i) Family households with PSH need = $5.661 \times 21.35\% / 2.5 = 483$ family households
- (ii) (Note: We assume an average household size of 2.5 persons in the tri-county region using the 2017 ACS 5-year estimates.)
- (iii) Individual households with PSH need = 5,661 x 78.65% = 4,452 individual households (Note: an "individual household" is a household consisting of a single individual who resides alone.)

The estimated homeless households with PSH need in the tri-county region is equal to 483 family households and 4,452 individual households, totaling 4,936 households with PSH need.

	FY 2017 AHAR Numbers Served in PSH				
	People in	People in People not in Family			
	families141	families	Percentage		
Clackamas	163	178	47.8%		
Multnomah	1888	2958	39.0%		
Washington	154	350	30.6%		

Table 2.5: Number of People Served in PSH by Families/Non-families (Source: FY 2017 AHAR)

Homeless Households without PSH Need

The 2017 PIT reports from the three counties reported that 15% to 37.5% of the homeless population are in families. We use school data, where nearly all households are families (as the data points are children, typically accompanied by one or both parents). For simplicity we assume that all 19,840 doubled-up homeless are in families. We follow the CSH (2019) study in assuming that the 19% of the remainder of the homeless population are in family households (which is in line with the 15-37.5% range found in the PIT counts, here applied to the PIT and AHAR data). Recall that the 2017 AHAR report found 13,135 homeless individuals, and the 2017 PIT Count found 5,288. Therefore, the number of family and individual homeless households without PSH need can be found as follows:

- Doubled-up households= 19,840 individuals / 2.5 = 7,936 family households; Individuals in families (AHAR, PIT) = (13,135 individuals + 5,288 individuals) x 19% / 2.5 = 1,400 family households
- (ii) Family households without PSH need (AHAR, PIT): 1,400 family households 483 family households with PSH need = 917 family households
- (iii) Total family households without PSH need = 7,936 family households (doubled up) + 917 family households (AHAR, PIT) = 8,853 family households
- (iv) Individual households (AHAR, PIT) = (13,135 individuals + 5,288 individuals) x 81% = 14,923 individual households.
- Individual households without PSH need: 14,923 individual households (AHAR, PIT) 4,452 individual households with PSH need = 10,471 individual households

141 People in families = number of people in families.

The estimated homeless households without PSH need in the tri-county region is equal to 8,853 family households and 10,471 individual households. This totals 19,324 households without PSH need.

Cost Assumptions

The costs of providing housing to people experiencing homelessness can be divided into two essential categories: the cost of providing housing units (via development or acquisition) and the costs of services and administration.

Costs of Housing Provision

To meet the housing needs of those currently experiencing homelessness, public agencies and private organizations can choose to: build new housing units, acquire existing units, rehabilitate existing housing, or privately lease housing units on the rental market. Developing, acquiring, or rehabilitating housing units usually entails higher upfront capital costs, but have lower ongoing operating costs. The private lease of housing units entails costs that are more evenly spread through the analysis time periods (CSH, 2019).142 However research has demonstrated that leasing units in the private market may lead to landlords charging more rent and lease units at higher rates than their quality warrants.143

Because rents vary considerably by neighborhood in the Portland region, we included a range of rents for consideration. Our goal here was to create estimates that would not imply the concentration of available units in just one area of the region (i.e., primarily in the outskirts of the region and lower-cost neighborhoods). A healthy community has a range of housing types and costs, and we used a range of rents to help encourage that.

Table 3.4 summarizes the housing cost assumptions below (page 76).

The costs of developing housing units, including new construction and rehabilitation, mainly follow the vetted assumptions from the CSH (2018 and 2019) reports (based on "actual costs reported by PHB and approved by stakeholder advisory groups"). The only adjustment comes from the Metro Affordable Housing Bond Program Work Plan (2019) and Regional Housing Bond Financial Modeling Summary Memorandum (2018). These sources peg the average construction cost of housing units at \$215,000 (a weighted average for all housing unit sizes),

¹⁴² Per CSH 2019 p. 23: "Because the ongoing costs of providing rental assistance for private market units is greater than the annual operating costs of newly constructed supportive housing units, the total cost of leasing supportive housing units in the private rental market becomes significantly more expensive in the long run than building new units. Using the cost and inflation assumptions above, the ongoing cost of newly developed units becomes lower than the cost of leased units in year 30 for studio and onebedroom units and in year 23 for two and three-bedroom units."

¹⁴³ Desmond, D, & Perkins, K. (2016). Are landlords overcharging housing voucher holders. *City and Community*, (15), 137-162.

and the cost of rehabilitation of existing units at \$190,000 (including \$150,000 building acquisition cost and \$40,000 rehabilitation cost, all in 2018 dollars). CSH (2018) estimates that annual operating and maintenance costs run between \$6,000 and \$8,000 per unit. This range is similar to Portland area annual expenses reported by Multifamily NW's The Apartment Report (Spring 2019), which estimates a cost of \$6.01 to \$7.36 per square foot (a similar result when factoring in unit size). Note that these operating costs only pertain to the maintenance and operation of the buildings themselves, and do not include any additional support services that may be provided. Support service costs are estimated elsewhere.

We examined three main data sources to estimate market rents in the tri-county region: the FY 2017 HUD Fair Market Rent (FMR) for the Portland-Vancouver-Hillsboro, OR-WA MSA₁₄₄, 2017 Portland State of Housing Report₁₄₅, and FY 2017 HUD Hypothetical Small Area Fair Market Rent₁₄₆ for all regional zip codes. To avoid underestimation of rental prices, we pulled out both average rents by bedroom for the City of Portland and the maximum rent by bedroom from the individual neighborhood estimates in the Portland State of Housing Report. We also identified the maximum fair market rent in all zip codes covered by the HUD Hypothetical Small Area FMR document. Table 2.7 summarizes these rental prices, which are also generally consistent with the overall average rents reported in the MultiFamily NW (Spring 2019) report.

The ranges of annual rent assistance specified in Table 2.6 are the average and maximum annual rents for individual housing units (0 to 1 bedroom)₁₄₇ and family units (2 to 4 bedrooms) calculated from prices in Table 2.7. (For example, cost ranges for individual units are estimated using the average value of \$946 and the upper-end value of \$1,580 per month, for annual costs of \$11,352 to \$18,960. The information in these tables assume that 100% of the cost is paid on behalf of the renter, unlike rent calculations for housing rent assistance later in the report.)

Development of Housing Units				
Individual Units (0-1 bedroom)	\$215,000 - \$218,000 one-time cost per unit			
Family Units (2-4 bedrooms)	\$338,000 one-time cost per unit			
Rehabilitation of existing units	\$190,000 one-time cost per unit			

Table 2.6: Costs of Housing Provision (development vs. private lease), 2017

144 U.S. Department of Housing and Urban Development [HUD]. (2017). Fair market rents [web page]. Retrieved from https://www.huduser.gov/portal/datasets/fmr.html#2017_data

145 Portland Housing Bureau. (2017). *State of housing in Portland.* Retrieved from https://www.portlandoregon.gov/phb/article/681253

146 U.S. Department of Housing and Urban Development [HUD]. (2017). *Small area fair market rents:* FY2017 hypothetical small area FMRs. Retrieved from

https://www.huduser.gov/portal/datasets/fmr/smallarea/index.html#2017

147 0 bedrooms is a studio.

Operating Costs (annual)	\$6,000–\$8,000 per unit per year			
Private Lease of Housing Units (rent assistance, annual)				
Individual units (0-1 bedroom) \$11,352–\$18,960 per unit per year				
Family units (2-4 bedrooms)	\$14,904–\$41,000 per unit per year			

Table 2.7: 2017 Tri-county Region Rental Price Summary, monthly

	0 bed	1 bed	2 bed	3 bed	4 bed
2017 HUD FMR	\$946	\$1,053	\$1,242	\$1,808	\$2,188
2017 Portland State of Housing Report					
City Average	\$1,130	\$1,350	\$1,599	\$1,717	\$1,975
Neighborhood Average Max	\$1,271	\$1,546	\$2,431	\$2,971	\$3,417
2017 HUD Hypothetical Small Area FMR					
Zip Code Max	\$1,420	\$1,580	\$1,860	\$2,710	\$3,280
Note that we estimated 4 bedroom units to cost 15% more than 3 bedroom units for the Portland State of Housing Report numbers as this report does not include averages for more than 3 bedroom units.					

Cost of Services and Administration

The cost of services can vary significantly depending on the challenges and conditions that each household encounters, and administrative costs also vary in relation. We identify five categories of costs for services and administration. Some of our estimates may include limited overlaps across categories as we drew from different data and estimate sources. We sought to avoid overlap as much as possible.

1. Overall system support, employment services = \$450 per year per household

We estimated this cost using costs spent in these two areas according to the Multnomah County Homeless Services System Program Spending Dashboard (FY 2014–FY 2017)₁₄₈ in Fiscal Year 2017 and divided by the number of people served. The system support category in this dashboard consists of "programs that support the entire homeless services system, including administrative costs, information and referral, research and evaluation and benefits recovery programs." Employment services, according to the dashboard, consists of "programs connecting employment and housing resources for individuals and families experiencing homelessness." While this cost category covers a wide range of general and employment services provided to homeless households, our discussions have highlighted that these services may not be provided at an adequate or efficient level due to funding or programmatic limitations.

2. Services for homeless households <u>with</u> PSH need = \$8,800 to \$10,000 per year per household

CSH (2018 and 2019) estimated annual supportive service costs for homeless households with PSH need to be \$10,000, which reflects "the cost of tenancy support services at a ratio of one case manager to 10 clients for scattered site and one case manager to 15 clients for single site. This figure also includes flexible service funding for people with specific needs not covered by community-based and Medicaid-paid services including additional mental health care, substance use treatment and children's services." Using the Multnomah Spending Dashboard expenses targeted toward the chronically homeless population (who often have PSH needs), we estimate the low-end value service costs to be approximately \$8,800, including services categorized in the "Supportive Housing" and "Housing Placement and Retention" general program areas.

- 3. Services for homeless households <u>without</u> PSH need = \$5,700 per year per household While higher levels of services are typically provided to households with PSH need, homeless households without PSH may also require services. This is estimated by taking all costs categorized in "Supportive Housing" and "Housing Placement and Retention" divided by the number of people served (from the Multnomah County Spending Dashboard and internal county documents provided to NERC).
- 4. Administration cost for system = 2.4% of all service costs

We estimated the administrative costs to oversee the system of providing PSH housing and non-PSH housing as well as associated services. In the absence of an operational system as described that covers the tri-county area, we utilized the administrative costs of the Joint Office of Homeless Services (JOHS) as a proxy. In FY 2017, the administrative costs of JOHS were \$1.8 million, with a total service cost of \$83.8 million. Note these administrative costs do not include the costs of individual programs, agencies or organizations that serve the homeless population, but rather the umbrella organization(s) that oversee and operate the system as a whole. Additionally, several stakeholders expressed concern that this number was an underestimation.

 Administration cost for rent assistance = \$800 per household per year Home Forward, Portland's housing authority, estimated that administrative costs were approximately \$800 per household for their Short Term Rent Assistance (STRA) in FY 2017.

Cost Scenarios & Results

In order to estimate the total costs to provide housing to the homeless population, we make a few more financial and scenario assumptions:

• Annual inflation rate = $2\%_{149}$

¹⁴⁹ Federal Reserve Bank of Philadelphia. (2019). Short-Term and Long-Term Inflation Forecasts: Survey of Professional Forecasters. Retrieved from https://www.philadelphiafed.org/research-and-data/real-time-center/survey-of-professional-forecasters/historical-data/inflation-forecastes

- Annual inflation for construction costs = 6% (CSH, 2019)
- Annual nominal discount rate = 3%
- Time frame for analysis = 2024 to 2033 (10 years)
- Capital costs for public development of housing units occur in 2024 and 2025 (50% in each year)₁₅₀

We also assume that for each homeless household with PSH need, that these households are housed in a combination of public development, which may be new construction or acquisition and rehabilitation of existing units, and/or private lease of rental units. Public development is assumed to occur in years 2024 and 2025, and private lease of rental units are assumed to start in year 2024. We also assumed that these housing units are provided in conjunction with supportive services, which begin as soon as the households are housed.

For each homeless household without PSH need, we assume that these households would be housed through private lease of rental units on the market (via rent assistance) for an average of two years with associated services.^{151,152} Currently, data for federal or regional rental assistance programs do not provide appropriate guidance for the length of time that households may need rent assistance or supportive services, as many of these programs are limited by the amount of funding or other eligibility requirements.¹⁵³

Table 2.8 details the high and low-cost estimates for housing and services as well as supports and administration costs used to create the cost scenarios. Table 2.9 shows the cost scenarios of providing housing to homeless populations at net present value. For example, Scenario 2 would include 70% public development (developed in 2024 and 2025) and 30% private lease for PSH households with supportive services through 2033, as well as two years of private lease and services for non-PSH households experiencing homelessness with high- and low-cost estimates.

150 While construction will not take place over two years, it makes essentially no difference to the final results of the cost modelling in this case. For that reason, and to make our process as simple and straightforward as possible, we assume two-year construction period. Similarly, any units constructed could be used for households that do or do not need PSH. Their designation as new units was only for simplicity, and consistently with other reports.

¹⁵¹ We make this assumption for simplicity. While the housing gap analysis portion of this report provides some insight into how many units of which types might need to be constructed, arriving at a value suitable for inclusion at this point requires analysis beyond the scope of this report.

152 Gubits, D., Shinn, M., Wood, M., Brown, S. R., Dastrup, S. R., & Bell, S. H. (2018). What Interventions Work Best for Families Who Experience Homelessness? Impact Estimates from the Family Options Study. *Journal of Policy Analysis and Management*, 37(4), 835-866.

153 Some programs with two-year end dates will allow for renewal; others are more stringent with the 24month termination date. We chose to use a two-year funding period for the analysis to be consistent with HUD's short-term rent assistance program requirements. Each additional 24-month period would add approximately \$1.5 billion - \$1.6 billion to the NPV cost.

	Low	High
Development/Acquisition of housing units (one-time)		
Individual units (0-1 bedroom)Family units (2-4 bedrooms)	\$190,000	\$218,000 \$338,000
Operating costs (per year)	\$6,000	\$8,000
Private lease of housing units (rent assistance) (per year) Individual units (0-1 bedroom) Family units (2-4 bedrooms) 	\$11,352 \$14,904	\$18,960 \$41,000
Service cost for homeless households with PSH need (per year)	\$8,800	\$10,000
Service cost for homeless households without PSH need (per year)	· · · · · · · · · · · · · · · · · · ·	
Other system support and employment services for all homeless households (per year)	\$4	-50
Administrative costs154 (per year) For all services For administration of rental assistance	all services 2.4%	

Table 2.8: High and Low-Cost Estimates for Scenario Analysis

Table 2.9: Cost Scenarios for Housing Homeless Populations in Net Present Value (2019 dollars)

	Housing options (development vs. lease cost scenarios)	Additional costs	Low Cost	High Cost
Scenario 1	100% public development	services, rent assistance,	\$2,975,323,364	\$4,100,532,252.5
Scenario 2	70% public development and 30% private lease	operation, administration costs	\$2,774,792,311	\$ 4,092,731,516
Scenario 3	50% public development and 50% private lease	(2 years for non PSH and 10 years for PSH)	\$2,589,051,959	\$ 3,921,826,474

Table 2.10 (p. 78) provides additional details of all cost estimates by cost category, expressed in nominal dollars of the year that the expense is occurred. Note that the first two years of costs

154 Note that we received feedback that these rates were likely too low; however, we were not able to conduct additional research to produce a better estimate.

are high compared to ongoing costs due to the upfront capital costs associated with the public development of housing units, as well as due to the assumed two years of rent assistance and services that are provided to homeless households without PSH need. Because administrative costs are directly proportional to the service costs, they are also higher in the first two years of the cost analysis.

Additional Considerations

While the HUD homelessness definition includes individuals who will soon exit or have recently exited temporary institutions, such as those in the criminal justice and mental health system, our cost estimates do not include these populations. Data do exist for these groups, but they are small in terms of absolute size when compared to the overall homeless population. Additionally, concerns about overlap and likely demographic and household differences indicate that inclusion at this stage is not appropriate.

In addition, one major concern for homeless assistance programs is a low prevailing wage. Many individuals who work in necessary roles to assist with basic and social services (which are generally employed by non-profit organizations, contracted by local government agencies to provide direct services) earn a wage that cannot be considered a "living" or "housing" wage appropriate to the region in which they reside. NERC does not estimate costs for services that reflect an appropriate living wage, because while this is a very important issue, the analysis required would dramatically increase the cost of provision and would require an intensive survey of individual organizations to determine prevailing wages in different roles. Rather, the estimates in this report reflect current wages, as used by previous reports and currently available data. We encourage future projects to take the low prevailing wage into account, and develop better estimates for a living or housing wage in the region.

Major efforts to fund affordable and supportive housing are underway in the tri-county region. Some of these include the Portland Housing Bond passed by voters in 2017 which involves funding for a targeted 600 units affordable to households with 0–30% AMI (area median income), 300 of which will be permanent supportive housing units and 50% of all units will be family sized units. In addition, the Metro Affordable Housing Bond was passed at the end of 2018, creating a fund to build 3,900 affordable housing units, with 1,600 of those dedicated to households 0–30% AMI. The Metro bond includes funding only for the capital cost portions, but not operating or service costs associated with the housing, and will need to be leveraged with additional funding sources for those costs. As these programs are currently ongoing, we did not include the anticipated new units created through the bonds.

Another significant element not addressed by this report is the impact that providing housing assistance at a previously unprecedented level would have on the housing market. Obviously, a massive influx of government assistance into the rental market would have dynamic implications for pricing and supply. It is not possible at this stage to determine those impacts, and this report therefore takes a static approach to market analysis and assumes no change, rather than assuming an uncertain level of change.

Lastly, we have not calculated specific costs related to supporting communities of color. Addressing historic inequities associated with racism are essential in providing housing for people experiencing homelessness, because people of color are disproportionately represented in homelessness rates. These costs may include anti-racism training for service providers, capacity building in organizations that serve people of color but do not specialize in homelessness, more intensive healthcare services, etc. These additional or more intensive supports reflect the unequal treatment that people of color have received. Additional research is needed to understand the magnitude of additional costs which a homelessness services and housing system centered on the needs of people of color would cost.

Table 2.10: Detailed Cost Scenario Estimates by Cost Category (nominal dollars; not adjusted for inflation)

	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
Scenario 1[LOW]						I		1		
Capital Cost	\$665,148,521	\$705,057,432	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Operating Cost	\$16,675,625	\$34,018,275	\$34,698,640	\$35,392,613	\$36,100,465	\$36,822,475	\$37,558,924	\$38,310,103	\$39,076,305	\$39,857,831
Private Lease Cost	\$288,104,039	\$293,866,120	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Service Cost (PSH)	\$24,946,735	\$50,891,339	\$51,909,166	\$52,947,349	\$54,006,296	\$55,086,422	\$56,188,151	\$57,311,914	\$58,458,152	\$59,627,315
Service Cost (non-PSH)	\$126,524,050	\$129,054,532	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Service Cost (all)	\$12,540,111	\$12,790,914	\$2,654,446	\$2,707,535	\$2,761,686	\$2,816,919	\$2,873,258	\$2,930,723	\$2,989,337	\$3,049,124
Admin Cost	\$21,694,023	\$22,738,600	\$1,309,527	\$1,335,717	\$1,362,432	\$1,389,680	\$1,417,474	\$1,445,823	\$1,474,740	\$1,504,235
Scenario 1[HIGH]		1	1	1		-		1		1
Capital Cost	\$804,317,341	\$852,576,381	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Operating Cost	\$22,234,167	\$45,357,700	\$46,264,854	\$47,190,151	\$48,133,954	\$49,096,633	\$50,078,566	\$51,080,137	\$52,101,740	\$53,143,774
Private Lease Cost	\$644,990,632	\$657,890,445	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Service Cost (PSH)	\$28,348,562	\$57,831,067	\$58,987,689	\$60,167,442	\$61,370,791	\$62,598,207	\$63,850,171	\$65,127,175	\$66,429,718	\$67,758,312
Service Cost (non-PSH)	\$126,524,050	\$129,054,532	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Service Cost (all)	\$12,540,111	\$12,790,914	\$2,654,446	\$2,707,535	\$2,761,686	\$2,816,919	\$2,873,258	\$2,930,723	\$2,989,337	\$3,049,124
Admin Cost	\$21,775,667	\$22,905,153	\$1,479,411	\$1,508,999	\$1,539,179	\$1,569,963	\$1,601,362	\$1,633,390	\$1,666,057	\$1,699,378
Scenario 2[LOW]		1				-		1		1
Capital Cost	\$465,603,964	\$493,540,202	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Operating Cost	\$11,672,937	\$23,812,792	\$24,289,048	\$24,774,829	\$25,270,326	\$25,775,732	\$26,291,247	\$26,817,072	\$27,353,413	\$27,900,482
Private Lease Cost	\$337,033,800	\$343,774,476	\$20,704,515	\$21,118,606	\$21,540,978	\$21,971,797	\$22,411,233	\$22,859,458	\$23,316,647	\$23,782,980
Service Cost (PSH)	\$32,430,755	\$50,891,339	\$51,909,166	\$52,947,349	\$54,006,296	\$55,086,422	\$56,188,151	\$57,311,914	\$58,458,152	\$59,627,315
Service Cost (non-PSH)	\$126,524,050	\$129,054,532	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Service Cost (all)	\$12,540,111	\$12,790,914	\$2,654,446	\$2,707,535	\$2,761,686	\$2,816,919	\$2,873,258	\$2,930,723	\$2,989,337	\$3,049,124
Admin Cost	\$24,141,524	\$25,051,842	\$3,669,034	\$3,742,415	\$3,817,263	\$3,893,608	\$3,971,481	\$4,050,910	\$4,131,928	\$4,214,567
Scenario 2[HIGH]						•				
Capital Cost	\$603,517,184	\$639,728,215	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

	-	1			1			1	1	
Operating Cost	\$15,563,917	\$31,750,390	\$32,385,398	\$33,033,106	\$33,693,768	\$34,367,643	\$35,054,996	\$35,756,096	\$36,471,218	\$37,200,642
Private Lease Cost	\$740,971,797	\$755,791,233	\$38,283,093	\$39,048,755	\$39,829,730	\$40,626,325	\$41,438,851	\$42,267,629	\$43,112,981	\$43,975,241
Service Cost (PSH)	\$36,853,131	\$57,831,067	\$58,987,689	\$60,167,442	\$61,370,791	\$62,598,207	\$63,850,171	\$65,127,175	\$66,429,718	\$67,758,312
Service Cost (non-PSH)	\$126,524,050	\$129,054,532	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Service Cost (all)	\$12,540,111	\$12,790,914	\$2,654,446	\$2,707,535	\$2,761,686	\$2,816,919	\$2,873,258	\$2,930,723	\$2,989,337	\$3,049,124
Admin Cost	\$24,247,661	\$25,218,396	\$3,838,919	\$3,915,697	\$3,994,011	\$4,073,891	\$4,155,369	\$4,238,477	\$4,323,246	\$4,409,711
Scenario 3[LOW]										
Capital Cost	\$332,574,260	\$352,528,716	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Operating Cost	\$8,337,812	\$17,009,137	\$17,349,320	\$17,696,307	\$18,050,233	\$18,411,237	\$18,779,462	\$19,155,051	\$19,538,152	\$19,928,915
Private Lease Cost	\$350,300,823	\$357,306,839	\$34,507,526	\$35,197,676	\$35,901,630	\$36,619,662	\$37,352,056	\$38,099,097	\$38,861,079	\$39,638,300
Service Cost (PSH)	\$37,420,102	\$50,891,339	\$51,909,166	\$52,947,349	\$54,006,296	\$55,086,422	\$56,188,151	\$57,311,914	\$58,458,152	\$59,627,315
Service Cost (non-PSH)	\$126,524,050	\$129,054,532	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Service Cost (all)	\$12,540,111	\$12,790,914	\$2,654,446	\$2,707,535	\$2,761,686	\$2,816,919	\$2,873,258	\$2,930,723	\$2,989,337	\$3,049,124
Admin Cost	\$24,261,269	\$25,051,842	\$3,669,034	\$3,742,415	\$3,817,263	\$3,893,608	\$3,971,481	\$4,050,910	\$4,131,928	\$4,214,567
Scenario 3[HIGH]										
Capital Cost	\$431,083,703	\$456,948,725	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Operating Cost	\$11,117,083	\$22,678,850	\$23,132,427	\$23,595,075	\$24,066,977	\$24,548,316	\$25,039,283	\$25,540,068	\$26,050,870	\$26,571,887
Private Lease Cost	\$765,502,807	\$780,812,863	\$63,805,156	\$65,081,259	\$66,382,884	\$67,710,542	\$69,064,752	\$70,446,048	\$71,854,968	\$73,292,068
Service Cost (PSH)	\$42,522,844	\$57,831,067	\$58,987,689	\$60,167,442	\$61,370,791	\$62,598,207	\$63,850,171	\$65,127,175	\$66,429,718	\$67,758,312
Service Cost (non-PSH)	\$126,524,050	\$129,054,532	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Service Cost (all)	\$12,540,111	\$12,790,914	\$2,654,446	\$2,707,535	\$2,761,686	\$2,816,919	\$2,873,258	\$2,930,723	\$2,989,337	\$3,049,124
Admin Cost	\$24,383,735	\$25,218,396	\$3,838,919	\$3,915,697	\$3,994,011	\$4,073,891	\$4,155,369	\$4,238,477	\$4,323,246	\$4,409,711

Preventing homelessness and stabilizing housing

In this section, we estimate the potential cost to prevent homelessness and stabilize housing by identifying households who are most susceptible or most at-risk of losing their housing due to their low wages, high housing costs, and rental costs. We estimate the cost of providing universal rent assistance to all low-income renter households (between 0-80% MFI) who are cost burdened (>30% of income spent on rent155) or severely cost burdened (>50% of income spent on rent), and the administrative costs for such a program. We then conduct an affordable housing gap analysis that estimates the gap between the supply of housing units (units with rents below 30% of MFI) and demand of housing units (households with income between 0–80% MFI) for affordable housing.156 We then estimate the availability of rental housing units with rents between 30–80% MFI for this potential rent assistance program.

Background Context

We provide background information here to help illustrate the state of housing (in 2017) in the tri-county area. While the majority of households in the tri-county area own

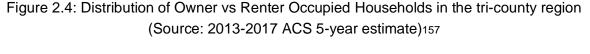
Median Income

Median income identifies the point where 50% of people make over that amount and 50% make less than that amount. Median income can be calculated for different groupings of people such as different geographies, family size, household size, race, etc. In this report, we use median family income (MFI) in our calculations. Determining who is described as low income depends on what part of the income spectrum a family falls. If you make less than 80% MFI, you would be considered lowor moderate-income.

homes, there is a sizeable minority that are renters, as shown in Figure 2.4 for each of the three counties in Metro areas. Multhomah County, where homes are more expensive, displays the highest proportion of renters at 45.7%, while Clackamas County (the least urban of the three) displays the lowest, with less than a third renting.

Certain groups are represented disproportionately in the renting population. On average, the renting population is lower income than the home-owning population (Figure 2.5). Looking at race, households with Black, Native, and Hispanic heads earn a median income lower than the average, as shown in Figure 2.6. The median salary for Black households in the Portland area is half that of the overall median—a significant disparity, and a sign of the current and historic systemic issues faced by this population in the region. Given the lower median incomes for these communities of color, we are not surprised to see higher averages of renters for

155 While HUD's definition of "cost burdened" is that the entire cost of housing (including utilities) exceeds 30% of monthly income, we use the term here to mean that only rent exceeds 30%. This is due to the format of the available data: the decision was made to prioritize incorporating unit and family size, over including utility cost. If utilities were included, the impact would be a slightly larger affordability gap. 156 Because of time constraints and data availability, we only look at gross rent and do not include other common housing cost data, such as utilities. communities of color; see Figure 2.7. Because of these racial disparities, renters' issues are racial equity issues. This means that strategies to assist renters have impacts that increase racial equity within the metro area because non-white groups are more heavily represented in the renting population.



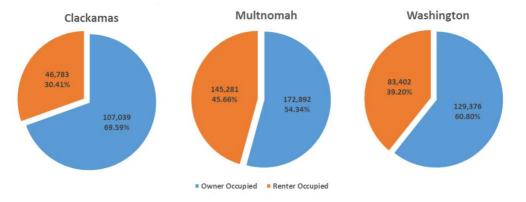
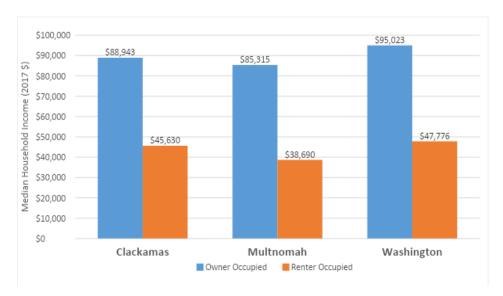


Figure 2.5: Owner vs Renter Occupied Household by Median Household Income in the tricounty region (Source: 2013-2017 ACS 5-year estimate)₁₅₈



157 U.S. Census Bureau. (2018). 2013-2017 ACS 5-year estimates. Retrieved from https://www.census.gov/programs-surveys/acs/technical-documentation/table-and-geographychanges/2017/5-year.html
158 U.S. Census Bureau. (2018). 2013-2017 ACS 5-year estimates. Retrieved from https://www.census.gov/programs-surveys/acs/technical-documentation/table-and-geographychanges/2017/5-year.html

Figure 2.6: Median Household Income by Race (Source: 2013-2017 ACS 5-year estimate) 159

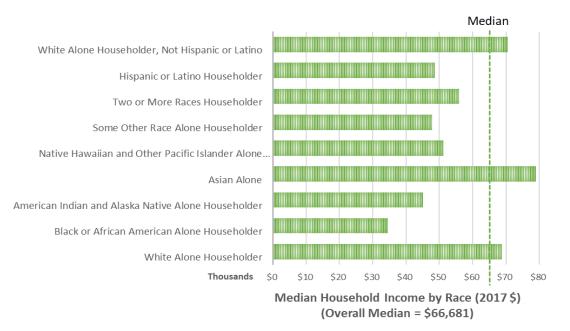
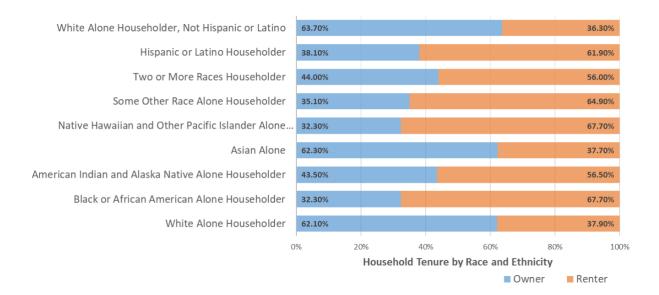


Figure 2.7: Household Tenure (Owner vs Renter) by Race (Source: 2013-2017 ACS 5-year estimates)₁₆₀



159 U.S. Census Bureau. (2018). 2013-2017 ACS 5-year estimates. Retrieved from https://www.census.gov/programs-surveys/acs/technical-documentation/table-and-geographychanges/2017/5-year.html 160 Ibid

Costs of Universal Rent Assistance Program

Long-term rent assistance has proven to reduce homelessness as well as provide better health outcomes for community members.¹⁶¹ In order to estimate the cost of a universal rent assistance program to prevent those households who are most susceptible or most at-risk of losing their housing, we utilized the 2017 ACS 5-year estimates to identify the number of renter households who are *cost burdened* (paying more than 30% of household income in the past 12 months in gross rent and other housing costs) or *severely cost burdened* (paying more than 50% of household income in the past 12 months in gross rent and other housing costs) in each income bracket¹⁶² in the tri-county region (Clackamas, Multnomah and Washington Counties). Severely cost burdened households are a subset of the cost burdened households.

Within each income bracket, we assume that the household size distribution is equivalent to the household size distribution for all renter-occupied housing units in the region₁₆₃ and assume that the household income level is equal to the midpoint of the income bracket. Next, we calculate the maximum annual rent (including utilities) that households would be responsible for (30% of their household income). Then, for each income bracket and household size, we estimate the difference between the maximum annual rent and the market rental price (using rent levels shown in Table 2.1 in the *Costs* section, page 56) for the specified housing unit size, which is the estimated amount of rent assistance per household. Table 2.11 summarizes the number of cost burdened and severely cost burdened households within different income levels, and estimates the costs of universal rent assistance, administrative costs and eviction prevention program costs. These costs are expressed in nominal 2017 dollars on an annual basis. The total costs for such a universal rent assistance program include the cost of rent assistance, administrative costs of rent assistance, administrative costs. We do not take into account any households already receiving assistance, as the ECONorthwest report did. We have no way of knowing if those supports are adequate, or at what level they will continue.

Table 2.12 summarizes the total costs of a universal rent assistance program for years 2024 to 2033, the same analysis timeframe as the previous sections of this report. We take the highest and lowest estimates of rent assistance costs from Table 2.11 to construct Table 2.12, which includes nominal costs for each year (incorporates inflation) and net present values for each year in 2019 dollars. The estimates indicate that this type of program would cost between \$10.7 billion and \$21 billion (2019\$) to address all cost burdened households, and between \$8.7 billion and \$16.6 billion for all severely cost burdened households for the years of 2024 to 2033 (the severely cost burdened group is a subset of the cost burdened group). While this cost

161 Fleary, S.A., Joseph, P., Zhang, E. & Quirion, C. (2019). "They give you back that dignity": Understanding the intangible resources that make a transitional house a home for homeless families, *Journal of Social Distress and the Homeless*, 13(1), 835-866.
162 U.S. Census Bureau. (2018). 2013-2017 ACS 5-year estimates. Retrieved from https://www.census.gov/programs-surveys/acs/technical-documentation/table-and-geography-changes/2017/5-year.html
163 Ibid

encompasses all households earning from 0–80% MFI, it is useful to consider how this money is distributed between the income tiers: see Table 2.13 for a summary of NPV estimates over ten years for 0–30% MFI and 0–60% AMI, in addition to the 0–80% MFI estimates repeated from Table 2.12.

		0-30% MFI	30-60% MFI		60-80% MFI		Total (0-80% MFI)
Number of severely cost burdened renter households (>50% of income on rent)		44,953	24,073		13,551		82,576
Cost of universal rent assistance (2017 \$)							
HUD FMR (2017)	\$	508,634,283	\$ 187,090,274	\$	3,091,894	\$	698,816,451
Portland State of Housing (2017) city avg	\$	604,426,818	\$ 235,114,342	\$	39,427,039	\$	878,968,199
Portland State of Housing (2017) neighborhood avg high	\$	862,560,407	\$ 437,303,469	\$	89,172,775	\$ 2	1,389,036,65
Cost of administering rent assistance program (2017)	\$	35,962,148	\$ 19,258,271	\$	10,840,454	\$	66,060,873
	1			1		<u> </u>	
		0-30% MFI	30-60% MFI		60-80% MFI		Total (0-80% MFI)
Number of cost burdened renter households (>30% of income on rent)		51,650	31,514		23,875		107,039
Cost of universal rent assistance (2017 \$)							
HUD FMR (2017) Rents	\$	586,347,728	\$ 249,359,111	\$	22,098,684	\$	857,805,523
Portland State of Housing (2017) City Avg Rents	\$	693,119,557	\$ 311,599,075	\$	82,216,186	\$ 8	1,086,934,81
Portland State of Housing (2017) Neighborhood High Rents	\$	997,824,502	\$ 583,603,877	\$	177,792,823	\$	1,759,221,203

Table 2.11: Cost of Universal Rent Assistance Program (2017 dollars) by Income Level and Cost Burden, 2017

Cost of administering rent assistance program \$

41,319,994

\$

25,210,856

\$

19,100,248

\$

85,631,098

Table 2.12: Detailed Costs of Universal Rent Assistance Program in Nominal and Net Present
Value (2024–2033), 0–80% AMI

			2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	Total NPV
Severe	LO W	(nomin al)	\$ 875,65 6,983	\$ 893,17 0,123	\$ 911,03 3,525	\$ 929,25 4,196	\$ 947,83 9,280	\$ 966,79 6,065	\$ 986,13 1,987	\$ 1,005,8 54,626	\$ 1,025,9 71,719	\$ 1,046,4 91,153	
ly Cost Burden ed	HI GH		\$ 1,668,5 03,035	\$ 1,701,8 73,096	\$ 1,735,9 10,558	\$ 1,770,6 28,769	\$ 1,806,0 41,345	\$ 1,842,1 62,172	\$ 1,879,0 05,415	\$ 1,916,5 85,523	\$ 1,954,9 17,234	\$ 1,994,0 15,578	
	NP V- LO W	(2019 \$)	\$ 833,15 7,574	\$ 841,40 6,658	\$ 849,73 7,417	\$ 858,15 0,659	\$ 866,64 7,200	\$ 875,22 7,866	\$ 883,89 3,488	\$ 892,64 4,909	\$ 901,48 2,977	\$ 910,40 8,551	\$ 8,712,757,300
	NP V- HI GH		\$ 1,587,5 23,388	\$ 1,603,2 41,441	\$ 1,619,1 15,119	\$ 1,635,1 45,962	\$ 1,651,3 35,526	\$ 1,667,6 85,382	\$ 1,684,1 97,119	\$ 1,700,8 72,338	\$ 1,717,7 12,658	\$ 1,734,7 19,714	\$ 16,601,548,646
Cost Burden	LO W	(nomin al)	\$ 1,079,8 92,562	\$ 1,101,4 90,413	\$ 1,123,5 20,221	\$ 1,145,9 90,625	\$ 1,168,9 10,438	\$ 1,192,2 88,647	\$ 1,216,1 34,420	\$ 1,240,4 57,108	\$ 1,265,2 66,250	\$ 1,290,5 71,575	
ed	HI GH		\$ 2,115,3 35,833	\$ 2,157,6 42,549	\$ 2,200,7 95,400	\$ 2,244,8 11,308	\$ 2,289,7 07,535	\$ 2,335,5 01,685	\$ 2,382,2 11,719	\$ 2,429,8 55,953	\$ 2,478,4 53,072	\$ 2,528,0 22,134	
	NP V- LO W	(2019 \$)	\$ 1,027,4 80,719	\$ 1,037,6 53,795	\$ 1,047,9 27,595	\$ 1,058,3 03,116	\$ 1,068,7 81,364	\$ 1,079,3 63,358	\$ 1,090,0 50,124	\$ 1,100,8 42,700	\$ 1,111,7 42,132	\$ 1,122,7 49,480	\$ 10,744,894,383
	NP V- HI GH		\$ 2,012,6 69,463	\$ 2,032,5 96,883	\$ 2,052,7 21,605	\$ 2,073,0 45,581	\$ 2,093,5 70,785	\$ 2,114,2 99,208	\$ 2,135,2 32,864	\$ 2,156,3 73,783	\$ 2,177,7 24,019	\$ 2,199,2 85,643	\$ 21,047,519,834

Table 2.13: NPV of Rent Assistance from 2024 to 2033 for 0-30%, 0-60%, and 0-80% AMI

Burden Level	Income Level	Low	High	
	0-30% AMI	\$ 6,224,401,436	\$ 10,269,558,832	
Severely Cost Burdened	0-60% AMI	\$ 8,582,838,082	\$ 15,487,778,030	
	0-80% AMI	\$ 8,712,757,300	\$ 16,601,548,646	
	0-30% AMI	\$ 7,173,855,077	\$ 11,876,780,908	
Cost Burdened	0-60% AMI	\$ 10,312,020,516	\$ 18,835,157,950	
	0-80% AMI	\$ 10,744,894,383	\$ 21,047,519,834	

Affordable Housing Gap Analysis

Based on recent data, we identified a gap that exists between the demand for affordable housing units and the supply available. This means that there are not enough housing units available for people to pay 30% or less of their income to housing. People paying 30% or less of their income on housing costs is considered the best way to promote housing security and stability along with better health outcomes.^{164, 165} Adding a further squeeze on the supply of affordable housing, some housing units at the lower end of the housing market may be rented by people who could afford to pay more and are instead paying substantially less than 30% of their income, further decreasing supply at lower-income levels.

The affordability housing gap analysis for this report was constructed using federal data sources: the US Department of Housing and Urban Development's Comprehensive Housing Affordability Strategy (HUD CHAS) dataset for 2015 in the Portland tri-county area (Clackamas, Multnomah, and Washington counties)₁₆₆, and American Community Survey (ACS) data from the five-year averages for 2013–2017 for the same counties.₁₆₇ Additionally, we used HUD median family income information for the Portland-Vancouver-Hillsboro MSA for 2017 to establish income brackets equal to 0–30%, 30–50%, and 50–80% MFI.₁₆₈

Housing Supply and Demand

In order to determine the affordable housing gap, we first estimate the supply by using the HUD CHAS dataset from 2015 (specifically, questions 15C and 14B) to arrive at the number of housing units in the tri-county area at various levels of cost burden, including the income level of the renter (in terms of percent of AMI) and number of bedrooms. These data include both units that are occupied, and units that are not, and these are summed to arrive at a value for supply.

Demand is determined using ACS five-year average data: first, household sizes within various income brackets are assumed to match overall household size distribution. Next, household incomes are assumed to fall at the midpoint of each income bracket, so households earning, for example, \$20,000–\$24,999 are included at \$22,500. Using these values, the number of

¹⁶⁸ Portland Housing Bureau. (n.d.). 2017 Median income for a family of four in the Portland-Vancouver-Hillsboro MSA. Retrieved from https://www.portlandoregon.gov/phb/article/651806

¹⁶⁴ Bailey, K. T., Cook, J. T., Ettinger de Cuba, S., Casey, P. H., Chilton, M., Coleman, S. M., & Frank, D. A. (2016). Development of an index of subsidized housing availability and its relationship to housing insecurity. *Housing Policy Debate*, *26*(1), 172-187.

¹⁶⁵ Meltzer, M., & Schwartz, A. (2016) Housing affordability and health: Evidence from New York City. *Housing Policy Debate*, (26:1), 80-104.

¹⁶⁶ HUD Office of Policy Development and Research. (2019). Consolidated planning/CHAS data. Retrieved from https://www.huduser.gov/portal/datasets/cp.html

^{167 2013-2017} ACS 5-year average tables SE:A14003B – Household Income in the Past 12 Months (in 2017 Inflation-Adjusted Dollars) (Renter-Occupied Housing Units) and SE:A100002B – Household Size (Renter-Occupied Housing Units).

households at 0–30%, 30–50%, 169 and 50–80% MFI are estimated using HUD MFI values for different household sizes. Finally, we assume that households with one to two members will require a studio or one-bedroom unit, households with three members will require two-bedroom units, and households with four or greater members will require greater than two bedrooms.

Based on these figures, identifying the gap is a matter of finding the differences in supply and demand at said levels and sizes. Additionally, we conduct spatial analysis to find gaps by income level and unit size by area.

These housing unit shortages are not distributed evenly across income levels, or in geographic terms. Households are free to rent units that do not amount to 30% of their income as well. That means that better-off households may choose units that cost less than that. Adding additional challenges for low-income households, wealthier households are more likely to obtain units by virtue of the rental approval process. All of these factors mean that identifying the shortage is a complicated and uncertain process.

Understanding spatial aspects for housing markets are important. While one area might have more affordable units at a given price level, they may not be appropriate locations for people who are transit-dependent or reliant on services that are not evenly dispersed around the region. Further out locations may not be opportunity-rich neighborhoods, where ample green space and health care are typically located.

The table below (Table 2.14) estimates the change in affordable units by county over the twoyear period following the data year used, which is 2015. Despite adding 2,243 affordable housing units over two years, the affordable housing gap remains. This is partially due to uneven geographic distribution of added units and varying demand for different sizes of units. Per our analysis, Clackamas County appears to have lost affordable units between 2015 and 2017. Recently described slow-downs in the housing market are unlikely to create an increased supply of affordable housing. Bates (2017) found that vacancy rates in high quality ("five stars") apartments was much higher than naturally occurring affordable housing.¹⁷⁰

169 Note that here the range is 30-50% AMI, while elsewhere this report uses 30-60% MFIas a bracket. This is due to differences in data format from various sources: the data obtained from the ACS questions breaks at 50% rather than 60%.

170 Seyoung, S. & Bates, L. (2017). Preserving housing choice and opportunity: A study of apartment building sales and rents. Urban Studies and Planning Faculty Publications and Presentations. Retrieved from https://pdxscholar.library.pdx.edu/cgi/viewcontent.cgi?article=1203&context=usp_fac

	Regulated Affordable Housing Units								
	2015	2017	Change	% Change					
Clackamas	3,937	3,804	(133)	-3.38%					
Multnomah	24,989	26,625	1,636	6.55%					
Washington	7,307	8,047	740	10.13%					
Total	36,233	38,476	2,243	6.19%					

 Table 2.14: Regulated Affordable Housing Units (Source: 2017 Regional Inventory of Regulated

 Affordable Rental Housing171)

Figure 2.8 shows the estimated shortages at various income levels in each county, and Figure 2.9 shows estimated shortages by unit size (relying on the family size assumptions described above) and county. While the shortage for Multnomah County appears to signify a unique problem in that area, this is due to the larger number of households and units within this densely urban area, and the housing shortage on a per capita basis is comparable in the other counties.

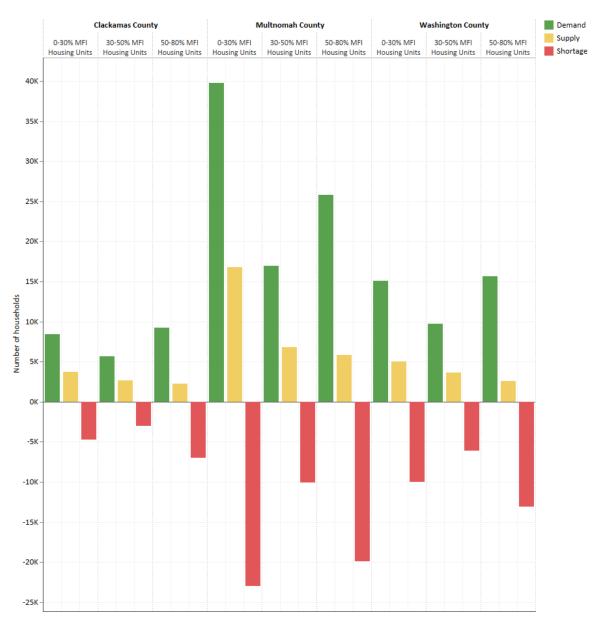
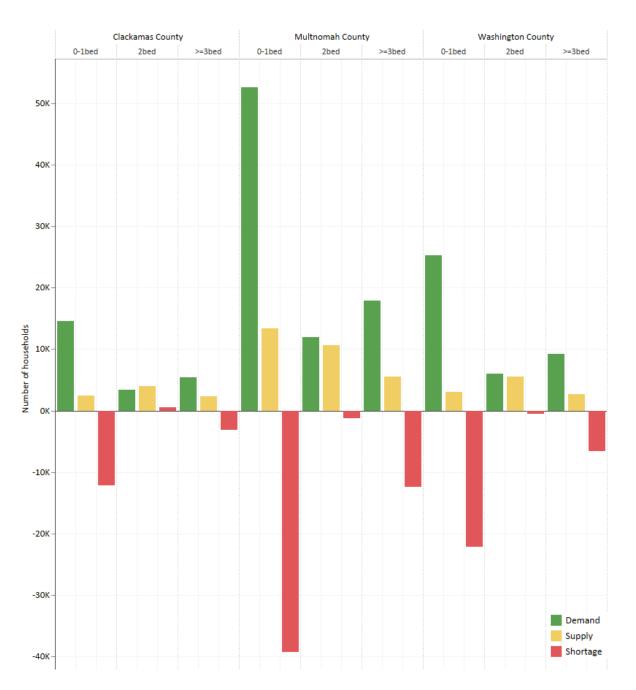


Figure 2.8: Affordable Housing Gap by County and by Household Income172

Demand	8,414	5,704	9,277	39,790	16,930	25,797	15,049	9,723	15,672
Supply	3,727	2,656	2,258	16,785	6,831	5,871	5,057	3,617	2,609
Shortage	-4,687	-3,048	-7,019	-23,005	-10,099	-19,926	-9,992	-6,106	-13,063

172 Assumes households will not pay more than 30 percent of their income.





Demand	14,521	3,453	5,421	52,629	11,970	17,918	25,220	5,975	9,249
Supply	2,389	3,949	2,303	13,329	10,676	5,482	3,083	5,498	2,702
Shortage	-12,132	496	-3,118	-39,300	-1,294	-12,436	-22,137	-477	-6,547

Figure 2.10 breaks the shortage down by showing how many units are available at different income levels per hundred households and by county. All counties are suffering comparable shortages. Washington County has a more severe shortage than Multhomah at 0-50% MFI

Figure 2.10: Availability of Affordable Housing (per 100 households) by County and by Household Income



Availability of Affordable Housing (per 100 households)

Figures 2.11 and 2.12 show mapped availability of affordable housing by census tract. Redder areas have fewer affordable units, while pink or blue areas have a lower shortage of affordable units are various income levels. Note that households may move from one census tract to another (although it is likely that jobs and schools make large moves difficult and undesirable). These maps serve as a static image of the situation a few years ago (based as they are in data from the 2015 HUD CHAS, and 2013-2017 five-year average ACS data). Some areas showing little to no shortage may actually have low population.

Figure 2.11: Spatial distribution of available rental housing units for 0–80% MFI Households by Census tract (per household)

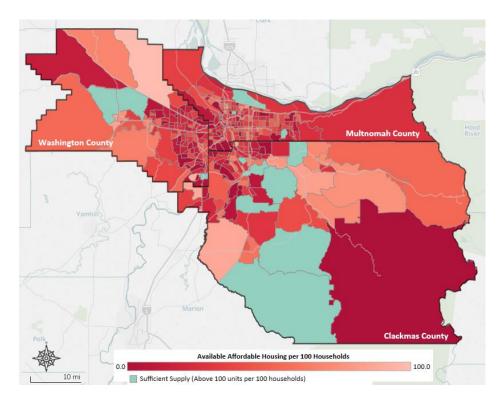
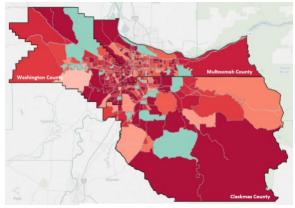
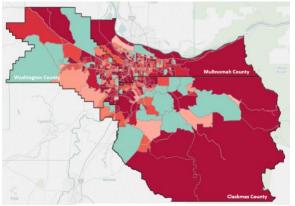


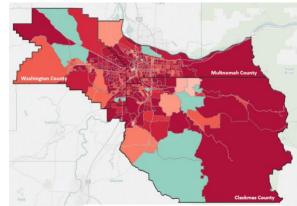
Figure 2.12: Spatial distribution of available affordable rental housing units by Census tract and by household income



(a) Affordable housing for 0-30% MFI households



(b) Affordable housing for 30-50% MFI households



(c) Affordable housing for 50-80% MFI households

Note: Legend is based on number of affordable housing per 100 households between 0 and 100 (any shade of red indicates a shortage, while census tracts with sufficient supply of affordable housing are designated in green),

Affordable Housing Gap with Rent Assistance Program

To help understand how to support the number of households needing support to avoid homelessness or obtain housing security, we examined how a large, long-term rent assistance program would help close the gap for households living in deep housing insecurity. To conduct this analysis, we assumed that fair market rents would not change, even with the introduction of a large number of vouchers. This is unlikely to happen, but we chose to conduct this exercise to give a sense of the shortage of affordable units. Remember that we only included gross rent, and no other housing costs, in this part of the analysis. This means that there may be even fewer units available, and that people from low-income backgrounds experience more difficulty accessing available housing for a range of reasons. After establishing the shortage of affordable rental housing units in the tri-county region, we identified available rental housing units for a potential rent assistance program, i.e., units that are not affordable at their lease rate to people who are low-income. To do this, we utilized the same procedure as the affordable housing gap analysis described above (identifying the mismatch between supply and demand). This time, we focused on available rental housing units for people who are 30–80% cost burdened and vacant units. In this scenario, a housing assistance voucher has been applied, meaning that they can now afford units they could not previously afford without this rent assistance. Table 2.20 compares the unmet demand for rental units to the available rental units that are unaffordable at state lease rates, by income level and by number of bedrooms. The final section of the table shows the percentage of unmet demand that can be fulfilled by the available rental units currently at 30-80% cost burden (not including vacant units). In other words, it shows the amount of housing stock that exists and does not need to be constructed if a voucher program is implemented, again assuming no changes in market rates, and landlords and developers work with government entities and community development corporations to accept all tenants.

If a universal rent assistance program to help prevent homelessness were implemented, these estimates provide a look at whether households might be able to find rental units with the provided assistance. In most income levels and housing unit sizes, we find that there are sufficient rental units to be subsidized through such a program. However, in terms of available units, even after making housing vouchers available, shortages still exist in the 0-1 bedroom category for 0-30% and 50-80% MFI levels, and in the >3 bedroom category for households that earn 30-50% MFI. However, these shortages could be corrected by, for example, allowing individual households to use vouchers on two-bedroom units.

	0-30% AMI	30-50% AMI	50-80% AMI	Vacant
Unmet Demand for Affordable Rent	tal Units			
0-1 bedrooms	(29,439)	(11,163)	(22,895)	
2 bedrooms	(5,295)	(6,087)	(5,178)	
>3 bedrooms	(10,131)	(8,093)	(5,045)	
Available Rental Units (Unaffordab	le, 30-80% Cos	t Burden)		
0-1 bedrooms	15,420	15,970	7,180	1,885
2 bedrooms	11,165	16,055	21,340	3,200
>3 bedrooms	11,060	6,545	10,720	1,470
Ratio of Available Rental Units to U	Inmet Demand			
	52.38%	143.07%	31.36%	
	(14,019	(4,807 unit	(15,715	
0-1 bedrooms	units short)	surplus)	units short)	
	210.85%	263.76%	412.12%	
	(5,870 unit	(9,968 unit	(16,162 unit	
2 bedrooms	surplus)	surplus)	surplus)	
	109.17%	80.87%	212.49%	
	(929 unit	(1,548 units	(5,675 unit	
>3 bedrooms	surplus)	short)	surplus)	

Table 2.15: Housing Unit Shortage, Post Universal Housing Voucher

There are some important issues to consider about Table 2.20. The available rental units may also not be located evenly throughout the region. Where an adequate supply of larger housing units might exist (e.g., two bedrooms), assistance could be provided to put single adults into that housing. Note that the data used here produces static estimates. Our analyses provide guidance for the general magnitude of affordable housing shortages and available rental units, but should not be taken as an accurate depiction of the extremely dynamic housing market. Further, these calculations are based only on gross rent and do not include other housing costs, such as utilities. Perhaps most importantly, households are not always able to use rent vouchers for a range of reasons—not enough housing available, too far from mass transit, racial discrimination, prior eviction, landlord screening practices, etc.173

Limitations and Considerations

There are also multiple caveats to the findings here beyond the general data reliability issues common with ACS and other data sets. Housing markets have submarkets that function differently than traditional supply and demand models might explain. Some submarkets are unlikely to ever be produced by a traditional market (e.g., why would a developer build housing that they could not at least recover the costs of) without some type of government intervention. Earlier, we discussed spatial limitations of some of these analyses. For instance, considering where we want different types of housing must be considered when reviewing findings like those presented in Table 2.20. A simple interpretation of the table might mean that people think we have an adequate supply of housing for people who are 30–80% cost burdened for certain unit sizes once rent assistance is made available. However, further analyses must be conducted to determine if this housing is located in opportunity rich areas. Clustering all affordable units on the outskirts of the region away from mass transit is not an equitable solution. The City of Portland PHB provides detailed analyses of housing unit available by neighborhood to emphasize the importance of this spatial view.174

Our analyses also do not take into account the quality of available affordable housing. It is not enough to provide housing, as we should be providing quality and safe affordable housing. Providing quality, affordable housing appropriately located to services and opportunities will likely increase costs from what we provide next. Between spatial distribution and housing quality, we may have less available or vacant affordable housing than it seems.

We focus on renter households because they are typically the most precariously housed. Further research should examine the precariousness of homeowners in a burgeoning housing market, especially as we ask more from taxpayers in helping to address the negative

173 Turner, M. (2003). Strengths and weaknesses of the housing voucher program. *Urban Institute.* Retrieved from https://www.urban.org/sites/default/files/publication/64536/900635-Strengths-and-Weaknesses-of-the-Housing-Voucher-Program.pdf

174 Portland Housing Bureau. (2017). *State of Housing in Portland*. Retrieved from https://www.portlandoregon.gov/phb/article/681253.

repercussions of escalating real estate values to moderate and low-income community members.

We do not estimate the cost (or need) of households that are discussed in the homeless prevention section that may need some type of temporary or permanent supportive services. We focus only on the cost of providing housing, and administering these housing programs.

Lastly, we do not estimate the cost of creating new units to meet demand after rent assistance is made available. The estimates for developing or acquiring new units discussed earlier in this section could be used to estimate those costs.

Why Don't Our Numbers Match Other Reports?

Numbers related to homelessness do not share consistent definitions and sometimes rely on weak data sources and collection procedures. In addition, more robust data sources such as those put out by the US Census have estimates and counts that vary from year to year. Further, with US Census data in particular, when we talk about the housing needed for homelessness, we are talking about a small portion of the total housing data for the region. When using US Census data estimates (instead of the raw count data gathered every 10 years), the data become more unreliable as you disaggregate it. But, the primary reason for major differences in number of households or cost estimates between reports is which populations are identified for support and their size.

For instance, HUD homelessness counts for 2017 Point-in-Time count (PIT) for the three counties was about 6,000 people, and is just for one night during the year. Our count includes an annualized PIT count for people living unsheltered, and annualized shelter data. Our estimates also include an estimate for doubled-up families and unaccompanied youth. This means that our 38,000 person estimate for 2017 is for people who have experienced homelessness across the year, and includes a broader definition than other reports driven by HUD reporting.

Turning to households that are housing insecure or at risk of homelessness, ECONorthwest estimates 56,000 households are at risk of homelessness, and that it would cost about \$550 million annually to serve them. ECONorthwest includes Clark County in Washington State in their calculations, while we limit ours to the 3 counties on the Oregon side. Most importantly, they only included households up to 50% MFI and more than 50% rent burdened who were not receiving rent assistance, a classification that HUD describes as worst-case housing needs. We instead included households making up to 80% MFI, and more than 30% rent burdened. We also opted to be more conservative and not assume existing service levels continue forward. Our additional concern here was that we had no way of knowing how many households were receiving adequate support. Several stakeholders pointed out that just because someone was receiving assistance, it may not be an adequate amount of assistance. Further, research consistently demonstrates that households at above 30% of housing costs are at risk of homelessness and displacement.

Providing emergency shelters

Emergency shelters are defined by HUD as places for homeless individuals to inhabit temporarily, that do not require said individuals to sign any kind of lease or rental agreement. There are generally three essential types: conventional shelters, which provide a bed to sleep in and access to services; day centers, where individuals can spend time and receive services during daytime hours but may not sleep overnight; and severe weather shelters, which operate as extensions of the previous two types in the event of weather that endangers those on the streets and necessitates increased capacity.

Of course, if all homeless families and individuals or at risk of becoming homeless are permanently housed, the need for emergency shelters will be dramatically reduced. This report does not undertake the task of assuming exactly how much the need would decrease.

In the fiscal year of 2017, over 9,000 individuals (29.5% are in families) were served in emergency shelters in Multhomah County, for a total of \$15,368,395 in services. The largest portion of spending (\$12,668,477) was on conventional shelters, with \$1,302,011 going to day centers and \$182,586 to severe weather shelter provision. While detailed spending data is not available for Clackamas and Washington County, if we assume that it costs the same amount to serve individuals in those counties, we can estimate total and per capita spending in each. In Clackamas County, according to data provided for the Annual Homeless Assessment report (AHAR) to Congress over the year between October 1st 2016 and September 30th 2017, 619 persons (17% are in families) were served in emergency shelters, implying an expense of \$1,056,633. In Washington County over the same time period, data collected for the same purpose identifies 480 individuals served (85% are in families), for an estimated total expense of \$819,360. Summing for the tri-county region, the estimated total spending on emergency shelters is \$17,244,388. This number can be considered low, as it does not include the cost of capital: i.e., the actual costs of shelter construction. Multhomah County budgeted an additional \$7.4M for shelter construction expenses in 2017 alone, and this expense and others like it from various sources are not included in the above estimates.

While we utilize Multnomah County spending on emergency shelters as a proxy to extrapolate per capita costs in Clackamas and Washington Counties, it is important to note that the household composition of those served in emergency shelters ranges widely across geographic areas, and can impact the costs of providing emergency shelters and services. These differences may be attributed to pre-existing differences in the overall homeless population household composition in each of the three counties. Other contributing factors may include the specific type of shelter that is available, whether there is programming specifically targeting families, or a potential self-selection among those who are more likely to seek shelter and assistance.

Conclusions

This section has laid out potential costs for massive social programs, for the purpose of enhancing public discourse and providing initial benchmarks for the consideration of policies like these. A secondary purpose of this document is to emphasize the considerable uncertainties faced when dealing with data related to the constantly shifting population experiencing homelessness or housing insecurity at any given time. For that reason, all numbers provided here are, of course, estimates. Without knowing the size of the true population, costs are unknown. Additionally, there are few reports of this kind that approach hypothetical scenarios with the goal of addressing the fullest possible scope of the target population, and a high level of assistance, rather than focusing on a certain amount of feasible revenue or policy change.

By using the most straightforward and replicable approach possible, based on previous local work in the field and expert consultation, this section first estimates that there are over 38,000 homeless individuals in the Portland tri-county area, including those who are doubled up in housing situations that are not intended to hold multiple households. Additionally, it is estimated that over 5,600 of those individuals suffer from disabilities that require permanent supportive housing.

The section estimates a cost of \$2.6 billion to \$4.1 billion to house all homeless individuals who require permanent supportive housing for ten years, and to provide complete rent assistance and services to those who do not require permanent supportive housing for two years.

Next, the potential costs of issuing universal housing vouchers in order to assist those at risk of becoming homeless are assessed. A framework based on ACS and HUD data is implemented to estimate the costs to providing said vouchers (which cover all housing expenses in excess of 30% of a household's income) at varying levels of income and rent burden. Administrative costs for the rent assistance program are included as well. The final estimates range from \$6.2 billion over ten years, if only those earning lower than 30% of the MFI and paying greater than 50% of their rent are included; up to \$21 billion, if the hypothetical rent assistance includes all households earning up to 80% MFI and paying more than 30% of their income to rent.

Finally, the supply and demand of affordable rental housing in the tri-county area are determined, in order to locate specific areas of shortage and surplus based on income level and housing type and size. All of these elements provide a large-scale, top-end set of costs and economic estimates that can be used to inform public discourse and prioritization.

In the next section we examine revenue-raising options for the local region.

III. REVENUE-RAISING OPTIONS

The previous section of this report estimated the potential cost of providing the supports, services and housing necessary to eliminate homelessness and rent burden in Clackamas, Multnomah, and Washington counties. This section examines revenue sources available to local

governments that could fund these solutions, describes various governance challenges inherent in public projects of this magnitude, and provides estimates of necessary tax rates and fees to reach \$100 million in tax revenue by revenue source.

Typical criteria for analyzing policies and revenue generation options from an economic perspective include: efficiency, equity, effectiveness, and political feasibility (see sidebar for definitions). However, each of those criteria depend on the specific policy. Since this section of the report only discusses policies in their broadest sense, economic impacts are left for future analysis when more policy details are known.

In particular, we urge a robust consideration of the equity of any revenue proposal. A key component of equity is a tax policy's regressivity, or how much of the tax burden is borne by the poor. A highly regressive tax would put more financial stress on those with the highest risk for becoming homeless, potentially undermining the policies and programs discussed in the first part of this

Economic Criteria

Efficiency: The most common economic criteria, efficiency signifies the relationship between costs and outputs. An efficient policy would produce the most output (e.g. affordable units) for the least cost (e.g. tax dollars) compared to feasible alternatives.

Equity: Equity captures the concept of fairness, and is typically used with regards to the distribution of resources across a population. An inequitable policy would distribute goods "unfairly" across income groups, race, or other category.

Effectiveness: Effectiveness refers to how well the policy objectives are met. Often confused with efficiency, effectiveness is about doing "the right thing", while efficiency is about "doing the thing, right".

Political Feasibility: How likely the policy will succeed in the political arena.

report. Sales taxes are considered regressive because the cost of all goods increase, taking a larger percentage of income from poorer taxpayers. States sometimes dampen this effect by exempting necessities—such as food—from the tax. This illustrates that the specifics of any policy would need to be considered before any useful comparisons could be made. For example, an income tax could be constructed with progressive tax brackets (as it is at the Federal level) or proportionally with a flat tax rate (as is the case in many states). Similarly, a gross receipts tax could be considered either regressive or progressive depending on what businesses have to pay the tax.

Key Takeaways

We identified the following key takeaways:

- Any revenue-raising option should account for equity and regressivity. A decision-making framework driven by careful analysis of disparate impacts on different demographic and geographic groups must be part of any revenue-raising measure. Revenue raising should not worsen circumstances for marginalized community members.
- Raising revenue across the tri-county area will lead to greater coordination, and a firm commitment for all relevant actors; however, greater levels of coordination will take more time to implement. Note that Metro's boundaries do not extend to all of the counties' boundaries.
- There are multiple ways for localities to raise revenue. We focused on eleven possible tax options. The summary table of those options follows:

Tax Policy	Description	Relevant examples	Tax Base	Tax Rate/Fee to reach
				\$100 Million
Corporate Tax	A tax on business profits	Exists in Oregon, Multnomah County, and Portland	Clackamas and Washington County Business Profits	\$91.5 million by expanding Multnomah BIT to Clackamas and Washington
Business License Tax or Fee	A fee charged per establishment	City of Portland Business License Tax	Business Fee	\$1,755.54
Gross Receipt Tax	A tax on business revenue	City of Portland and San Francisco	Business Revenue	0.055% (0.056% excluding groceries)
Sales Tax	A tax on a good or service levied at the point of sale	Does not exist in Oregon, but most other states	Price of Purchased Goods	1.45%
Individual Item Tax/Luxury Tax	A tax on a specific good, levied at the point of sale	Exists in Oregon in the form of sin taxes	Retail Price of the Good (Unit or Ad Valorem)	Varies significantly by good (see pg. 107 for details)
Flat Rate Tax	A tax on individual income	Portland Art	Tax filers	\$119.78 per taxpayer
Payroll Tax	A tax on wages paid out by all businesses	TriMet Payroll and Self-Employment Tax	Payroll Wages	0.176%
Income Tax on the Highest Earners	Increases in income tax rate for top earners	California "Millionaire's Tax"	Tax filers with AGI over \$250 thousand	0.505% of adjusted gross income
Bond Measure	Funded through an increase in property taxes	Metro Affordable Housing Bond Measure	Assessed Property Values	
Reset Assessment of Commercial Assessed Values	Increase in taxable property value		Commercial Properties	\$352 million in revenue from Multnomah County alone

Table 3.1: Revenue-raising options summary

Real Estate Transfer Tax	A tax on property	Washington County Transfer Tax	All Property Sales	\$6.52 per \$1,000 in
	sales and transfers			sale value

What Constitutes Revenue

Before discussing potential revenue streams, it is important to define what counts as revenue in the context of this report. The revenue streams discussed below only work for the costs of homelessness assistance or rent burden relief. Tax revenue policies that include funds for multiple uses, such as K-12 or parks and recreation, might gain greater political support. Rather, we address taxes which have a specific expenditure requirement in Oregon—e.g. gasoline taxes. This report only includes those revenue streams that could be applied to homelessness. Policies or programs that do not explicitly raise revenue—such as a declaration of a public health emergency—are also excluded.

Revenue Sources

Of the revenue sources available to regional and regional governments, taxes provide the most revenue,175 and are the focus of this report. Pertinent taxes include:

- Corporate income taxes
- Gross receipt taxes
- Sales taxes
- Individual item taxes (e.g. Coffee tax)
- Income taxes
- Property Taxes and Bond measures

These are broken down in more detail below; however, it is important to note that many of these forms of taxes exist in the Portland Metro area and its constituent counties already. This highlights a challenge: coordinating additional taxes and spending across Clackamas, Multnomah and Washington counties under the constraints of various legal requirements placed upon Oregon's governing bodies.

Governance

Governing revenue-raising effects is an important part of administering how raised revenue is spent. There are several ways the three Portland Metro counties can go about raising revenue. First, each county could act independently. This requires the least coordination which makes it the most easily adoptable strategy, and would allow programming and services for all parts of

¹⁷⁵ Theoretically, any source of revenue could provide enough revenue, however fees or taxes on relatively few individuals would require a prohibitively high value to generate the \$100 million objective (e.g. business license fees/jewelry tax).

the county. Unfortunately, this lack of coordination makes it more difficult to coordinate the spending side and raises the possibility that enough revenue is raised in one county but not enough in another. Second, the region's local governing body—Metro—could raise the revenue and operate the spending program for the three counties. This removes the coordination problem, but may require a charter review of Metro's scope and will not serve all of the counties' geographies.¹⁷⁶ Lastly, the three counties could form a new Special Service District to address homelessness; however, special districts can only be for specific services (housing or homelessness is not listed as an option).¹⁷⁷ The requirements for creating a special district are many, and would likely take some time to fulfill.¹⁷⁸

Revenue Sources

This section describes eleven potential revenue sources with a focus on how various governing bodies have utilized them and estimates for what the rate/fee would have to be to reach \$100 million in tax revenue (for feasible sources).

Corporate Income Taxes

Corporate taxes are taxes on business profits (net income). Oregon's state government exacts a corporate tax on C-corporations and, more pertinently, the City of Portland and Multnomah County also exact corporate taxes (on C-corporations and other business types).¹⁷⁹ The income that Portland and Multnomah treat as taxable is based on the business's proportion of gross receipts in the area, relative to its activities everywhere else, and the tax is paid based on net-income (profit).¹⁸⁰ Portland's rate of 2.2% and Multnomah County's rate of 1.45% generated \$134 million¹⁸¹ and \$93.4 million¹⁸² in fiscal year 2018, respectively. Businesses with less than \$50,000 in gross receipts from all activities everywhere are exempt from this tax.

176 Metro's district boundary does not match county boundaries. The affordable housing bond can only be spent within the boundaries.

177 Oregon Secretary of State Bev Clarno. (n.d.) *Special service districts*. Retrieved from https://sos.oregon.gov/blue-book/Pages/local/other-special.aspx

178 Oregon Legislature. (2017). Chapter 198. Special districts generally miscellaneous matters 2017 edition: Special districts generally. Retrieved from

https://www.oregonlegislature.gov/bills_laws/ors/ors198.html

179 Portland's corporate tax is called the City of Portland Business License Tax, while Multnomah's is called the Multnomah Business Income Tax (<u>https://www.portlandoregon.gov/revenue/article/216081</u>). Despite the different names, they operate similarly.

180 Wingard, R. & Freeman, C. (2013). *Portland and Multnomah Business Tax*. Retrieved from: https://www.osbplf.org/assets/in_briefs_issues/Portland%20Multnomah%20Business%20Tax%20April%2 02016%20In%20Brief.pdf

181 Rinehart, T. & Cooperman, J. (2018). *Comprehensive annual financial report for the fiscal year ended*. Bureau of Revenue and Financial Services, p 3. Retrieved from <u>https://www.portlandoregon.gov/omf/article/701632</u>.

182 Multnomah County, Oregon. (2018). *Comprehensive annual financial report*, p 6. Retrieved from https://multco.us/file/77203/download

Options for generating revenue through a corporate income tax include: 1) the adoption of a similar corporate tax in Clackamas and Washington Counties; 2) increasing the corporate taxes in Multnomah and Portland; or, 3) some combination of both. However, there are a few problems in adopting this approach. Currently corporate taxes are not earmarked for particular spending in Multnomah or Portland, and there is no guarantee new revenue would be spent on homelessness unless the current law was changed, or the new tax structure was treated independently. Similarly, it would be difficult to coordinate both the new corporate tax system and spending on homelessness without the direction of Metro or another new Special Service District, since each of the counties would have to pass and manage the legislation separately. This could lead to businesses locating to the county with the smallest corporate tax rate.183 However, there are certain revenue generation structures—such as the urban renewal districts—that have dedicated special funds.184 In these cases, expenditures are earmarked very specifically, which can be beneficial from the standpoint of political accountability; however, the restrictions remove flexibility.

Since a corporate tax already exists for Multnomah County, adopting a corporate tax in Washington and Clackamas Counties has slightly less revenue potential. To generate an estimate of the extra revenue from expanding Multnomah's Business Income Tax to the other two counties, we first assume that any additional revenue would be proportional to the wages paid out in that county. In other words, if the wages in one county are 50% of the wages of Multnomah, then that county would generate 50% of the business income tax revenue of Multnomah County. Using this method, we estimate that expanding the Business Income Tax of 1.45% to Clackamas and Washington Counties would result in \$91.5 million in revenue.

Another option is to charge a flat business license tax (or fee) to businesses above a certain level of revenue. Revenue and establishment counts for Oregon are aggregated for the entire state. To focus the counts to the three counties, we assume that establishments are distributed according to wage payments. In other words, since 59.1% of Oregon wages are paid within the area, we assume the three counties also account for 59.1% of Oregon business establishments. This amounts to around 57,000 of the state's over 96,000 establishments. The table below shows the rates required to generate the desired \$100 million in tax revenue, broken down by level of sales. To generate \$100 million in annual revenue for homelessness spending, each business would need to be charged \$1,755 per year, with payments dramatically increasing if only charged to businesses with higher sales (see figure below). Because businesses above this level of sales are likely to be more concentrated within Multnomah, Clackamas, and Washington Counties, the higher business license fees are likely to be overestimates to some degree.

¹⁸³ Papke, L. (1991). Interstate business tax differentials and new firm location: Evidence from panel data. *Journal of Public Economics*, 45(3), 47-68.

¹⁸⁴ Prosper Portland. (2019). Urban Renewal [web page]. Retrieved from https://prosperportland.us/what-we-do/urban-renewal/

Business License Tax Base	Fee per Business
All Corporations	\$1,755.54
Corporations with over \$25 million in revenues	\$99,542.86
Corporations with over \$50 million in revenues	\$199,437.88
Corporations with over \$100 million in revenues	\$428,160.31

Table 3.2: Business License Fees

Gross Receipt Taxes

Like corporate taxes, gross receipt taxes are also charged to businesses. The key difference is that instead of taxing profits, the tax is on total revenue. This leads to a different group of business being taxed. Under a corporate tax, industries with large profit margins (such as the financial industry) tend to bear more of the burden. Under a gross receipts tax this is flipped, and low-margin industries (such as the retail industry) tend to carry more of the weight.

In 2018, the City of Portland passed the Portland Clean Energy Community Benefits Initiative which "requires large retailers (those with gross revenues nationally exceeding \$1 billion, and \$500,000 in Portland) to pay a surcharge of 1% on gross revenues from retail sales in Portland, excluding basic groceries, medicines, and health care services. This is expected to generate between \$54 million and \$71 million in revenue annually once the program is underway. Since its funds are already earmarked for community-level energy efficiency programs, it cannot be expanded upon to raise revenue to combat homelessness. However, this policy does provide a framework for a new tax as well as an idea of how much revenue could potentially be generated.

The Oregon Corporate Activity Tax (CAT) provides a recent example of a gross receipts tax reserved for specific use. Passed in May 2019, the CAT levies a fee of \$250 plus 0.57% of all taxable commercial activity over \$1 million. This is estimated to secure roughly \$1 billion annually for early learning and K-12 education statewide. It is important to note that this bill may preclude specific forms of GRTs for localities, and that this analysis offers no interpretation of what types of policies are currently allowed.

The City of San Francisco recently passed a gross receipts tax on businesses with more the \$50 million of revenue in San Francisco. It is estimated that 300–400 businesses will be subject to the tax, and that it would raise \$250 million–\$300 million and is operative as of January 1_{st},

2019.185 186 Notably, these funds are specifically earmarked to combat homelessness. One concern for reproducing such a tax in the Portland Metro region would be that the two areas have vastly different corporate tax bases, and so the revenue threshold would need to be lowered to achieve a significant source of funding at the same tax rate.

Similar to the business license fee estimates above (page 108), we assume 59.1% of sales revenue occurs within the area to pare down Oregon Department of Revenue aggregate sales revenue to the local level. To generate \$100 million, the three counties would need to charge a rate of 0.055% if applied to all corporations.

Gross Receipts Tax Base	Gross Receipts Tax Rate
All Corporations	0.055%
Corporations with over \$25 million in revenues	0.084%
Corporations with over \$50 million in revenues	0.098%
Corporations with over \$100 million in revenues	0.120%

If only corporations with over \$50 million in revenue, as in San Francisco, the required rate would be 0.098% of gross revenue. This could be an overestimate, as businesses with higher revenues may be more concentrated within Multnomah, Clackamas, and Washington Counties.

185 City and County of San Francisco. (2018). *Homelessness gross receipts tax.* Retrieved from https://sfcontroller.org/sites/default/files/Documents/Economic%20Analysis/hgrt_economic_impact_final.p df

186 City and County of San Francisco Treasurer and Tax Collector. (2019). *Homelessness gross receipts tax*. Retrieved from <u>https://sftreasurer.org/homelessness-gross-receipts-tax-ordinance</u>

Sometimes groceries are exempt from gross receipt taxes. Using the national ratio of grocery store revenue to all revenue from 2017 (2.1%)₁₈₇ and assuming that all grocery retailers gross over \$100 million in revenue, NERC estimated that the tax rate on all corporations would be 0.056% to reach \$100 million.

Gross Receipts Tax Base (Excluding Groceries)	Gross Receipts Tax Rate (Excluding Groceries)
All Corporations	0.056%
Corporations with over \$25 million in revenues	0.086%
Corporations with over \$50 million in revenues	0.102%
Corporations with over \$100 million in revenues	0.125%

Table 3.4: Gross Receipt Taxes (excluding groceries)

Sales Taxes

A sales tax is a tax on the price of a good or service that, unlike a gross receipts tax, is levied at the point of sale. Oregon is one of five states with no sales taxes and has voted down potential sales taxes nine times.¹⁸⁸ However, there is no law preventing local jurisdictions from adopting a sales tax, even if the state has no such structure. The range of potential revenue raised by a new sales tax is large and is dependent on the size of the base (how many counties or municipalities participate) and the tax rate.

One example of how sales taxes have been used to combat homelessness is Los Angeles County's Measure H. This bill raised sales taxes by one quarter of a cent which, due to the size of the tax base in Los Angeles, is estimated to bring in about \$355 million a year.¹⁸⁹ This tax, which went into effect October 2017, is on all sales and the revenue it generates will be used to provide services for the homeless.

Using sales tax data from Texas, a rich source of tax revenue data, we scale the sales tax revenue per person within Austin, to provide an estimate of the revenue from a potential local sales tax. Austin was chosen as its income levels are relatively similar to those of the Metro area, and charges a 1% sales tax on top of Texas's rate of 6.25%. Within the three counties, a sales tax rate of 1.45%, or 1.45 cents per \$1, would generate \$100 million in tax revenue.

187United States Census Bureau. (2017). *Annual retail trade survey.* Retrieved from https://www.census.gov/data/tables/2017/econ/arts/annual-report.html

¹⁸⁸ Oregon's long history of saying no to sales tax. (2019). *Oregon Public Broadcasting*. Retrieved from <u>https://www.opb.org/news/widget/oregons-history-with-sales-tax/</u>

¹⁸⁹ Chiland, E. (2017). Updated: LA County voters approve Measure H: Here's how higher taxes will help the homeless. *Curbed LA*. Retrieved from https://la.curbed.com/2017/3/8/14855430/los-angeles-election-results-ballot-measure-h

Individual Item Taxes

Specific goods can also face a tax through either a unit excise tax (per unit) or an ad valorem excise tax (based on percentage). One type of individual item tax is known as a "sin tax." A sin tax has the dual purpose of both raising revenue and, since the associated goods are typically seen as harmful, curbing consumption of the good. Tobacco, alcohol, and marijuana are examples of goods with sin taxes. Over the 2016–2017 fiscal year in Oregon, the cigarette tax raised over \$205 million, taxes on beer and wine raised over \$18 million, and the tax on marijuana raised over \$74 million.¹⁹⁰

However, an individual item tax does not need to be on a harmful good. For example, the Oregon Legislature briefly considered a coffee tax in 2017.¹⁹¹ One difficulty with individual item taxes is that legislatures often seek to tie the source of revenue to the purpose for raising it. For example, the Portland Gas Tax is used for road repairs, pedestrian safety, and the like.¹⁹² The amount of revenue generated by an individual item tax can range from inconsequential to very significant, depending on the good, the tax base, and the tax rate. One specific example is the sugary drink tax that is now in place in a number of cities. For example, Philadelphia's tax of sweetened beverages at a rate of \$0.015 per ounce produced \$78.8 million over 2018.¹⁹³

To give a ballpark figure for how much an individual item tax could raise in Portland, consider a \$0.05/unit excise tax on coffee. Assuming that every adult in the tri-counties (1,459,274 as of July 2018)₁₉₄ buys on average one cup of coffee a week, then that would generate \$3.8 million in revenue on an annual basis.

Luxury Taxes

Luxury taxes are a subset of individual item taxes levied only on goods deemed non-essential. This typically take the form of an ad-valorem tax and is passed to the consumer at the point of sale. For example, the U.S. imposed a nation-wide 10% luxury tax in 1990 on several products including private boats, jewelry and furs. Each good was only considered a luxury item after a

190 Legislative Revenue Office. (2018). 2018 Oregon Public Finance: Basic Facts, Retrieved from https://www.oregonlegislature.gov/lro/Documents/2018%20FINAL%20-1.pdf

¹⁹¹ CBS News. (2017). Oregon legislature considers coffee tax, officials say. *CBS*. Retrieved from https://www.cbsnews.com/news/oregon-legislature-considers-coffee-tax/

¹⁹² Njus, E. (2018, February). Portland gas tax brings in more than expected. *The Oregonian*. Retrieved from https://www.oregonlive.com/commuting/2018/02/portland_gas_tax_collects_more.html

¹⁹³ Burdo, A. (2018, January). First full year of soda tax revenue puts city \$13M+ short of goal. *Philadelphia Business Journal.* Retrieved from

https://www.bizjournals.com/philadelphia/news/2018/01/26/philly-beverage-tax-soda-tax-pbt-2017-year-revenue.html

¹⁹⁴ Population Research Center. (2019). Population estimates and reports. Portland State University, College of Urban and Public Affairs. Retrieved from https://www.pdx.edu/prc/population-reports-estimates

certain value (i.e. jewelry and furs costing over \$10,000).195 However, these taxes were collectively repealed by 2002.

Today, there are few remaining states with outright luxury taxes. New Jersey implemented a Luxury and Fuel Inefficient Vehicle Surcharge in 2006. Under this tax, new vehicles priced over \$45,000 or that have an EPA rating less than 19 miles per gallon are charged an additional 0.4%.¹⁹⁶ Some states, like California, tax luxury items such as boats and aircraft as property based on market value of the vessel.¹⁹⁷ There is little uniformity among "luxury taxes" and most states do not collect revenue data from their luxury items separate from their general sales and use taxes. This makes any quantitative analysis of the revenue potential difficult. Moreover, there is little evidence that any state without a general sales tax has successfully imposed a luxury item tax. Montana came the closest with their 2017 "Ferrari tax" which would have imposed a 0.08%–1.0% tax on all new vehicles sales over \$150,000. However, this version of the bill did not actualize and instead was settled with an increase in vehicle registration fees. As of today, none of the five states without a statewide sales tax have imposed a luxury item tax.

Keeping the above challenges in mind, we calculated the rate a potential luxury item tax would need to be charged to reach \$100 million in revenue using Illinois Department of Revenue Sales Tax Statistics for fiscal year 2018.¹⁹⁸ The data is divided by standard industrial classification (SIC) codes, of which we analyzed several goods that fall reasonably into the definition of luxury (jewelry, recreational vehicles, motorcycles, etc.). First, we analyzed jewelry stores, as this industry had the highest state sales tax revenue of all the "luxury" industries in FY 2018. We took the roughly \$32 million in state tax revenue, scaled it up by the 6.25% state tax rate, and then proportioned it down to what might be feasible to generate within Clackamas, Multnomah, and Washington counties—this came out to roughly \$74 million. In order to generate enough revenue to meet our \$100 million goal, all goods within this industry would need to be charged a 135.2%.

Next, we combined the revenue for each "luxury" good industry and performed a similar analysis. These industries are: jewelry, aircraft, boats, motorcycles, and R.V.s. This resulted in an estimated \$136 million in sales for the tri-county area. Again, to reach our target revenue this would require a tax rate estimated at 73.6%. We emphasis that spending patterns on these items vary state by state and that this analysis is based on rough data that does not account for the consumer response to higher prices (which would be significant).

197 Los Angeles County. (2019). Boats and aircraft: Other property [web page]. Retrieved from https://assessor.lacounty.gov/boats-and-aircraft/

198 Illinois Revenue. (2018). Sales tax statistics by annual year. Retrieved from https://www2.illinois.gov/rev/research/taxstats/SalesTaxStatistics/SitePages/SalesTaxYear.aspx?rptYear =2018

¹⁹⁵ United States General Accounting Office. (1992). *Tax policy and administration: Luxury excise tax issues and estimated effects* [PDF file]. Retrieved from https://www.gao.gov/assets/220/215770.pdf
¹⁹⁶ State of New Jersey. (2017). *Luxury & fuel inefficient vehicle surcharge*. Retrieved from https://www.gao.gov/assets/220/215770.pdf

Income Taxes

Oregon is one of the many states that taxes income, which provides the primary source of revenue for the state government. One of the key methods for implementing an income tax is withholdings, which is managed through the payroll system. Counties or other jurisdictions have the option of increasing revenue by adding onto the current payroll tax, much like Multnomah County did in the early 2000s to increase funding for schools after state budget cuts.¹⁹⁹ Passed in 2003, this measure raised an estimated \$128 million annually for three years through a 1.25% income tax.²⁰⁰

Flat Rate Income Tax

A flat tax (or head tax) on income taxes individuals at a constant rate. A true flat rate taxes all individuals at the same level regardless of their income. In order to generate \$100 million in revenue using a head tax, each household in Clackamas, Multnomah, and Washington counties would be charged \$119.78, tacked on to their annual income filing. If levied at the individual level, the fee drops to \$54.38. Using Oregon Department of Revenue's 2017 report on income tax statistics, we calculated the household fee by dividing the \$100 million target revenue with the total number of returns filed for the three counties, and used the total population in similar process for the per capita head tax. The individual head tax would disproportionately affect families as each tax-filing member's fee would be multiplied how many dependents they claim. For example, a joint-filing family of five would pay a total of \$271.90 under this option.

Additionally, this tax is regressive as it taxes lower income individuals at higher rates than their higher earning counterparts. Under the household case, the bottom 20% of earners would pay an average of 0.70% more of their income than the top 20%, whereas the middle quintile would be responsible for 0.12% more than the top earners.

Proportional Income Tax

To mitigate these discrepancies we also analyze the case of a proportional tax (i.e. a head tax that varies across income levels). For this analysis we use U.S. Census Bureau's income quintile distribution for each county, alongside the Oregon income tax statistics employed in the previous section. We calculated a rate for each county that, when applied to the mean household income for each quintile, sum to generate the desired \$100 million across the tricounty area.

200 Multnomah County. (2003). *May 2003 special election - Multnomah County - Measure No. 26-48*. Retrieved from https://multco.us/elections/may-2003-special-election-multnomah-county-measure-no-26-48

¹⁹⁹ Dillon, S. (2003). Portland voters approve Oregon's only county income tax, aiding schools. The New York Times. Retrieved from https://www.nytimes.com/2003/05/22/us/portland-voters-approve-oregon-s-only-county-income-tax-aiding-schools.html

To illustrate using Multnomah County, each household would be charged 0.14% of the mean income for their respective quintile. This amounts to a \$17.15 tax for the bottom 20%, \$84.98 charged to the middle 20%, and a \$299.82 flat tax levied on those in the top income group. The rates are similar for Clackamas and Washington counties, each requiring a 0.13% income tax to produce their share of the target revenue. While this proportional flat tax remains regressive within each quintile group, it negates the variation between income quintiles seen in the analysis of a true flat tax.

Income Tax on Highest Earners

In 2010, Oregon voters passed two referenda, Measure 66 and 67, that increased taxes for businesses and high-earning households. Measure 66 increased the tax rate to 9.9% for joint-filers earning more than \$250,000 and for single-filers with an income higher than \$125,000 in order to help make up for the state budget deficit following the recession.²⁰¹ Along this line of thinking, we have calculated how much the tax rate on top earners would need to increase in order to cover \$100 million in revenue for homelessness projects. Using Oregon Department of Revenue's 2017 Personal Income Tax Statistics, we found the aggregate adjusted gross income of those earning more than \$250,000 across the three counties was just over \$19.8 billion. To reach the target revenue this figure would be taxed at a rate of 0.505%, meaning the rate on the 33,770 top earning households across the tri-county would need to increase to roughly 10.41%.

California is one state leading the charge on aggressive tax hikes for high income earners. Their "millionaires' tax," passed in 2005, increased their highest rate to 10.3% for those in the top income threshold. This rate was further increased to 13.3% in 2012, the highest rate in the country. This increase raised an estimated \$8.1 billion for budget year 2018–2019₂₀₂.

Payroll Tax

Payroll taxes are paid by employers based on their employees' wages. The TriMet Payroll and Self-Employment Tax is an example of a local application of a payroll tax. Currently, employers pay 0.7637% of wages toward mass transit district funds.²⁰³ While the TriMet Tax applies only to businesses within their service area, applying the payroll tax to the three counties expands the tax base, allowing for relatively lower tax rates. A payroll tax of 0.176% on wages paid within Clackamas, Multnomah, and Washington Counties would raise the desired revenue for

State of Oregon. (2009). *Measures 66 and 67*. Legislative Revenue Office. Retrieved from https://www.oregonlegislature.gov/lro/Documents/11-19-09%20RR%206-09%20Measures%2066-67.pdf
Tharpe, W. (2019, 7 February). Raising state income tax rates at the top a sensible way to fund key investments. *Center on Budget and Policy Priorities*. Retrieved from https://www.cbpp.org/research/state-budget-and-tax/raising-state-income-tax-rates-at-the-top-a-sensible-way-to-fund-key#_ftn1
Oregon Department of Revenue. (n.d.) Payroll tax basics: Understanding basic requirements for reporting and paying Oregon payroll taxes [PowerPoint slides]. Retrieved from https://www.oregon.gov/DOR/programs/businesses/Documents/PayrollSlideshow.pdf

homelessness programs. Using 2017 QCEW data, we assume the shares of wages by establishment size for the entire US is representative of the local area. The table below displays our estimates of this rate if only applied to establishments above a certain size. For example, a tax of 0.264% charged on the payroll of establishments with 50 or more employees would generate \$100 million in homelessness project revenue.

Establishment Size Tax Base	Payroll Tax Rate	
All Establishments	0.176%	
Establishments with 5 employees or more	0.186%	
Establishments with 10 employees or more	0.198%	
Establishments with 20 employees or more	0.219%	
Establishments with 50 employees or more	0.264%	
Establishments with 100 employees or more	0.319%	
Establishments with 250 employees or more	0.446%	
Establishments with 500 employees or more	0.612%	
Establishments with 1,000 employees or more	0.881%	

Table 3.5: Payroll Taxes

To generate the desired revenue, a tax of wages only at establishments with 50 employees or more would require a rate of 0.264%, while a tax of wages at only the largest classification of establishments would require a rate of 0.881%, or \$8.81 per \$1000 in wages.

Property Taxes and Bond Measures

Property taxes are the primary source of revenue for local governments in Oregon, and can be used to generate revenue through bond measures such as Oregon Metro's Affordable Housing Bond.²⁰⁴ This bond raises \$653 million in revenue, which will be used to provide affordable housing within the Metro region (for more information, see the previous section). To pay for the bond, property taxes were raised by \$0.24 per \$1,000 in assessed value (which comes out to about \$60 for every \$250,000 of assessed home value (AV)).²⁰⁵ A major piece of legislation that allowed for this bond was Measure 102, which amends the state constitution to allow government entities to use revenue from affordable housing bonds toward public-private development partnerships.

Metro. (2018). Affordable homes for greater Portland [web page]. Retrieved from: https://www.oregonmetro.gov/public-projects/affordable-homes-greater-portland
Oregon Live. (2018). \$653 million Metro affordable housing bond passes: Election results 2018. The Oregonian. Retrieved from https://www.oregonlive.com/politics/2018/11/2018_metro_affordable_housing_bond.html

Calculating Property Taxes

Calculating the actual tax due for a household can be complicated due to the multiple rates and valuation methods. The calculation begins with the comparison of two values, based on a property's AV and RMV. The Measure 5 cap is 1.5% of current RMV (1% for general government taxes and 0.5% for educational taxes). Based on its location in various taxing districts. each property will have a limited government tax rate and a limited education tax rate. The sum of these rates is then multiplied by the AV to calculate the base tax. If the calculated base tax exceeds the Measure 5 cap, any temporary voter-approved property tax measure for specific services (such as increased funding for public safety, libraries or schools) is reduced first, all the way to \$0 if necessary. If the taxes still exceed Measure 5 caps, each permanent tax rate component within the base tax is then compressed proportionally such that the base tax will equal the Measure 5 cap.

In order to calculate final taxes, the bonded general government and bonded education rates, which fund capital construction projects, such as new buildings or equipment, are multiplied by the AV and added to the base tax. These bonded rates are not subject to the property tax caps. Typically property taxes are capped at 1.5% of the property's real market value (RMV) due to Measure 5. However, Measure 5 does not apply voter-approved bond levies used for capital construction.206 It is also possible to directly raise property taxes through a local option instead of going through a bond measure. This tax scheme also requires voter-approval and, unlike bonds used for capital construction, would be subject to Measure 5 and Measure 50. Since some properties are already at the 1.5% cap, not all properties will be subject to the full rate increase—a phenomena known as compression. For more information on Measures 5 and 50, see the sidebar.

Resolving a portion of the difference between the AV and RMV of select properties is one potential method of raising the required revenue. As of 2017, commercial buildings in Multhomah County are only taxed on 37% of their current RMV due to the taxable value growth limits imposed by Measure 50. Increasing the taxable values of these properties alone to their RMV would raise, an extra \$352 million in tax revenue, after accounting for compression. While extending this estimate to all three counties is difficult due to the concentration of commercial properties within Multnomah County, it is clear that resetting just a fraction of the taxable value difference would generate considerable revenue. However, implementing the policy would require a regional waiver from the Measure 50, likely putting the issue to a vote.

Another option is to adopt a real estate transfer tax similar to that imposed within Washington County. Currently, the county taxes property sales and transfers at a rate of \$1 per \$1,000 of sale price, split between the buyer and seller. In the 2017-18 tax year, this generated \$6.5

²⁰⁶ Oregon Department of Revenue. (n.d.). How property taxes work in Oregon [web page]. Retrieved from <u>https://www.oregon.gov/dor/programs/property/pages/property-taxes.aspx</u>

million in revenue.²⁰⁷ Using this data, 2017 Multnomah County Assessor data, and extrapolating to Clackamas County proportionally using QCEW wages, we estimate that \$15.3 billion in properties were sold in 2017. According to this estimate, the region would need to tax transfers at a rate of \$6.52 per \$1,000 in sale price to generate the desired revenue, or around \$652 per \$100,000 in home value. Unfortunately, implementing such a tax is not likely feasible, as Measure 79 of Oregon's constitution, passed in 2012, prohibits state and local governments from imposing transfer taxes, except those in effect at the end of 2009.

Similar to Metro's Affordable Housing Bond, Los Angeles County's Measure HHH was a \$1.2 billion bond measure to fund affordable housing, that increases property taxes by an average of about \$33 per year.₂₀₈ We summarize the tax options below.

Tax Policy	Description	Relevant examples	Tax Base	Tax Rate/Fee to reach \$100 Million
Corporate Tax	A tax on business	Exists in Oregon,	Clackamas and	\$91.5 million by
	profits	Multnomah County,	Washington	expanding Multnomah
		and Portland	County Business	BIT to Clackamas and
			Profits	Washington
Business	A fee charged per	City of Portland	Business Fee	\$1,755.54
License Tax or	establishment	Business License		
Fee		Tax		
Gross Receipt	A tax on business	City of Portland and	Business	0.055% (0.056%
Tax	revenue	San Francisco	Revenue	excluding groceries)
Sales Tax	A tax on a good or	Does not exist in	Price of	1.45%
	service levied at	Oregon, but most	Purchased	
	the point of sale	other states	Goods	
Individual Item	A tax on a specific	Exists in Oregon in	Retail Price of	Varies significantly by
Tax/Luxury Tax	good, levied at the	the form of sin taxes	the Good (Unit	good (see pg. 107 for
	point of sale		or Ad Valorem)	details)
Flat Rate Tax	A tax on individual	Portland Art	Tax filers	\$119.78 per taxpayer
	income			
Payroll Tax	A tax on wages	TriMet Payroll and	Payroll Wages	0.176%
	paid out by all	Self-Employment Tax		
	businesses			
Income Tax on	Increases in	California	Tax filers with	0.505% of adjusted
the Highest	income tax rate for	"Millionaire's Tax"	AGI over \$250	gross income
Earners	top earners		thousand	

Table 3.6: Revenue-raising options summary

²⁰⁷Washington County Oregon. (2019). *Proposed budget detail program Fiscal Year (FY) 2019-2020*. [PDF file]. Retrieved from

https://www.co.washington.or.us/Support_Services/Finance/CountyBudget/upload/19-20-Proposed-Budget-Program.pdf

²⁰⁸ Chiland, E. (2016). Measure HHH: Angelenos ok \$1.2 billion bond to tackle homelessness. *Curbed Los Angeles*. Retrieved from https://la.curbed.com/2016/11/9/13574446/homelessness-ballot-measurehhh-housing-bond-pass

Bond Measure	Funded through an increase in property taxes	Metro Affordable Housing Bond Measure	Assessed Property Values	
Reset Assessment of Commercial Assessed Values	Increase in taxable property value		Commercial Properties	\$352 million in revenue from Multnomah County alone
Real Estate Transfer Tax	A tax on property sales and transfers	Washington County Transfer Tax	All Property Sales	\$6.52 per \$1,000 in sale value

Further Research and Conclusion

This has been a review of the various means local jurisdictions can raise revenue to address homelessness. This report did not delve into the various economic impacts of any of these tax policies. Doing so would require a specific policy from which the impacts could be modeled. Given the multiple additional burdens marginalized communities experience, and that these communities experience homelessness at higher rates, examining the equity impacts or regressiveness of any revenue measure is essential.

Policy does not happen in a vacuum. While each of these taxes are discussed in the context of homelessness, there also exists the option of coordinating with other priorities—such as increasing K-12 education funding—to establish new revenue streams. Further, decisions about what revenue measures to pursue, and how to structure them should take place in a transparent and inclusive manner. This section provides information and data about how to structure such a measure.

IV. CONCLUSIONS

In this report we examined approaches to collaborative and regional governance to address homelessness in the Portland tri-county region, costs to support people experiencing homelessness and housing insecurity, and possible revenue options for Oregon localities to explore. The purpose of this report was to provide community members, organizations, businesses, and governments with some of the building blocks to create a path forward in addressing homelessness and housing insecurity. This report does not provide answers to some of the most important questions, such as how do we make sure we do not end up in this situation again. Rather, the information in the report helps articulate how we create some stability for people while we also make plans to understand the underlying structural issues that shape our region. We look forward to creating those plans with the Portland region.

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https://files.hudexchange.info/resources/documents/HomelessDefinition_Recordkeeping RequirementsandCriteria.pdf

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Appendix - Glossary

Affordable Housing

Affordable housing can refer to a wide range of housing types and pathways to housing. In this report, we define housing as affordable when households pay less than 30% of their income on housing costs. Affordable housing may be developed and owned by the government, subsidized by the government and built by a private developer, or obtained through rent assistance to lease units on the private market. Some buildings might have a mix of market rate units and other units that are designated for specific moderate to lower income groups. Other affordable housing is "naturally occurring," meaning it is affordable to people with lower incomes without any type of intervention. Our focus is on whether community members can attain safe and quality housing based on their income at a level that promotes housing stability, and not on a particular type of affordable housing or unit type.

Chronic homelessness

HUD defines chronic homelessness as "an unaccompanied homeless individual with a disabling condition who has either been continuously homeless for a year or has had at least four episodes of homelessness in the past three years."²⁰⁹

Continuum of Care

HUD defines the Continuum of Care (CoC) program is designed to promote community-wide commitment to the goal of ending homelessness; provide funding for efforts by nonprofit providers, and State and local governments to quickly rehouse homeless individuals and families while minimizing the trauma and dislocation caused to homeless individuals, families, and communities by homelessness; promote access to and effect utilization of mainstream programs by homeless individuals and families; and optimize self-sufficiency among individuals and families experiencing homelessness."

Doubled Up

Families or individuals who live doubled up with friends or family members due to the loss of housing or economic hardship are considered homeless. Sometimes described as the hidden homeless, this population is not counted in Point-in-Time but included in Department of Education counts for unaccompanied youth or youth in families. Neither count includes doubled-up adult households. Doubled up can refer to a range of complex living arrangements.

Homeless

Government agencies employ multiple definitions of homelessness. For instance:

209 National Low Income Housing Coalition. (2019). HUD publishes final rule on definition of "chronic homelessness" [web page]. Retrieved from https://nlihc.org/resource/hud-publishes-final-rule-definition-chronic-homelessness

- HUD: To be described as homeless for HUD₂₁₀ reporting, an individual must fall into one of four categories. Those categories include: 1) an individual who lacks a fixed, regular, and adequate nighttime residence; 2) an individual who will imminently lose their primary nighttime residence; 3) unaccompanied children and youth or those in families who meet another federal statute's definition for homelessness and, 4) an individual fleeing domestic violence. While these 4 categories may sound somewhat broad, each category includes sub-criteria creating significant restrictions in being defined as homeless.²¹¹
- Department of Education: The DOE focuses on youth who are with families or unaccompanied. Under the McKinney-Vento Act, the first part of the definition starts out similarly to the HUD definition where homeless "means individuals who lack a fixed, regular, and adequate nighttime residence" (https://nche.ed.gov/mckinney-ventodefinition/). The second part of the definition includes all of the categories within the HUD definition as well as unaccompanied youth or children or those in families who: 1) are sharing someone else's housing due to economic hardship, loss of housing, etc. (commonly referred to as doubling up); and, 2) migratory children living in any of the situations described by HUD or the MVA (https://nche.ed.gov/mckinney-ventodefinition/).
- Health Resources and Services Administration: "an individual who lacks housing (without regard to whether the individual is a member of a family), including an individual whose primary residence during the night is a supervised public or private facility that provides temporary living accommodations and an individual who is a resident in transitional housing."212

Housing cost or rent burdened

According to HUD, "Families who pay more than 30% of their income for housing are considered cost burdened and may have difficulty affording necessities such as food, clothing, transportation and medical care." In addition to rent or mortgage payments, housing cost burden includes housing costs such as insurance and utilities.

Housing First

HUD defines Housing First as an "approach to quickly and successfully connect individuals and families experiencing homelessness to permanent housing without preconditions and barriers to

²¹⁰ U.S. Department of Housing and Urban Development [HUD]. (n.d.) Homeless definition [PDF file]. Retrieved from

https://files.hudexchange.info/resources/documents/HomelessDefinition_RecordkeepingRequirementsan_dCriteria.pdf

211 HUD does allow for people who are doubled up, or at risk of imminently losing their housing under several limited circumstances; however, the documentation required to demonstrate this are onerous. 212 U.S. Health Resources & Service Administration [HSRA]. (n.d.). Health center program terms and definitions [PDF file]. Retrieved from

https://www.hrsa.gov/sites/default/files/grants/apply/assistance/Buckets/definitions.pdf

entry, such as sobriety, treatment or service participation requirements. Supportive services are offered to maximize housing stability and prevent returns to homelessness as opposed to addressing predetermined treatment goals prior to permanent housing entry."213

Housing insecurity

In the American Housing Survey (AHS), a joint venture between HUD and the US Census Bureau, housing insecurity "encompasses several dimensions of housing problems people may experience, including affordability, safety, quality, insecurity, and loss of housing".214

Median income

Median income identifies the point where 50% of people make over that amount and 50% make less than that amount. Median income can be calculated for different groupings of people such as different geographies, family size, household size, race, etc. In this report, we use median family income (MFI) in our calculations. Determining who is described as low-income depends on what part of the income spectrum a family falls. If you make less than 80% MFI, you would be concerned low- or moderate- income.

Permanent Supportive Housing

HUD defines permanent supportive housing as permanent housing with indefinite leasing or rental assistance paired with supportive services to assist homeless persons with a disability or families with an adult or child member with a disability achieve housing stability.215

Point-in-Time Count

"The Point-in-Time Count provides a count of sheltered and unsheltered homeless persons on a single night during the last ten days in January"²¹⁶ in part to capture which individuals are unwilling or unable to access shelter. The count must be completed every two years by jurisdictions over a single night to avoid double counting. The guidelines for conducting the PIT Count differentiate between sheltered and unsheltered individuals, and require basic demographic breakdown.

215 U.S. Department of Housing and Urban Development [HUD]. (2019). Continuum of Care program eligibility requirements [web page]. Retrieved from https://www.hudexchange.info/programs/coc/coc-program-eligibility-requirements/

216 U.S. Department of Housing and Urban Development [HUD]. (2019). CoC homeless populations and subpopulations reports [web page]. Retrieved from https://www.hudexchange.info/programs/coc/coc-homeless-populations-and-subpopulations-reports/

²¹³ U.S. Department of Housing and Urban Development [HUD]. (2019). Continuum of Care program eligibility requirements [web page]. Retrieved from <u>https://www.hudexchange.info/programs/coc/coc-program-eligibility-requirements/</u>

²¹⁴ U.S. Department of Housing and Urban Development [HUD]. (n.d.) Measuring housing insecurity in the American Housing Survey [web page]. Retrieved from <u>https://www.huduser.gov/portal/pdredge/pdr-edge-frm-asst-sec-111918.html</u>

Unsheltered Homeless

HUD defines unsheltered homeless as people experiencing homelessness "who sleep in places not meant for human habitation (for example, streets, parks, abandoned buildings, and subway tunnels) and who may also use shelters on an intermittent basis."²¹⁷

217 U.S. Department of Housing and Urban Development [HUD]. (2008). A guide to counting unsheltered homeless people [PDF file]. Retrieved from https://files.hudexchange.info/resources/documents/counting_unsheltered.pdf

REGIONAL SUPPORTIVE HOUSING SERVICES Tri-County Data Scan



Prepared by Kristina Smock Consulting for



November 2020

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Introduction

In May 2020, voters approved a measure to raise money for supportive housing services for people experiencing homelessness or at risk of homelessness in Multhomah, Clackamas and Washington counties. The regional Supportive Housing Services (SHS) program will fund a range of homeless and housing services, including supportive housing, rapid rehousing, rent assistance, homelessness prevention, and wraparound clinical and social service supports.

Metro worked with its jurisdictional partners in June and July 2020 to compile baseline data from across the three counties to support regional planning for SHS implementation. County staff gathered and shared data on public funding, system capacity, outcome measures and programmatic cost estimates for homeless services in their counties. Additional information was compiled from each county's Continuum of Care applications, Housing Inventory Counts and Annual Performance Reports.

This report provides a cross-county summary analysis of the data. The analysis includes the entire scope of each county's homeless services, not just the area within Metro's service district. It offers a snapshot of the region's current homeless services landscape as a starting point to help inform further information gathering, analysis and decision making. It is intended as an internal document to support Metro and its jurisdictional partners in their SHS program planning work.

Public Funding

Each county was asked to provide data on the sources (federal, state or local) and amounts of all public funding for supportive housing, rapid rehousing, homelessness prevention, emergency shelter and transitional housing programs in their jurisdiction. The analysis in this section shows the funding data provided by each county, broken out by program area.

Public Funding	Multnomah	Washington	Clackamas	Total
Supportive Housing	\$38,628,151	\$5,769,658	\$4,239,884	\$48,637,693
Rapid Rehousing & Prevention ¹	\$34,188,197	\$1,963,541	\$2,209,027	\$38,360,765
Emergency Shelter	\$17,041,310	\$3,016,174	\$1,337,805	\$21,395,289
Transitional Housing	\$1,333,565	\$2,045,234	\$232,726	\$3,611,525
Total	\$91,191,223	\$12,794,607	\$8,019,442	\$112,005,272

The public funding across all three counties totals to more than \$112 million:

These figures primarily reflect the public funding that flows through each county's Continuum of Care and homeless services department. Counties also worked to compile data on relevant funding allocated through their local Community Action Agencies and Housing Authorities. Funding that is paid directly to service providers or reimbursed through Medicaid billing is not fully reflected in the data. None of the funding or system capacity data in the report includes COVID-related funding or programming.

The main sources of public funding captured in the data include:

Federal:

- Housing and Urban Development (HUD): Continuum of Care (CoC), Housing Choice Vouchers, Project Based Vouchers, Community Development Block Grant, Housing Opportunities for Persons with AIDS, Emergency Food and Shelter Program, Emergency Solutions Grant, Family Unification Program Vouchers
- HUD-Veterans Affairs: Veterans Affairs Supportive Housing, Supportive Services for Veteran Families
- · Health and Human Services: Runaway and Homeless Youth

State:

- Oregon Housing and Community Services: Emergency Housing Assistance, State Housing Assistance Program, Elderly Rental Assistance
- Oregon Health Authority: Medicaid, Medicare, State Mental Health Services Fund
- Oregon Department of Human Services
- Oregon Department of Justice

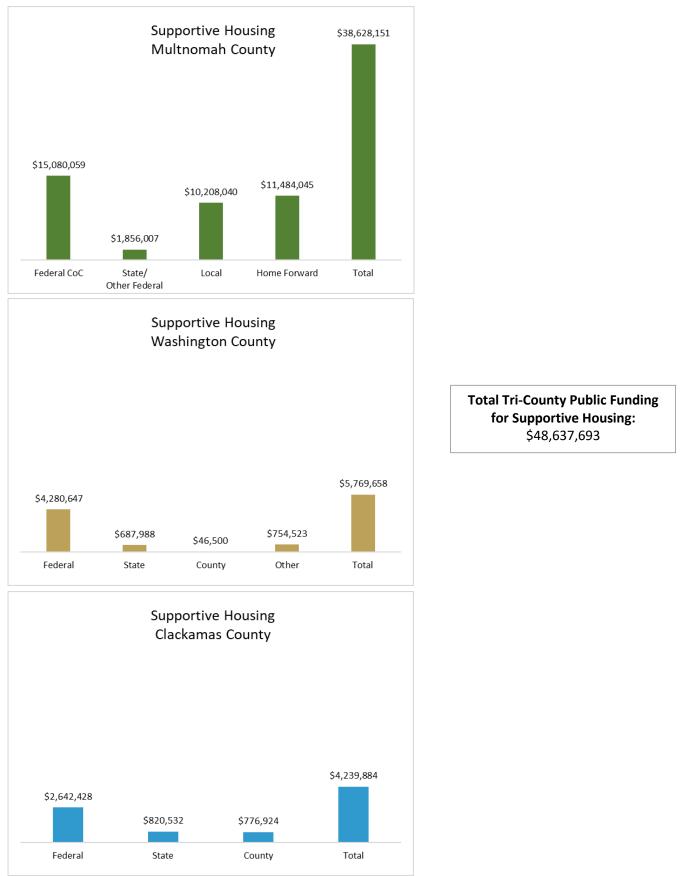
Local:

- County: Multnomah, Washington and Clackamas County General Funds, Washington County Safety Levy
- *City:* City of Portland General Fund

The charts on pages 5-8 show the amounts of federal, state and local funding by county for each program area.

¹ Multnomah County combines rapid rehousing and homelessness prevention services into the same budget category. For consistency, funding information for these two program areas has been combined into one category for all three counties. Washington County's rapid rehousing funding is \$1,151,926 and prevention funding is \$811,615. Clackamas County's rapid rehousing funding is \$1,656,715 and prevention funding is \$552,312.

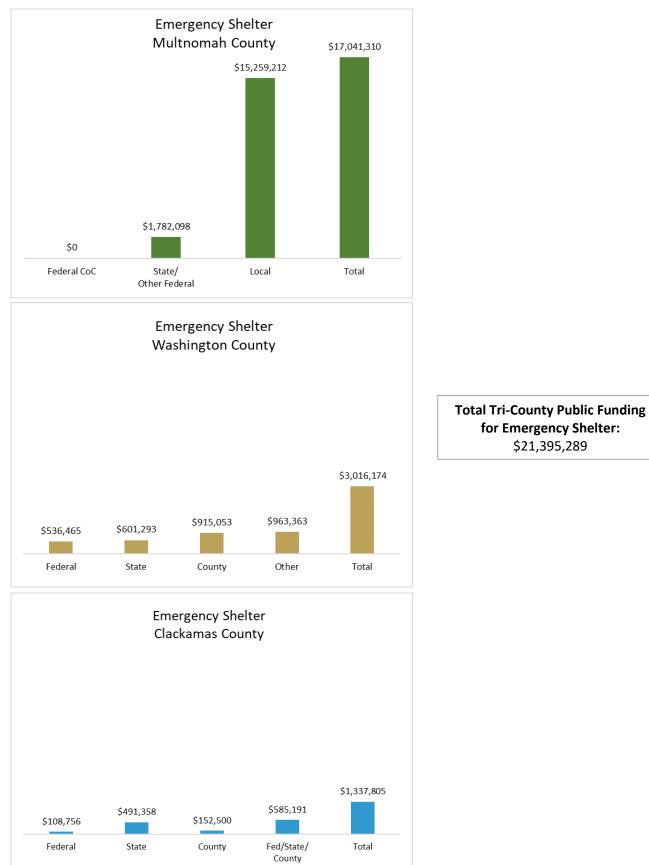
Supportive Housing



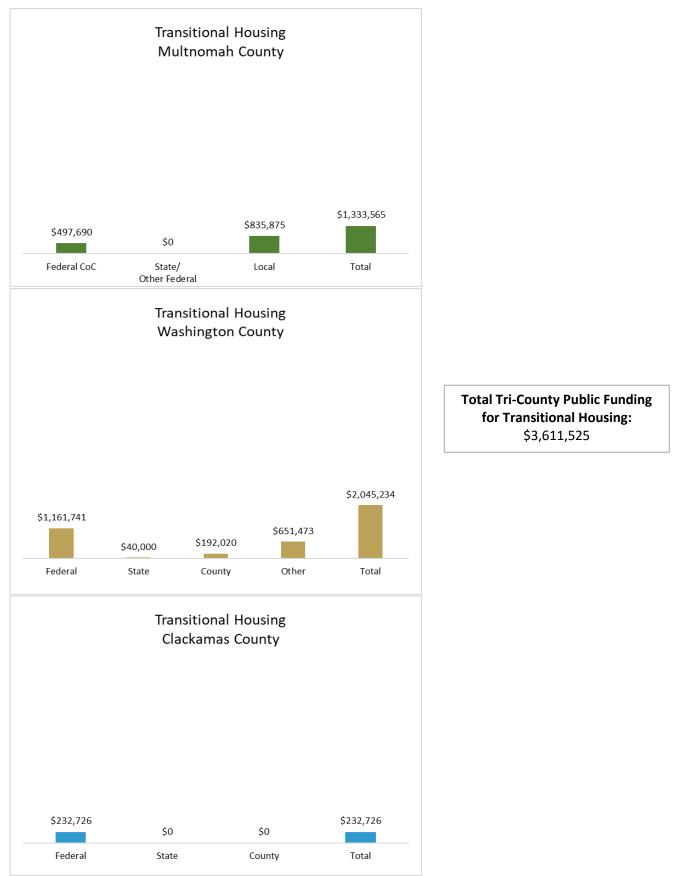
Rapid Rehousing and Prevention



Emergency Shelter



Transitional Housing



System Capacity

The regional scan of homeless service system capacity focuses on supportive housing, rapid rehousing, homelessness prevention, emergency shelter and transitional housing programs. The first part of this section summarizes bed capacity for each program area based on point-in-time data. The second summarizes the number of households served annually within each program area.

Bed Capacity (Point-in-Time Data)

The Housing Inventory Count (HIC) provides a comprehensive snapshot of each county's bed capacity on a single night. It includes publicly funded programs as well as those that don't receive any public funding and don't participate in the county's Homeless Management Information System (HMIS). The data in this section are based on each county's 2020 HIC, which was conducted on January 23, 2020.

The HIC is a useful way to understand system capacity at a single point in time, but it also has limitations that need to be kept in mind:

- The HIC shows how many people the system can serve on a given night, but not how many people are served over the course of a year. (The section on households served provides that information.)
- The HIC doesn't include everyone being served via rapid rehousing on a given night due to the way the data are collected, and it doesn't include homelessness prevention programs at all.
- The HIC doesn't systematically capture seasonal and severe weather emergency shelter beds. Those beds are included in the *Total Bed Capacity* chart below, but they are not guaranteed from year to year.

Total Bed Capacity (P	oint-in-Time 2020)	Multnomah	Washington	Clackamas	Total
Supportive Housing	Total beds	4947	509	401	5857
Rapid Rehousing	Total beds	2186	231	159	2576
Emergency Shelter	Year-round beds	1607	125	99	1831
	Seasonal & severe weather	284	109	209	602
Transitional Housing	Total beds	746	126	35	907

The HIC provides information on how bed capacity is allocated by certain HUD-defined sub-populations and household types on the night of the count. The allocations may shift over time, particularly for programs that are not facility based. The sub-population categories that are tracked in the HIC do not capture the full range of populations served or all of the populations that are prioritized for services by specific programs, so the insights they offer are limited. The sub-populations are not mutually exclusive, and households can be counted in more than one category.

Bed Capacity by Population and Household Type (Point-in-Time 2020)	Multnomah	Washington	Clackamas	Total
Supportive Housing Beds				
Total beds for households with children	1734	166	180	2080
Total beds for households without children	3213	343	221	3777
Beds for veteran households with children	124	117	69	310
Beds for veteran households without children	680	140	128	948
Domestic violence program beds	74	0	7	81
Unaccompanied youth beds	67	0	0	67

Bed Capacity by Population and Household Type (Point-in-Time 2020)	Multnomah	Washington	Clackamas	Total
Rapid Rehousing Beds				
Total beds for households with children	1717	211	126	2054
Total beds for households without children	461	20	33	514
Beds for veteran households with children	11	12	14	37
Beds for veteran households without children	86	7	23	116
Domestic violence program beds	265	18	21	304
Unaccompanied youth beds	181	0	3	184
Emergency Shelter Beds				
Total beds for households with children	379	117	77	573
Total beds for households without children	1297	6	22	1325
Beds for veteran households with children	0	0	0	0
Beds for veteran households without children	110	0	15	125
Domestic violence program beds	111	24	54	189
Unaccompanied youth beds	68	3	0	71
Transitional Housing Beds				
Total beds for households with children	44	39	27	110
Total beds for households without children	698	87	8	793
Beds for veteran households with children	0	27	0	27
Beds for veteran households without children	112	66	0	178
Domestic violence program beds	0	8	0	8
Unaccompanied youth beds	80	10	22	112

Households Served (Annual Data)

Data on the number of households served in each program area over the course of a year provide another lens for understanding system capacity. Compared with point-in-time data, annual data provide a more complete picture of how many people the system can serve. The data on households served also include homelessness prevention programs, which are an important part of the regional system that aren't captured in the HIC. One limitation of the data on households served is that programs that don't participate in HMIS (or don't consistently enter their program data into HMIS) may not be reflected in these data.

The data in the *Total Households Served* chart below are based on the most recently available annual data from 2019 and 2020. (The specific data years within 2019-20 vary from county to county.)

Total Households Served (Annual 2019-20)	Multnomah	Washington	Clackamas	Total
Supportive Housing	3540	393	346	4279
Rapid Rehousing	4000	135	152	4287
Prevention	3430	335	145	3910
Emergency Shelter (year-round beds)	5490	233	n/a²	n/a
Transitional Housing	1290	206	17	1513

² Recent data on the number of households served in year-round emergency shelter for Clackamas County aren't available because one of the county's year-round shelters was demolished and rebuilt, and a full year of data aren't yet available.

The *Households Served by Population and Household Type* chart below provides data on households and people served, broken out by certain HUD-defined sub-populations and household types. These data are from each county's Continuum of Care Annual Performance Reports (APRs) for FY 2018-19, so they are less current than the data in the *Total Households Served* chart above. APRs for FY 2019-20 are not yet available.

As with the HIC, the population categories collected and reported on in the APRs are limited and don't capture the full range of populations that are served by the region's homeless services system. The categories also aren't mutually exclusive, and individuals and households can be counted in more than one category.

Households Served by Population and Household Type (Annual FY 2018-19)	Multnomah	Washington	Clackamas	Total
Supportive Housing				
Total households served	3392	385	261	4038
Households with children and adults	517	42	53	612
Households without children	2874	343	208	3425
Households with only children ³	1	0	0	1
Total persons served	4828	543	391	5762
Veterans	888	138	113	1139
Chronically homeless persons	1792	175	180	2147
Persons fleeing domestic violence	90	16	23	129
Youth under age 25	80	1	3	84
Rapid Rehousing				
Total households served	3507	115	159	3781
Households with children and adults	1151	89	129	1369
Households without children	2319	26	30	2375
Households with only children	8	0	0	8
Total persons served	6563	355	476	7394
Veterans	602	32	36	670
Chronically homeless persons	1285	14	70	1369
Persons fleeing domestic violence	359	25	47	431
Youth under age 25	393	11	10	414
Homelessness Prevention				
Total households served	2869	242	141	3252
Households with children and adults	1198	167	48	1413
Households without children	1629	75	92	1796
Households with only children	2	0	1	3
Total persons served	6501	741 ⁴	255	6756
Veterans	486	33	45	564
Chronically homeless persons	445	5	4	454
Persons fleeing domestic violence	127	34	4	165
Youth under age 25	264	15	21	300

³ "Households with only children" refers to households comprised only of persons under age 18, including unaccompanied minors, adolescent parents and their children, and adolescent siblings.

⁴ Additional households were served through the Emergency Food and Shelter Program.

Households Served by Population and Household	Multnomah	Washington	Clackamas	Total
Type (Annual FY 2018-19) Emergency Shelter				
Total households served	4480	231	660	5371
Households with children and adults	168	140	11	319
Households without children	4156	34	649	4839
Households with only children	92	57	0	149
Total persons served	5136	573	688	6397
Veterans	473	2	76	551
Chronically homeless persons	1501	26	146	1673
Persons fleeing domestic violence	642	54	16	712
Youth under age 25	695	93	47	835
Transitional Housing				
Total households served	1242	185	17	1444
Households with children and adults	29	32	13	74
Households without children	1207	153	1	1361
Households with only children	4	0	3	7
Total persons served	1291	278	44	1613
Veterans	350	114	0	464
Chronically homeless persons	360	14	0	374
Persons fleeing domestic violence	62	17	1	80
Youth under age 25	144	18	22	184

Outcome Metrics

The counties were asked to share the outcome metrics that they currently report on for each program area. This information was supplemented with data from the counties' Continuum of Care applications and Annual Performance Reports (APRs). This section summarizes the primary outcome metrics that are currently collected for each program area. It is intended to provide baseline information as a starting point for the development of regional outcome metrics.

Each county prioritizes specific outcome metrics for each program area (and in some cases for individual projects within a program area). There is some overlap, but there are also some outcome metrics that are only gathered by one county. The outcome metrics that are gathered consistently across all three counties are those that are required by HUD as part of the Continuum of Care reporting. This section begins with some of these shared outcome metrics and then lists additional outcome metrics that are used by individual counties (or specific projects within a county) but are not collected consistently across all three counties.

Many of the outcome metrics in this section could be disaggregated by race and other demographic data as part of regional SHS outcome reporting. Additional outcome metrics could be developed for SHS reporting that draw upon HUD-required universal data elements (UDE) that are currently collected in HMIS by all three counties. There are also opportunities to develop new outcome metrics that expand upon the HUD-required data fields.

Cross-County Outcome Metrics

These are the primary HUD-required outcome metrics that are collected consistently across all three counties. The performance data are based on FY 2018-19 APRs and FY 2019 Continuum of Care applications.

Outcome Metrics	Multnomah	Washington	Clackamas
Supportive Housing (PSH)			
% of persons served who remained in PSH or exited to	94%	95%	94%
permanent housing			
% of adults who gained or increased total income from	46%	60%	62%
entry to annual assessment or exit			
% of adults who gained or increased employment	11%	9%	13%
income from entry to annual assessment or exit			
% of adults who gained or increased non-employment	37%	55%	53%
cash income from entry to annual assessment or exit			
Rapid Rehousing (RRH)			
% of persons exiting RRH to permanent housing	91%	82%	83%
% of persons served in RRH who moved into housing	85%	75%	81%
Average length of time between RRH start date and	36	40	43
housing move-in date, in days			
% of adults who gained or increased total income from	11%	43%	32%
entry to annual assessment or exit			
% of adults who gained or increased employment	7%	28%	19%
income from entry to annual assessment or exit			
% of adults who gained or increased non-employment	5%	23%	15%
cash income from entry to annual assessment or exit			

% of persons s housing or exi % of adults wh entry to exit	Prevention (HP) erved in HP who remained in permanent	0.151		
housing or exi % of adults wh entry to exit	•	0.401		
% of adults wh entry to exit	to d to power on out housing	94%	99%	84%
entry to exit	ted to permanent housing			
	no gained or increased total income from	8%	3%	9%
% of adults wh	no gained or increased employment	6%	3%	6%
income from e	entry to exit			
	no gained or increased non-employment	3%	1%	4%
	rom entry to exit			
Emergency Sh	elter (ES)			
% of persons s	erved in ES who exited to permanent	21%	46%	3%
	footnote 5 for limitations of this measure)			
% of adults wh	no gained or increased total income from	7%	15%	7%
entry to exit				
	no gained or increased employment	4%	8%	3%
income from e	•			
	no gained or increased non-employment	3%	9%	3%
	rom entry to exit			
Transitional H	•••			
-	erved in TH who exited to permanent	60%	77%	100%
housing				
	o gained or increased total income from	37%	28%	63%
	al assessment or exit			
	no gained or increased employment	26%	17%	63%
	entry to annual assessment or exit			
	no gained or increased non-employment	12%	14%	0%
	rom entry to annual assessment or exit			
Returns to Ho				
•	who exited the homeless services system			
•	nt housing (PH) destination and returned			
	ss services system in:	00/	00/	00/
	Exit was from PH (includes PSH and RRH)	9%	0%	0%
	Exit was from ES	22%	5%	5%
	Exit was from TH	9%	1%	0%
6-12	Exit was from PH (includes PSH and RRH)	8%	3%	3%
months	Exit was from ES	11%	7%	0%
	Exit was from TH	7%	0%	0%
2 years	Exit was from PH (includes PSH and RRH)	28%	5%	3%
_	Exit was from ES	45%	15%	8%
	Exit was from TH	26%	2%	0%

⁵ There are several limitations to this measure: (a) Multnomah and Clackamas have high rates of missing data on exit destinations (55% and 95%), which is a common issue for shelters that exit clients in HMIS after they do not return for a period of time; (b) some of the data, particularly for Clackamas, include warming centers that are not intended to help participants transition to permanent housing. For families with children in Clackamas (a data set that better reflects exits from year-round shelters with services), 60% exit to permanent housing (with a missing data rate of only 12%).

Additional Outcome Metrics

This section lists the metrics in addition to those in the above chart that are used by at least one county (or in some cases by specific projects within a county) to measure outcomes.

Supportive Housing
People/households newly placed or retained
Bed utilization
Housing stabilization period
Length of time people remain homeless
Equitable access and participation in program by BIPOC participants
Resource connections
Engagement in trackable onsite or offsite services
Connections to health insurance, primary care and mental health services
6-month and 12-month housing retention
Rapid Rehousing
People/households newly placed or retained
Bed utilization
Length of time people remain homeless
Equitable access and participation in program by BIPOC participants
6-month and 12-month housing retention
Prevention
People/households newly placed or retained
Prevent homelessness for extremely low and low-income households
Equitable access and participation in program by BIPOC participants
6-month and 12-month housing retention
Emergency Shelter
People/households served
Bed utilization
Length of time people remain homeless
Equitable access and participation in program by BIPOC participants
Transitional Housing
People/households newly placed or retained
Bed utilization
Participants enrolled in education program
Length of time people remain homeless
Equitable access and participation in program by BIPOC participants
System-Level Metrics
Inflow and outflow reporting

Cost Analysis

The data scan gathered information on current program costs to provide a starting point for Metro and its jurisdictional partners to work together to develop a methodology for determining SHS cost projections. The intent of the cost analysis was to better understand the range of costs for different program models as well as the factors that influence whether a specific project is at the low end or high end of the range. The analysis also aimed to assess what we can learn from the available data, and the gaps and limitations of that data, in order to provide a baseline to help inform further research and planning.

Recognizing that public funding covers only a portion of the total costs of most projects, the counties worked to gather more complete budget data for their programs. This was a significant undertaking with a short turnaround time, and the comprehensiveness of the budget data that could be collected varied by project and program area. As a result, the analysis of average costs reflects some but not all of the additional costs to programs beyond the public share. The analysis also doesn't capture providers' full administrative costs or any of the administrative costs to the jurisdictions, but those costs will need to be incorporated into SHS budget projections.

Even if the budget information for the analysis was complete, there are some inherent limitations to using current cost data to inform SHS program costs. Some existing projects are under-funded, so their budgets don't necessarily capture what it would actually cost to implement sustainable programs that reflect best practices. In addition, many projects rely on a wide array of leveraged services, some of which are not reflected in their budgets and are impossible to fully quantify. As the region scales up its programming, these leveraged services may not be able to meet the increased demand unless they are also funded.

The cost analysis has additional methodological limitations that should be kept in mind:

- Varying levels of completeness in the budget data across projects contribute to some of the variations in each county's average costs.
- Since the analysis relied on relatively small sample sizes, in some cases the average costs were distorted by
 a single program with disproportionately high costs related to unique features of its program model or
 disproportionately low costs due to incomplete budget information. When the outliers significantly
 skewed the averages, they were excluded from the calculations.
- Due to data inconsistencies and limitations in a few of the data sets, the analysis of average costs sometimes required the use of estimates and extrapolations.
- In a few cases, insufficient data made it impossible to develop a reasonable estimate. These are noted in the chart below with "n/a" and explanatory footnotes.

Cost Category	Multnomah	Washington	Clackamas
Supportive Housing			
Rent: average annual cost per unit	\$10,808	\$13,172	\$15,008
Supportive services: average annual cost per unit	\$4,775	\$10,714	\$6,914
Average total annual cost per unit (rent+services+admin)	\$17,076	\$24,886	\$23,048
Rapid Rehousing			
Rent: average annual cost per household served	\$6,207	\$4,103	\$5,232
Supportive services: average annual cost per household served	\$4,500	\$3,477	\$4,846
Average total annual cost per household (rent+services+admin)	\$12,303	\$8,029	\$11,366

Average Costs

Cost Category	Multnomah	Washington	Clackamas
Homelessness Prevention			
Average annual cost per household served	\$1,993 ⁶	\$2,373 ⁷	\$3,009
Emergency Shelter ⁸			
Average annual cost per household served	\$3,104 ⁹	\$13,808	n/a ¹⁰
Average annual cost per bed	\$12,274	\$17,818	\$4,756 ¹¹
Transitional Housing			
Average annual cost per household served	n/a ¹²	\$11,537	\$13,690
Average annual cost per unit	n/a	\$20,928	\$19,394

Factors Influencing Costs

Within each program area, there is typically a range of costs, with some projects costing less than the average and some costing significantly more. This section summarizes the most common program-related factors that influence whether costs are at the low end or high end of the range for each program area.

It should be noted that while the factors listed in this section are important to consider when planning for future program costs, some projects were on the low end of the cost range for this analysis because the available cost data did not include the project's full costs.

Supportive Housing

- Household type and size
- Acuity of need of population served
- Service model e.g. Intensive Case Management and Assertive Community Treatment are more expensive than support services that primarily focus on connecting tenants to other resources
- Availability of clinical services these services are often not reflected in the project's budget data if they are provided by partners or funded through Medicaid billing, but they affect the overall costs
- Availability of flexible funding to cover direct costs for specific services tailored to each household
- Staff to client ratios underfunded programs often have ratios that are higher than best practice guidelines, which can limit the effectiveness of the supportive services
- Operating model e.g. upfront costs for developed units are higher than for leased units, but ongoing costs are lower; services are more expensive to provide at scattered sites than a single site

Rapid Rehousing

Household type and size

⁶ This figure is a rough extrapolated estimate due to limited data.

⁷ This estimate excludes one outlier program with an average cost per of \$41,352 per household; if that outlier is included in the estimate, the average cost is \$8,870.

⁸ A goal for this analysis was to determine an average cost for housing placements out of shelter, but that wasn't possible for several reasons: (a) funding to support housing placement out of shelter is often budgeted as rapid rehousing and isn't part of the shelter budget; (b) there is a high percentage of missing data on housing placements out of shelter, as noted earlier in this report; (c) not all shelters are designed or funded to support housing placement.

⁹ Due to limited data, this figure is only based on public costs for emergency shelter.

¹⁰ Insufficient data were available to calculate average costs per household for emergency shelter for Clackamas County.

¹¹ Due to limited data, this is a rough extrapolated estimate that reflects the average operating costs of church-run shelters combined with the average public cost for case management.

¹² Insufficient data were available to calculate average costs for transitional housing for Multnomah County.

- Acuity of need of households served
- Length and intensity of housing retention support and wrap-around services provided
- Staff to client ratios
- Average length of service

Prevention

- Household type and size
- Level and duration of rent assistance provided
- · Level of other financial assistance provided
- · Availability and level of case management or other support services
- Average length of service

Emergency Shelter

- Household type and size
- Acuity of need of population served
- Operating model e.g. shelters on church property run by volunteers are less costly (but also more limited) than facility-based shelters
- Availability and level of case management or housing placement support
- Type of programming e.g. domestic violence and youth shelters often have higher costs than those without such specialized services

Transitional Housing

- Household type and size
- Acuity of need of population served
- Operating model e.g. facility-based vs. scattered site transition-in-place
- Type and level of case management and programming provided
- Average length of service

Comparisons to Other Available Cost Data

Supportive Housing

Corporation for Supportive Housing (CSH) Estimates

Nationally, CSH calculates average costs for tenancy support services at \$7,200 per household per year, with costs ranging as high as \$17,000 for Assertive Community Treatment services. For the 2019 tri-county CSH report,¹³ CSH worked with local stakeholders to develop an estimated annual service cost of \$10,000 per household based on a survey of actual costs from a sample of local providers. The estimate is based on a ratio of one case manager to 10 clients for scattered site and one case manager to 15 clients for single site. It also includes flexible service funding for direct costs not covered by community-based and Medicaid-paid services.

Average annual cost	s per household	Individuals	Families
Supportive Services		\$10,000	\$10,000
Rent Assistance	Private market unit	\$13,000	\$19,600
	Regulated affordable housing unit	\$7,000	\$7,000

¹³ "Tri-County Equitable Housing Strategy to Expand Supportive Housing for People Experiencing Chronic Homelessness." Corporation for Supportive Housing. 2019.

CSH's cost estimate for rent assistance for private market units is based on HUD's 2018 fair market rents (FMR) and does not include the gap between FMRs and actual rental costs in the market. The estimate for regulated affordable housing units is based on costs from a sample of local projects.

Portland State University (PSU) Estimates

PSU's Homelessness Research and Action Collaborative's 2019 report¹⁴ provides cost estimates that are similar to CSH's but are based on cost ranges rather than a single figure for each cost category:

Average annual costs	per household	Individuals	Families	
Supportive Services		\$8,800-\$10,000	\$8,800-\$10,000	
Rent Assistance	Private market unit	\$11,352-\$18,960	\$14,904-\$41,000	
	Regulated affordable housing unit	\$6,000-\$8,000	\$6,000-\$8,000	

The low end of PSU's service cost estimates is based on an analysis of Multnomah County's spending dashboard; the high end is based on CSH's estimate. PSU's rent assistance cost estimate for private market units is based on HUD's 2017 FMR and hypothetical small area FMR zip code max as well as Portland's 2017 State of Housing report. The regulated affordable housing unit estimate is based on CSH's estimate and Multifamily NW's 2019 Apartment Report.

Rapid Rehousing

HUD's Family Options Study,¹⁵ which is one of the most rigorous national studies of housing interventions for homeless families, found the average monthly cost per household of rapid rehousing was \$880, which translates into an annual cost of \$10,560. (Actual annual costs per household would be lower since not all households served in a given year receive 12 months of services.) Housing costs constituted 72% of the total average costs while supportive services constituted 28%.

Prevention

A HUD study of the Homelessness Prevention and Rapid Rehousing Program¹⁶ found an average cost of \$897 per person and \$2,252 per household for homelessness prevention assistance. Financial assistance (including rent assistance, utility payments and moving costs) constituted 73% of average costs while supportive services constituted 27%.

Emergency Shelter

HUD's Family Options Study found an average monthly per household cost of \$4,819 for emergency shelter, which translates into an annual cost of \$57,828. Actual annual costs per household served would be lower since few households remain in emergency shelter for 12 months, but the annual cost estimate provides a proxy for the annual operating costs of shelter space for one family. Supportive services made up 63% of the average costs, and shelter costs made up 37%.

Transitional Housing

HUD's Family Options Study found an average monthly per household cost of \$2,706 for transitional housing, which translates into an annual cost of \$32,472. The annual cost estimate provides a proxy for the annual operating costs of one unit of transitional housing for families. Supportive services constituted 42% of program costs, on average, and housing costs constituted 58%.

¹⁴ "Governance, Costs, and Revenue Raising to Address and Prevent Homelessness in the Portland Tri-County Region." Portland State University. 2019.

¹⁵ "Family Options Study: 3-Year Impacts of Housing and Services Interventions for Homeless Families." HUD. 2016.

¹⁶ "Homelessness Prevention and Rapid Re-Housing Program (HPRP): Year 3 & Final Program Summary." HUD. 2016.

Potential Next Steps

This initial cost analysis offers a starting point for SHS cost planning that will need to be supplemented with additional research. Possible next steps could include:

- Asking a sample of service providers representing a range of models in each program area to provide full budget data for their programs to support a more complete analysis of costs.
- Working with service providers to identify what it would actually cost to implement their programs with fidelity to best practices.¹⁷
- Determining the proportion of housing units within each relevant program area that will be developed vs. leased in order to more accurately estimate housing costs.
- Applying an annual inflation factor to all costs to more accurately project SHS costs over time.¹⁸

 ¹⁷ For example, CSH's Services Staffing and Budget Tool enables supportive housing providers to combine actual program data with best practice guidelines to develop cost estimates: https://cshcloud.egnyte.com/fl/KibC8XSZTs#folder-link/.
 ¹⁸ The CSH tri-county report suggests using inflation factors of 1.5% for operating costs, 1.5% for rental assistance, and 2% for services.

EXHIBIT E: Chart of Metro Owned Sites

						Metro	Transit		
SiteID	SITENAME	ACREAGE	ТҮРЕ	Building	InsideUGB	Manages	Distance	General Zoning	Preliminary Staff Assessment
									Additional site analysis needed (unused space,
1	Orchard Park	28.86	Park and/or Natural Area	Yes	Yes	No	0.15	Industrial	zoning, permitting)
									Additional site analysis needed (unused space,
2	Ambleside	29.31	Park and/or Natural Area	Yes	Yes	Yes	0.78	Single Family	zoning, permitting)
									Additional site analysis needed (unused space,
3	Ash Creek Natural Area	7.84	Park and/or Natural Area	No	Yes	No	0.07	Parks and Open Spaces	zoning, permitting)
									If SHS funds used, may not possible if not in
4	Baker Creek Canyon	144.04	Park and/or Natural Area	No	No	Yes	2.94	Rural	service district
									If SHS funds used, may not possible if not in
5	Baker Heaton Confluence	83.48	Park and/or Natural Area	Yes	No	Yes	3.80	Rural	service district
									If SHS funds used, may not possible if not in
6	North Logan Natural Area	175.40	Park and/or Natural Area	Yes	No	Yes	0.14	Rural	service district
									If SHS funds used, may not possible if not in
7	Balch Creek Forest	87.05	Park and/or Natural Area	No	No	Yes	0.25	Rural	service district
									Additional site analysis needed (unused space,
8	Baltimore Woods Natural Area	9.37	Park and/or Natural Area	No	Yes	No	0.17	Commercial	zoning, permitting)
									If SHS funds used, may not possible if not in
9	Barton Natural Area	97.59	Park and/or Natural Area	Yes	No	Yes	0.12	Rural	service district
									Additional site analysis needed (unused space,
10	Beaver Creek Woods	1.82	Park and/or Natural Area	Yes	Yes	Yes	0.01	Single Family	zoning, permitting)
									Additional site analysis needed (unused space,
11	Beggars-tick Wildlife Refuge	26.38	Park and/or Natural Area	No	Yes	No	0.07	Parks and Open Spaces	zoning, permitting)
									If SHS funds used, may not possible if not in
12	Bell View Point	10.26	Park and/or Natural Area	No	No	Yes	1.26	Rural	service district
									Additional site analysis needed (unused space,
13	Blue Lake Regional Park	181.61	Park and/or Natural Area	Yes	Yes	Yes	0.60	Parks and Open Spaces	zoning, permitting)
									Additional site analysis needed (unused space,
14	Bonita Natural Area	2.62	Park and/or Natural Area	No	Yes	Yes	0.20	Industrial	zoning, permitting)
									Additional site analysis needed (unused space,
15	Brown Natural Area	37.79	Park and/or Natural Area	No	Yes	No	0.13	Parks and Open Spaces	zoning, permitting)
									Additional site analysis needed (unused space,
16	Brown's Ferry Park	32.15	Park and/or Natural Area	Yes	Yes	No	0.19	Multi Family	zoning, permitting)
									If SHS funds used, may not possible if not in
17	Buck and Gordon Creeks	538.61	Park and/or Natural Area	Yes	No	Yes	4.60	Rural	service district
									If SHS funds used, may not possible if not in
18	Burlington Creek Forest	386.02	Park and/or Natural Area	Yes	No	Yes	0.47	Rural	service district
									Additional site analysis needed (unused space,
19	Buttes Natural Area	135.44	Park and/or Natural Area	Yes	Yes	No	0.34	Parks and Open Spaces	zoning, permitting)
									If SHS funds used, may not possible if not in
20	Camas Cliffs	97.19	Park and/or Natural Area	Yes	No	Yes	2.07	Rural	service district

				1					Additional site analysis needed (unused space,
21	Wahoo Creek Natural Area	37 47	Park and/or Natural Area	Yes	Yes	No	0.26	Parks and Open Spaces	zoning, permitting)
		57.17			105		0.20		If SHS funds used, may not possible if not in
22	Canemah Bluff	328 86	Park and/or Natural Area	Yes	No	Yes	0.40	Rural	service district
		520.00		100		103	0.10		If SHS funds used, may not possible if not in
23	Cazadero Natural Area	24.31	Park and/or Natural Area	No	No	Yes	0.05	Rural	service district
		2.002					0.00		If SHS funds used, may not possible if not in
24	Chehalem Ridge Natural Area	1279.36	Park and/or Natural Area	Yes	No	Yes	3.56	Rural	service district
					-				Additional site analysis needed (unused space,
25	Chinook Landing Marine Park	47.13	Park and/or Natural Area	Yes	Yes	Yes	1.05	Parks and Open Spaces	zoning, permitting)
	5	_							If SHS funds used, may not possible if not in
26	Chinguapin Bluffs	435.99	Park and/or Natural Area	No	No	Yes	5.32	Rural	service district
	• •								If SHS funds used, may not possible if not in
27	Clackamas Bluff	186.76	Park and/or Natural Area	No	No	Yes	0.14	Rural	service district
									If SHS funds used, may not possible if not in
28	Clear Creek Canyon	539.30	Park and/or Natural Area	Yes	No	Yes	1.34	Rural	service district
	-								
									Wetlands likely not possible, but site is large and
									may have usable places. Additional site analysis
29	Coffee Lake Creek Wetlands	265.42	Park and/or Natural Area	Yes	Yes	Yes	0.22	Rural	needed (unused space, zoning, permitting)
									Additional site analysis needed (unused space,
30	Columbia River Shoreline B	8.19	Park and/or Natural Area	No	Yes	Yes	0.16	Parks and Open Spaces	zoning, permitting)
									Additional site analysis needed (unused space,
31	Columbia Shoreline	41.05	Park and/or Natural Area	No	Yes	Yes	0.67	Parks and Open Spaces	zoning, permitting)
									Additional site analysis needed (unused space,
32	Cooper Mountain Nature Park	232.51	Park and/or Natural Area	Yes	Yes	No	1.27	Rural	zoning, permitting)
									If SHS funds used, may not possible if not in
33	Corral Creek Natural Area	32.40	Park and/or Natural Area	No	No	Yes	1.67	Rural	service district
									If SHS funds used, may not possible if not in
34	Dabney State Recreation Area	120.73	Park and/or Natural Area	Yes	No	No	1.11	Rural	service district
	- · · · · · ·								If SHS funds used, may not possible if not in
35	Dairy McKay Confluence	99.14	Park and/or Natural Area	Yes	No	Yes	0.19	Rural	service district
									If SHS funds used, may not possible if not in
36	North Fork Deep Creek NA North	39.81	Park and/or Natural Area	Yes	No	Yes	1.90	Rural	service district
									Additional site analysis needed (unused space,
37	Patterson Street	32.09	Park and/or Natural Area	Yes	Yes	No	0.23	Single Family	zoning, permitting)
									Additional site analysis needed (unused space,
38	East Bliss Butte	111.82	Park and/or Natural Area	Yes	Yes	Yes	1.24	Rural	zoning, permitting)
									Additional site analysis needed (unused space,
39	East Council Creek	38.49	Park and/or Natural Area	Yes	Yes	Yes	0.30	Rural	zoning, permitting)
									If SHS funds used, may not possible if not in
40	Ennis Creek Forest	352.16	Park and/or Natural Area	Yes	No	Yes	0.06	Rural	service district
									Wetlands likely not possible, but site is zoned
									mixed use residential. Additional site analysis
41	Grant Butte Wetlands	49.44	Park and/or Natural Area	Yes	Yes	Yes	0.02	Mixed Use Residential	needed (unused space, zoning, permitting)

						1		1	Additional site analysis needed (unused space,
12	Fanno Creek Greenway	26.01	Park and/or Natural Area	Yes	Yes	No	0.02	Single Family	zoning, permitting)
42	anno creek Greenway	50.01		165	165		0.02		Additional site analysis needed (unused space,
13	Fanno Creek Natural Area	8 8 7	Park and/or Natural Area	No	Yes	No	0.02	Parks and Open Spaces	zoning, permitting)
43		0.02			163		0.02		If SHS funds used, may not possible if not in
44	Farmington Paddle Launch	5 75	Park and/or Natural Area	Yes	No	Yes	2 /0	Rural	service district
44 1		5.75		165	NO	165	5.49	Kulai	If SHS funds used, may not possible if not in
45	Fern Hill Forest	262.00	Park and/or Natural Area	Yes	No	Yes	2 /0	Rural	service district
45		202.08		165	NO	165	2.40	Kulai	If SHS funds used, may not possible if not in
16	Gary Island	40.41	Park and/or Natural Area	No	No	Yes	1 0 7	Rural	service district
40	Sary Island	49.41			NO	165	1.02	Nuldi	Additional site analysis needed (unused space,
17	Forest Park	1016 16	Park and/or Natural Area	Yes	Yes	No	0.00	Parks and Open Spaces	zoning, permitting)
4/		4840.40		165	165	NO	0.00	Faiks and Open spaces	Additional site analysis needed (unused space,
10	Gabbert Butte Natural Area	60 77	Park and/or Natural Area	No	Yes	Yes	0 4 2	Single Family	zoning, permitting)
40	Sabbelt Butte Natural Alea	00.77			165	165	0.43		If SHS funds used, may not possible if not in
10	Gales Forest Grove	47 44	Park and/or Natural Area	Yes	No	Yes	0.26	Rural	service district
49	Sales Forest Grove	47.44		res	NO	Tes	0.50	Kulai	Additional site analysis needed (unused space,
FO	Gilbert Ridge Natural Area	10.22	Park and/or Natural Area	No	Yes	No	0 47	Parks and Open Spaces	zoning, permitting)
50	Silbert Ridge Natural Area	10.52		INO	res	NO	0.47	Parks and Open spaces	If SHS funds used, may not possible if not in
E1	Quamash Prairie	172 54	Park and/or Natural Area	Yes	No	Yes	1 62	Rural	service district
51		172.54		res	NO	165	4.05	nuldi	If SHS funds used, may not possible if not in
ED	Grabel Floodplain	1E 10	Park and/or Natural Area	Yes	No	Yes	1 06	Rural	service district
52		15.16		res	NO	Tes	1.00	Nuldi	If SHS funds used, may not possible if not in
F 2	Graham Oaks Nature Park	245.02	Dark and for Notural Area	Vac	No	Vac	0.04	Rural	service district
53	Granam Oaks Nature Park	245.82	Park and/or Natural Area	Yes	No	Yes	0.94	Rurai	Additional site analysis needed (unused space,
F A	Gresham Butte Natural Area	222.05	Dark and for Notural Area	Vac	Vac	Vac	0.04	Cingle Femily	
54	Siesham Butte Natural Area	222.05	Park and/or Natural Area	Yes	Yes	Yes	0.04	Single Family	zoning, permitting) If SHS funds used, may not possible if not in
	Holcomb Creek	22.22	Park and/or Natural Area	No	No	Yes	0.26	Rural	service district
55		52.55		INO	NO	165	0.50	Nuldi	If SHS funds used, may not possible if not in
EG	Howell Territorial Park	120 79	Park and/or Natural Area	Yes	No	Yes	0.75	Rural	service district
50		120.78		res	NO	Tes	0.75	nuldi	If SHS funds used, may not possible if not in
F7	ndian John Island	C1 FC	Dark and for Notural Area	No	No	Yes	4 01	Rural	service district
57		01.50	Park and/or Natural Area	INO	NO	Tes	4.01	Kulai	Additional site analysis needed (unused space,
EO	lenne Butte	121 40	Park and/or Natural Area	No	Yes	Yes	0.00	Single Family	zoning, permitting)
201		121.40			165	165	0.00		Additional site analysis needed (unused space,
50	Johnson Creek Park	5.00	Park and/or Natural Area	Yes	Yes	No	0 10	Parks and Open Spaces	zoning, permitting)
55.		5.09		165	163	NO	0.10	Faiks and Open Spaces	If SHS funds used, may not possible if not in
60	lonsson Center	74 61	Park and/or Natural Area	Yes	No	Yes	2 16	Rural	service district
00		74.01		Tes	NO	165	2.10	Ruidi	Additional site analysis needed (unused space,
61	Kelly Butte Natural Area	20.06	Park and/or Natural Area	No	Yes	No	0.07	Parks and Open Spaces	zoning, permitting)
01	Neny Butte Natural Alea	50.00	raik allujur Natural Ared		165	NU	0.07	raiks and Open spaces	If SHS funds used, may not possible if not in
62	Killin Wetlands Nature Park	EQ0 24	Park and/or Natural Area	Yes	No	Yes	6 20	Rural	service district
02		569.34	raik allu/or Natural Ared	185	NO	105	0.28	nulai	If SHS funds used, may not possible if not in
62	Vings Bond	45.04	Park and/or Natural Area	No	No	Yes	0 5 3	Rural	service district
05	Kings Bend	45.94	raik allu/or Naturai Ared		NO	185	0.53	nulai	If SHS funds used, may not possible if not in
64	Larch Mountain Corridor	245 52	Dark and for Natural Area	No	No	Voc	0.20	Rural	service district
04		215.52	Park and/or Natural Area	INO	No	Yes	9.30	Ruidi	

lumbia Slough Natural Area wer Powell Butte Floodplain James Gleason Memorial Boat mp aple Lane Natural Area aricara Natural Area aroon Ponds	85.76 7.92 27.60	Park and/or Natural Area Park and/or Natural Area Park and/or Natural Area Park and/or Natural Area	No No Yes No	Yes Yes Yes	No No Yes	0.35	Industrial Parks and Open Spaces	Additional site analysis needed (unused space, zoning, permitting) Probably not on a floodplain, but additional analysis could show usable portions of the site. Additional site analysis needed (unused space,
wer Powell Butte Floodplain James Gleason Memorial Boat mp aple Lane Natural Area aricara Natural Area	85.76 7.92 27.60	Park and/or Natural Area Park and/or Natural Area Park and/or Natural Area	No Yes	Yes	No	0.35	Parks and Open Spaces	Probably not on a floodplain, but additional analysis could show usable portions of the site. Additional site analysis needed (unused space,
James Gleason Memorial Boat mp aple Lane Natural Area aricara Natural Area	7.92 27.60	Park and/or Natural Area Park and/or Natural Area	Yes					analysis could show usable portions of the site. Additional site analysis needed (unused space,
James Gleason Memorial Boat mp aple Lane Natural Area aricara Natural Area	7.92 27.60	Park and/or Natural Area Park and/or Natural Area	Yes					Additional site analysis needed (unused space,
mp aple Lane Natural Area aricara Natural Area	27.60	Park and/or Natural Area		Yes	Yes	0.77		
aple Lane Natural Area aricara Natural Area	27.60	Park and/or Natural Area		res	res	0.77	Industrial	zoning, permitting)
aricara Natural Area			No				Industrial	If SHS funds used, may not possible if not in
aricara Natural Area			NO	No	Yes	0.10	Rural	service district
	17.25			NO	165	0.10	Kulai	Additional site analysis needed (unused space,
	17.25	Park and/or Natural Area	No	Yes	No	0.32	Parks and Open Spaces	zoning, permitting)
aroon Ponds				105	110	0.52		If SHS funds used, may not possible if not in
	47 24	Park and/or Natural Area	No	No	Yes	1 73	Rural	service district
					105	1.75		Additional site analysis needed (unused space,
arshall Park	38.02	Park and/or Natural Area	Yes	Yes	No	0.01	Parks and Open Spaces	zoning, permitting)
	00.02					0.01		If SHS funds used, may not possible if not in
ason Hill Park	1.00	Park and/or Natural Area	Yes	No	Yes	5.39	Rural	service district
				-				If SHS funds used, may not possible if not in
Carthy Creek	402.81	Park and/or Natural Area	No	No	Yes	1.13	Rural	service district
								If SHS funds used, may not possible if not in
ddle Baker Creek	31.16	Park and/or Natural Area	Yes	No	Yes	3.62	Rural	service district
								Additional site analysis needed (unused space,
orrison Woods Natural Area	19.05	Park and/or Natural Area	No	Yes	No	0.60	Single Family	zoning, permitting)
								Additional site analysis needed (unused space,
ount Talbert Nature Park	252.97	Park and/or Natural Area	Yes	Yes	Yes	0.00	Industrial	zoning, permitting)
								If SHS funds used, may not possible if not in
well Creek Canyon	235.59	Park and/or Natural Area	Yes	No	Yes	0.06	Rural	service district
	24.0 70					1.54		If SHS funds used, may not possible if not in
rth Abbey Creek Natural Area	210.79	Park and/or Natural Area	Yes	NO	Yes	1.51	Rural	service district
which December Creatly Creating	15 50		Ne	Vaa	No.	0.17	Cinala Familu	Additional site analysis needed (unused space,
rth Beaver Creek Greenway	15.59	Park and/or Natural Area	NO	res	Yes	0.17	Single Family	zoning, permitting) If SHS funds used, may not possible if not in
rpoptor Crook North	115 25	Park and for Natural Area	No	No	Voc	0.60	Bural	service district
•	115.55				165	0.09	Kulai	
	25.22	Dark and (ar Natural Area	No	No	Vac	0.00	Durol	If SHS funds used, may not possible if not in service district
	55.25		INO	NO	Tes	0.99	Kulai	
	200.00	Deuly and /an National Arr		NIE	No.	2.46	Durrel	If SHS funds used, may not possible if not in
arsn	308.90	Park and/or Natural Area	INO	NO	Yes	3.16	Kural	service district
rth Nowall Crook	66.00	Dark and for Natural Area	No	No	Voc	0.22	Bural	If SHS funds used, may not possible if not in service district
	83.00	raik allu/or Natural Area		NO	res	0.23	nuidi	Most of Zoo is utilized but may be some areas on
								the land/site that could be considered with
egon Zoo	6/ 2/	Park and/or Natural Area	Ves	Ves	Ves	0.00	Parks and Open Spaces	additional analysis.
	04.24			103		0.00		Additional site analysis needed (unused space,
enco Woods Nature Park	32 69	Park and/or Natural Area	Yes	Yes	No	0 37	Mixed Use Residential	zoning, permitting)
	52.05		+			0.57		If SHS funds used, may not possible if not in
ndy River Shore A.B.C	1.85	Park and/or Natural Area	No	No	Yes	0.43	Rural	service district
	Carthy Creek dle Baker Creek rrison Woods Natural Area	Carthy Creek402.81dle Baker Creek31.16rrison Woods Natural Area19.05unt Talbert Nature Park252.97vell Creek Canyon235.59th Abbey Creek Natural Area210.79th Beaver Creek Greenway15.59benter Creek North115.35th Coffee Lake Creek35.23th Multnomah Channel308.90th Newell Creek66.83gon Zoo64.24nco Woods Nature Park32.69	Carthy Creek402.81Park and/or Natural Areadle Baker Creek31.16Park and/or Natural Arearrison Woods Natural Area19.05Park and/or Natural Areaunt Talbert Nature Park252.97Park and/or Natural Areavell Creek Canyon235.59Park and/or Natural Areath Abbey Creek Natural Area210.79Park and/or Natural Areath Beaver Creek Greenway15.59Park and/or Natural Areabenter Creek North115.35Park and/or Natural Areath Coffee Lake Creek35.23Park and/or Natural Areath Multnomah Channel308.90Park and/or Natural Areath Newell Creek66.83Park and/or Natural Areagon Zoo64.24Park and/or Natural Areanco Woods Nature Park32.69Park and/or Natural Area	Carthy Creek402.81Park and/or Natural AreaNodle Baker Creek31.16Park and/or Natural AreaYesrrison Woods Natural Area19.05Park and/or Natural AreaNount Talbert Nature Park252.97Park and/or Natural AreaYesrell Creek Canyon235.59Park and/or Natural AreaYesth Abbey Creek Natural Area210.79Park and/or Natural AreaYesth Abbey Creek Natural Area210.79Park and/or Natural AreaYesth Beaver Creek Greenway15.59Park and/or Natural AreaNoth Coffee Lake Creek115.35Park and/or Natural AreaNoth Multnomah Channel308.90Park and/or Natural AreaNoth Newell Creek66.83Park and/or Natural AreaNoth Newell Creek64.24Park and/or Natural AreaYesmco Woods Nature Park32.69Park and/or Natural AreaYes	Carthy Creek402.81Park and/or Natural AreaNoNodle Baker Creek31.16Park and/or Natural AreaNoNorrison Woods Natural Area19.05Park and/or Natural AreaNoYesunt Talbert Nature Park252.97Park and/or Natural AreaYesYesvell Creek Canyon235.59Park and/or Natural AreaYesNoth Abbey Creek Natural Area210.79Park and/or Natural AreaYesNoth Beaver Creek Greenway15.59Park and/or Natural AreaNoYesth Coffee Lake Creek35.23Park and/or Natural AreaNoNoth Multnomah Channel308.90Park and/or Natural AreaNoNoth Newell Creek66.83Park and/or Natural AreaYesYesgon Zoo64.24Park and/or Natural AreaYesYesno Woods Nature Park32.69Park and/or Natural AreaYesYes	Carthy Creek402.81Park and/or Natural AreaNoNoYesdle Baker Creek31.16Park and/or Natural AreaYesNoYesrrison Woods Natural Area19.05Park and/or Natural AreaNoYesNount Talbert Nature Park252.97Park and/or Natural AreaYesYesYesvell Creek Canyon235.59Park and/or Natural AreaYesNoYesth Abbey Creek Natural Area210.79Park and/or Natural AreaYesNoYesth Beaver Creek Greenway15.59Park and/or Natural AreaNoYesYesbenter Creek North115.35Park and/or Natural AreaNoNoYesth Coffee Lake Creek35.23Park and/or Natural AreaNoNoYesth Multnomah Channel308.90Park and/or Natural AreaNoNoYessh308.90Park and/or Natural AreaNoNoYesgon Zoo64.24Park and/or Natural AreaYesYesYesnoc Woods Nature Park32.69Park and/or Natural AreaYesYesYes	Carthy Creek402.81Park and/or Natural AreaNoNoYes1.13dle Baker Creek31.16Park and/or Natural AreaYesNoYes3.62rison Woods Natural Area19.05Park and/or Natural AreaYesNoYesNo0.60unt Talbert Nature Park252.97Park and/or Natural AreaYesYesYes0.00vell Creek Canyon235.59Park and/or Natural AreaYesNoYes0.00vell Creek Natural Area210.79Park and/or Natural AreaYesNoYes0.06th Abbey Creek Natural Area210.79Park and/or Natural AreaYesNoYes0.17benter Creek Greenway15.59Park and/or Natural AreaNoYesYes0.69th Coffee Lake Creek35.23Park and/or Natural AreaNoNoYes0.69th Multnomah Channel308.90Park and/or Natural AreaNoNoYes0.23sh308.90Park and/or Natural AreaNoNoYes0.23gon Zoo64.24Park and/or Natural AreaYesYesYes0.00neo Woods Nature Park32.69Park and/or Natural AreaYesYesNo0.37	Carthy Creek402.81Park and/or Natural AreaNoNoYes1.13Ruraldle Baker Creek31.16Park and/or Natural AreaYesNoYes3.62Ruralrison Woods Natural Area19.05Park and/or Natural AreaYesNo0.60Single Familyunt Talbert Nature Park252.97Park and/or Natural AreaYesYes0.60Ruralrell Creek Canyon235.59Park and/or Natural AreaYesNoYes0.06Ruralth Abbey Creek Natural Area210.79Park and/or Natural AreaYesNoYes1.51Ruralth Beaver Creek Greenway15.59Park and/or Natural AreaNoYesYes0.17Single Familypenter Creek North115.35Park and/or Natural AreaNoNoYes0.69Ruralth Coffee Lake Creek35.23Park and/or Natural AreaNoNoYes0.99Ruralth Multnomah Channel308.90Park and/or Natural AreaNoNoYes0.23Ruralsh308.90Park and/or Natural AreaNoNoYes0.23Ruralgon Zoo64.24Park and/or Natural AreaYesYesYes0.00Parks and Open Spacesnco Woods Nature Park32.69Park and/or Natural AreaYesYesNo0.37Mixed Use Residential

									If SHS funds used, may not possible if not in
87	Oxbow Regional Park	949 65	Park and/or Natural Area	Yes	No	Yes	3.08	Rural	service district
07		515.05		1.05		105	5.00		Additional site analysis needed (unused space,
88	Pascuzzi Pond	12.26	Park and/or Natural Area	No	Yes	Yes	0.26	Industrial	zoning, permitting)
									If SHS funds used, may not possible if not in
89	Peach Cove Fen	100.60	Park and/or Natural Area	Yes	No	Yes	2.58	Rural	service district
									If SHS funds used, may not possible if not in
90	Pecan Creek Natural Area	24.69	Park and/or Natural Area	Yes	No	Yes	1.11	Rural	service district
									If SHS funds used, may not possible if not in
91	Penstemon Prairie	284.34	Park and/or Natural Area	Yes	No	Yes	1.86	Rural	service district
									Additional site analysis needed (unused space,
92	Pittock Acres Park	54.81	Park and/or Natural Area	Yes	Yes	No	0.00	Parks and Open Spaces	zoning, permitting)
									Additional site analysis needed (unused space,
93	Powell Butte Nature Park	613.87	Park and/or Natural Area	Yes	Yes	No	0.02	Parks and Open Spaces	zoning, permitting)
									Wetlands likely not possible, but site is large and
	Raleighwood Wetlands Natural								may have usable places. Additional site analysis
94	Area	7.48	Park and/or Natural Area	Yes	Yes	No	0.07	Single Family	needed (unused space, zoning, permitting)
0.5	Disharahara Carabaharahara								If SHS funds used, may not possible if not in
95	Richardson Creek Natural Area	99.33	Park and/or Natural Area	Yes	No	Yes	0.01	Rural	service district
00	Diverse Devel Dreivie	00.07	Devision of /our Nietuwell Avec	Vee	Ne	Vaa	2.24	Dunal	If SHS funds used, may not possible if not in
96	River's Bend Prairie	89.97	Park and/or Natural Area	Yes	No	Yes	3.24	Rural	service district Additional site analysis needed (unused space,
07	Prockwood at Pack Crock Trail	0.14	Dark and for Natural Area	Vac	Vac	Vac	0.25	Cinalo Fomily	
97	Brookwood at Rock Creek Trail	9.14	Park and/or Natural Area	Yes	Yes	Yes	0.35	Single Family	zoning, permitting) If SHS funds used, may not possible if not in
00	Rock Islands	70 71	Park and/or Natural Area	No	No	Yes	1 20	Rural	service district
90		70.71			NO	Tes	1.50	nulai	Additional site analysis needed (unused space,
aa	Rocky Butte Natural Area	17 91	Park and/or Natural Area	Yes	Yes	No	0.00	Parks and Open Spaces	zoning, permitting)
55	Nocky Butte Natural Area	17.51			103		0.00		Additional site analysis needed (unused space,
100	Scouters Mountain Nature Park	98 84	Park and/or Natural Area	Yes	Yes	Yes	1 17	Industrial	zoning, permitting)
100		50.04			105		1.17		
									Wetlands likely not possible, but site is large and
	Smith and Bybee Wetlands								may have usable places. Additional site analysis
101	Natural Area	1959.17	Park and/or Natural Area	Yes	Yes	Yes	0.01	Parks and Open Spaces	needed (unused space, zoning, permitting)
									Additional site analysis needed (unused space,
102	South Beaver Creek Greenway	59.58	Park and/or Natural Area	No	Yes	No	0.04	Parks and Open Spaces	zoning, permitting)
	-								If SHS funds used, may not possible if not in
103	Carpenter Creek South	50.65	Park and/or Natural Area	No	No	Yes	1.52	Rural	service district
	South Multnomah Channel								If SHS funds used, may not possible if not in
104	Marsh	45.80	Park and/or Natural Area	Yes	No	Yes	2.72	Rural	service district
									If SHS funds used, may not possible if not in
105	Springdale Natural Area	193.46	Park and/or Natural Area	Yes	No	Yes	1.86	Rural	service district
									Additional site analysis needed (unused space,
106	Springwater Corridor	259.69	Park and/or Natural Area	Yes	Yes	No	0.00	Parks and Open Spaces	zoning, permitting)
									Additional site analysis needed (unused space,
107	Springwater Woods	31.98	Park and/or Natural Area	Yes	Yes	No	0.81	Single Family	zoning, permitting)

									Additional site analysis needed (unused space,
108	Steamboat Park	0 99	Park and/or Natural Area	No	Yes	No	0.52	Multi Family	zoning, permitting)
100		0.55			103		0.52	iviaici i anniy	Additional site analysis needed (unused space,
109	Sunshine Butte	85 37	Park and/or Natural Area	Yes	Yes	Yes	1 39	Single Family	zoning, permitting)
105	Suisinie Butte	05.57		103	103		1.55	Single ranny	Additional site analysis needed (unused space,
110	SW Terwilliger Blvd Parkway	101 14	Park and/or Natural Area	Yes	Yes	No	0.00	Parks and Open Spaces	zoning, permitting)
110	Stor rentanger block rankway	101.14		103	103		0.00		Additional site analysis needed (unused space,
111	Towle Butte	15/1 22	Park and/or Natural Area	Yes	Yes	Yes	0.73	Single Family	zoning, permitting)
	Towie Butte	154.55					0.75		Additional site analysis needed (unused space,
112	Tryon Cove Park	7 36	Park and/or Natural Area	Yes	Yes	Yes	0.03	Parks and Open Spaces	zoning, permitting)
112	Tryon cove rank	7.50					0.05		Additional site analysis needed (unused space,
113	Tryon Creek State Natural Area	657 33	Park and/or Natural Area	Yes	Yes	No	0.00	Parks and Open Spaces	zoning, permitting)
115	Tryon creek state Natural Area	057.55		163	165		0.00	Faiks and Open Spaces	Additional site analysis needed (unused space,
11/	Tualatin Hills Nature Park	222 31	Park and/or Natural Area	Yes	Yes	No	0.02	Multi Family	zoning, permitting)
114		222.51			103		0.02	iviale raining	Additional site analysis needed (unused space,
115	Tualatin River Mile 6.7	1 83	Park and/or Natural Area	Yes	Yes	Yes	1.01	Single Family	zoning, permitting)
115		1.05		103	103		1.01	Single Farmy	If SHS funds used, may not possible if not in
116	Upper Abernethy	106 59	Park and/or Natural Area	No	No	Yes	3 79	Rural	service district
110	opper Abernetity	100.55			NO		5.75	Nurui	If SHS funds used, may not possible if not in
117	Upper Chicken Creek	38 49	Park and/or Natural Area	Yes	No	Yes	1 91	Rural	service district
117	opper enteren ereek	50.45			NO		1.51	Nurui	Additional site analysis needed (unused space,
118	Upper Johnson Creek	64 64	Park and/or Natural Area	Yes	Yes	Yes	0.76	Rural	zoning, permitting)
110	Upper Mitchell Creek Natural	04.04			103		0.70	Nurui	
110	••	14.02		Na	Vaa	Vaa	1 70	المطربية	Additional site analysis needed (unused space,
119	Area	14.93	Park and/or Natural Area	No	Yes	Yes	1.70	Industrial	zoning, permitting)
120	Mashline Drevents	1.07		Na	Vee	Na	0.15	Minad Llas Desidential	Additional site analysis needed (unused space,
120	Wachline Property	1.87	Park and/or Natural Area	No	Yes	No	0.15	Mixed Use Residential	zoning, permitting) If SHS funds used, may not possible if not in
121	Wenkers Corner Field Station	10 55		Vaa	Ne	Vaa	1 42	Dunal	service district
121	Wankers Corner Field Station	18.55	Park and/or Natural Area	Yes	No	Yes	1.42	Rural	If SHS funds used, may not possible if not in
177	Weber Farm Natural Area	212.69	Dark and /or Natural Area	Vac	No	Vac	2 07	Dural	service district
122	Weber Farm Natural Area	213.08	Park and/or Natural Area	Yes	INO	Yes	2.87	Rural	Additional site analysis needed (unused space,
172	West Bliss Butte	0E 1E	Park and/or Natural Area	Yes	Yes	Yes	0.00	Single Family	zoning, permitting)
123	west biss butte	85.15	Park and/or Natural Area	res	res	res	0.99	Single Family	Additional site analysis needed (unused space,
124	West Council Creek	14 15	Park and/or Natural Area	No	Yes	Yes	0.41	Single Family	zoning, permitting)
124	West Coulicit Creek	14.15			165		0.41		Additional site analysis needed (unused space,
125	Loll Wildwood Natural Area	26.02	Park and/or Natural Area	No	Yes	No	0.25	Darks and Onon Spaces	zoning, permitting)
125		20.82	Park and/or Natural Area		165		0.25	Parks and Open Spaces	Additional site analysis needed (unused space,
126	Whitaker Ponds Nature Park	25 75	Park and/or Natural Area	Yes	Yes	No	0.14	Parks and Open Spaces	zoning, permitting)
-		25.75		165	165		0.14	Faiks and Open Spaces	
	Wilkes Creek Headwaters						0.40		Additional site analysis needed (unused space,
127	Natural Area	20.71	Park and/or Natural Area	No	Yes	No	0.19	Parks and Open Spaces	zoning, permitting)
120	Willowette Cove	20.07	Deuly and /an Notestan 1 Au		No.	No.	0.01	Deales and Orace Course	Additional site analysis needed (unused space,
128	Willamette Cove	30.07	Park and/or Natural Area	No	Yes	Yes	0.01	Parks and Open Spaces	zoning, permitting)
120	M/IIIanaatha Nianaana Farrat	226.27	Deule and /an Notestania Au	Vaa	NIS	No.	0.40	Dunal	If SHS funds used, may not possible if not in
129	Willamette Narrows Forest	236.37	Park and/or Natural Area	Yes	No	Yes	0.46	Rural	service district
400	Wilson Creek Natural Ana-	ca 70			N	No. 1		Dung	If SHS funds used, may not possible if not in
130	Wilson Creek Natural Area	63.78	Park and/or Natural Area	No	No	Yes	1./4	Rural	service district

									Additional site analysis needed (unused space,
131	Paul and Verna Winkelman Park	24.14	Park and/or Natural Area	Yes	Yes	No	0.98	Rural	zoning, permitting)
101							0.00		Additional site analysis needed (unused space,
132	Woodard Park	19.90	Park and/or Natural Area	Yes	Yes	No	0.01	Parks and Open Spaces	zoning, permitting)
									Additional site analysis needed (unused space,
133	Woods Memorial Natural Area	46.03	Park and/or Natural Area	Yes	Yes	No	0.04	Parks and Open Spaces	zoning, permitting)
									Additional site analysis needed (unused space,
134	Gabbert Hill East	43.53	Park and/or Natural Area	No	Yes	Yes	0.58	Single Family	zoning, permitting)
									Additional site analysis needed (unused space,
135	Hogan Butte	8.23	Park and/or Natural Area	No	Yes	Yes	1.14	Single Family	zoning, permitting)
									Additional site analysis needed (unused space,
136	Columbia River Shoreline A	1.31	Park and/or Natural Area	No	Yes	Yes	0.17	Parks and Open Spaces	zoning, permitting)
									If SHS funds used, may not possible if not in
137	River Island	220.17	Park and/or Natural Area	Yes	No	Yes	0.27	Rural	service district
									If SHS funds used, may not possible if not in
138	Heritage Pine Natural Area	202.62	Park and/or Natural Area	Yes	No	No	0.05	Rural	service district
									Additional site analysis needed (unused space,
139	Catkin Marsh Natural Area	54.05	Park and/or Natural Area	Yes	Yes	No	0.03	Parks and Open Spaces	zoning, permitting)
									Additional site analysis needed (unused space,
140	Upper Mitchell Creek East	/6.56	Park and/or Natural Area	No	Yes	No	1.54	Parks and Open Spaces	zoning, permitting)
	Monata Minu	450.74			N 1 -	N ₂ -	F 43	Dung	If SHS funds used, may not possible if not in
141	Wapato View	150.71	Park and/or Natural Area	No	No	Yes	5.12	Rural	service district If SHS funds used, may not possible if not in
142	Gotter Prairie	17.25	Park and/or Natural Area	No	No	Yes	E 1E	Rural	service district
142		17.55	Park and/or Natural Area	INO	NO	Tes	5.15	Kulai	If SHS funds used, may not possible if not in
1/13	Quamash Prairie II	69.01	Park and/or Natural Area	Yes	No	Yes	5.00	Rural	service district
	Upper Mitchell Creek Natural	05.01			NO	103	5.00	Nurui	
	Area	20.90	Park and/or Natural Area	Yes	Yes	Yes	1 5 6	Industrial	Additional site analysis needed (unused space, zoning, permitting)
144	Alea	20.80		Tes	Tes	165	1.50	Industrial	Additional site analysis needed (unused space,
1/15	Peninsula Crossing Trail	9 1/	Park and/or Natural Area	No	Yes	No	0.01	Industrial	zoning, permitting)
145		5.14			103		0.01		Additional site analysis needed (unused space,
146	Westside Trail	32 04	Park and/or Natural Area	No	Yes	No	0.02	Single Family	zoning, permitting)
-	Canemah Neighborhood	52.01			105		0.02		Additional site analysis needed (unused space,
	Children's Park	1 55	Park and/or Natural Area	Yes	Yes	Yes	0.51	Single Family	zoning, permitting)
147		1.55			103	103	0.51		If SHS funds used, may not possible if not in
148	Howell South	106 88	Park and/or Natural Area	Yes	No	Yes	0 19	Rural	service district
140		100.00			110	105	0.15		Additional site analysis needed (unused space,
149	Oaks Crossing Natural Area	5.73	Park and/or Natural Area	No	Yes	No	0.26	Parks and Open Spaces	zoning, permitting)
				1			0.20		If SHS funds used, may not possible if not in
150	Mult Foreclosures 1995	2.23	Park and/or Natural Area	No	No	Yes	2.12	Rural	service district
				1					If SHS funds used, may not possible if not in
151	Spring Hill Natural Area	243.02	Park and/or Natural Area	Yes	No	Yes	3.12	Rural	service district
									If SHS funds used, may not possible if not in
152	Flagg Island	15.03	Park and/or Natural Area	No	No	Yes	1.88	Rural	service district
									Additional site analysis needed (unused space,
153	Broughton Beach	11.83	Park and/or Natural Area	No	Yes	Yes	0.94	Parks and Open Spaces	zoning, permitting)

				1					If SHS funds used, may not possible if not in
154	Cazadero North	2 00	Park and/or Natural Area	No	No	Yes	2 05	Rural	service district
		2.90			NO	165	2.95	nulai	If SHS funds used, may not possible if not in
155	Clear Creek North	107 52	Park and/or Natural Area	Yes	No	Yes	1 08	Rural	service district
		107.52				105	1.00		If SHS funds used, may not possible if not in
156	Baker Creek Woods	40.07	Park and/or Natural Area	No	No	Yes	3 54	Rural	service district
150	Baker ereek woods	40.07				103	5.54	Kurui	If SHS funds used, may not possible if not in
157	Tonguin Scablands	51 90	Park and/or Natural Area	Yes	No	Yes	0.91	Rural	service district
		51.50				105	0.51		If SHS funds used, may not possible if not in
158	Bakers Ferry Natural Area	58 78	Park and/or Natural Area	No	No	Yes	0.42	Rural	service district
		56.76				100	0.12		If SHS funds used, may not possible if not in
159	Lower Tualatin Bluffs	82 71	Park and/or Natural Area	Yes	No	Yes	0 14	Rural	service district
		02.71		103		100	0.11		If SHS funds used, may not possible if not in
160	North Fork Deep Creek NA	46.82	Park and/or Natural Area	No	No	Yes	1.28	Rural	service district
									Additional site analysis needed (unused space,
161	Hogan Butte Nature Park	43.78	Park and/or Natural Area	Yes	Yes	No	1.11	Single Family	zoning, permitting)
	J					-	1		If SHS funds used, may not possible if not in
162	Kingfisher Natural Area	126.72	Park and/or Natural Area	No	No	Yes	4.08	Rural	service district
	0								If SHS funds used, may not possible if not in
163	Chinquapin Bluffs West	125.18	Park and/or Natural Area	No	No	Yes	5.01	Rural	service district
				-	-				If SHS funds used, may not possible if not in
164	Beef Bend Natural Area	139.01	Park and/or Natural Area	Yes	No	Yes	0.40	Rural	service district
									If SHS funds used, may not possible if not in
165	Lower Pecan Creek Natural Area	10 24	Park and/or Natural Area	No	No	Yes	1 29	Rural	service district
100		10.21				100	1.25		Additional site analysis needed (unused space,
166	Gabbert Butte Natural Area	143.42	Park and/or Natural Area	Yes	Yes	Yes	0.22	Single Family	zoning, permitting)
									If SHS funds used, may not possible if not in
167	Atfalati Prairie South	80.53	Park and/or Natural Area	No	No	No	1.32	Rural	service district
	College Nature Park at Beaver			-	-				Additional site analysis needed (unused space,
168	Creek	2 98	Park and/or Natural Area	No	Yes	No	0.03	Parks and Open Spaces	zoning, permitting)
100		2.50			103	110	0.00		If SHS funds used, may not possible if not in
160	North Fork Deep Creek NA South	77 75	Park and/or Natural Area	No	No	Yes	0.22	Rural	service district
109	North Fork Deep Creek NA South	11.15			NO	165	0.23	nulai	Additional site analysis needed (unused space,
170	Marine Drive Trail property	3 63	Park and/or Natural Area	No	Yes	Yes	0.14	Industrial	zoning, permitting)
170	Marine Drive trait property	5.05			163	163	0.14		
171	Brainard Cemetery	1 03	Cemetery	No	Yes	Yes	0.01	Parks and Open Spaces	Likely not possible to create shelter at cemetaries
1/1	Brainard Cemetery	1.05			163	163	0.01	raiks and Open Spaces	
172	Columbia Pioneer Cemetery	2 2 7	Cemetery	No	Yes	Yes	0.06	Parks and Open Spaces	Likely not possible to create shelter at cemetaries
1/2	continuer toneer centerery	2.27				103	0.00		Likely not possible to create sherter at temetaries
172	Douglass Cemetery	9 25	Cemetery	Yes	Yes	Yes	0.03	Parks and Open Spaces	Likely not possible to create shelter at cemetaries
1,3		5.55				105	0.05		
174	Escobar Cemetery	0.25	Cemetery	No	Yes	Yes	0.09	Single Family	Likely not possible to create shelter at cemetaries
	Grand Army of the Republic	0.25					0.00		, represente to the oriented at confectances
	Cemetery	2 25	Cemetery	No	Yes	Yes	015	Parks and Open Spaces	Likely not possible to create shelter at cemetaries
1/5		5.55			103	162	0.12	raiks and Open spaces	Likely not possible to create shelter at centeralles
176	Gresham Pioneer Cemetery	1 05	Cemetery	No	Yes	Yes	0.02	Single Family	Likely not possible to create shelter at cemetaries
110	Gresham Fibrieer Cemetery	1.95	Cemetery		165	165	0.05	Single Failing	Likely not possible to create shelter at celletaries

177	Jones Cemetery	2.27	Cemetery	No	Yes	Yes	0.04	Parks and Open Spaces	Likely not possible to create shelter at cemetaries
178	Lone Fir Pioneer Cemetery	28.12	Cemetery	No	Yes	Yes	0.00	Parks and Open Spaces	Likely not possible to create shelter at cemetaries
	Mountain View Corbett								
179	Cemetery	1.34	Cemetery	No	No	Yes	4.09	Rural	Likely not possible to create shelter at cemetaries
180	Mountain View Stark Cemetery	1.01	Cemetery	No	Yes	Yes	0.06	Parks and Open Spaces	Likely not possible to create shelter at cemetaries
181	Multnomah Park Cemetery	9.67	Cemetery	No	Yes	Yes	0.01	Parks and Open Spaces	Likely not possible to create shelter at cemetaries
182	Pleasant Home Cemetery	1.89	Cemetery	No	No	Yes	1.81	Rural	Likely not possible to create shelter at cemetaries
183	Powell Grove Cemetery	0.95	Cemetery	No	Yes	Yes	0.10	Parks and Open Spaces	Likely not possible to create shelter at cemetaries
184	White Birch Cemetery	0.42	Cemetery	No	Yes	Yes	0.09	Single Family	Likely not possible to create shelter at cemetaries
185	Glendoveer Golf Course	231.51	Golf Course	Yes	Yes	Yes	0.00	Parks and Open Spaces	Additional site analysis needed (unused space, zoning, permitting)
186	Metro Regional Center	3.18	Multi-purpose	Yes	Yes	Yes	0.00	Mixed Use Residential	Could consider underutilzed space such as parking lot or part of building, but that's likely short term. Metro Garage used as severe weather shelter.
187	Oregon Convention Center	18.01	Multi-purpose	No	Yes	Yes	0.00	Mixed Use Residential	Has been used as a severe weather shelter and cooling center
188	Metro Central	10.43	Transfer station	Yes	Yes	Yes	0.13	Industrial	Likely not possible to create shelter at a transfer station
189	NE 74th and Glisan	1.66	Unknown	No	Yes	Yes	0.01	Mixed Use Residential	Additional site analysis needed (unused space, zoning, permitting)
190	Elmonico	1.07	Vacant	No	Yes	Yes	0.12	Mixed Use Residential	Additional site analysis needed (unused space, zoning, permitting)
191	NW Civic Drive	6.72	Vacant	No	Yes	Yes	0.00	Mixed Use Residential	Additional site analysis needed (unused space, zoning, permitting)
	Metro South		Transfer station	Yes	Yes	Yes		Industrial	Likely not possible to create shelter at a transfer station
	Portland Expo Center		Multi-purpose	Yes	Yes	Yes		Industrial	Additional site analysis needed (unused space, zoning- particularly since this is zoned industrial, permitting)

Federal, State and Tribal Affairs Legislative Agenda

Work Session Topics

Metro Council Work Session Thursday, October 21, 2021

FEDERAL, STATE AND TRIBAL AFFAIRS LEGISLATIVE AGENDA

Date: 9/30/21 Department: GAPD Meeting Date: 10/21/21

Prepared by: Tyler Frisbee, Deputy Director, Anneliese Koehler, State and Regional Affairs Advisor and Katie McDonald, Tribal Liaison Presenters: Tyler Frisbee, Deputy Director, Anneliese Koehler, State and Regional Affairs Advisor and Katie McDonald, Tribal Liaison

Length: 45 minutes

ISSUE STATEMENT

This work session is the first opportunity to discuss the Metro Council's objectives for the 2022 Federal Legislative Agenda, the 2022 Oregon legislative session and to introduce the Tribal Affairs Agenda which is framed as a program work plan. Proposed legislative priorities and work plans will be discussed; additional concepts will be presented at a subsequent work session in November or December.

ACTION REQUESTED

The Council may wish to discuss specific legislative concepts, principles or direct staff to develop additional concepts before adopting its federal and state legislative agendas for 2022 or the Tribal Affairs agenda for FY2022-2023.

IDENTIFIED POLICY OUTCOMES

Support Metro's policy goals through engagement with Congress, federal agencies, the State Legislature, and sovereign tribal governments.

POLICY QUESTION(S)

- Does the Council wish to confirm previous policy direction under which staff is currently operating with respect to federal issues that are likely to surface in 2022?
- Does the Council wish to confirm previous policy direction under which staff is currently operating with respect to the upcoming State legislative session in February 2022?
- Does Council wish to adopt additional topics to the state legislative positions?
- Does the Council wish to request changes to the Tribal Affairs agenda as outlined in the attachments?

POLICY OPTIONS FOR COUNCIL TO CONSIDER

See attachments for Federal Affairs Legislative Agenda, State Legislative Principles, State Legislative Issue Sheets and Tribal Affairs Agenda. Note that these are initial drafts. We plan to come to you again in November or December for further refinement before final approval in January of 2022.

STAFF RECOMMENDATIONS

See attached Federal Affairs Legislative Agenda, State Legislative Principles, State Legislative Issues Sheets and Tribal Affairs Agenda.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

The Metro Government Affairs and Policy Development group is bringing all three of our government legislative agendas to Council in order to give Council an opportunity to see the full spectrum of our government to government work. This presentation includes our federal legislative agenda, state legislative agenda, and the full Tribal Government Work Program.

Over the course of the fall, we met with Metro Departmental leadership to discuss our federal and state legislative agendas and our tribal affairs agenda. We have incorporated their feedback into our presentation to you today and will continue to work closely with them as we work to develop our legislative priorities and work plans for 2022.

In addition, we are also working with our regional governmental partners and community partners to discuss their priorities for 2022 and look for opportunities for partnership and collaboration.

Federal Affairs

Council approved Metro's first comprehensive federal agenda in February of 2021. In general, staff will intend to bring an updated federal agenda to Council every two years, in order to align with the Congressional calendar. However, given the interest in aligning all of our legislative agendas and the flurry of activity in DC, staff are bringing this updated agenda to Council for a brief check-in.

With the passage of the American Rescue Act, and the Bipartisan Infrastructure Bill and possible Build Back Better bill, many of Council's urgent priorities due to the economic impacts of the pandemic have been addressed. The Zoo and the P5 Performing Arts Venues have cumulatively received \$18 million from the Shuttered Venue Grants program and the Metropolitan Planning Organization has also received increased funds to address emergency shortfalls. There will likely be future funding opportunities if the Bipartisan Infrastructure Bill and Build Back Better bill pass, including possible waste facilities funding, increased capital funding for transit projects and trail projects, and additional workforce funding programs. The update to the federal legislative agenda reflects the accomplishments Council has already achieved and the new landscape due to changing legislative opportunities.

State Legislative Affairs

The 2022 Legislative session is a short session lasting roughly a month. Unlike long sessions, short sessions focus on small, necessary budgetary tweaks and passing technical fixes and a few pieces of policy legislation. It is uncommon for large, controversial pieces of legislation or significant budget changes to occur. Many parties approach the short session with only one or two minor bills, and the session is set up to be limiting: legislators are only allowed two bills.

Similar to the 2021 Legislative Session, we anticipate that COVID-19 response – both public health and economic recovery -- to be top line priorities. While the situation remains fluid, we anticipate that much of the short session will be virtual. The Capitol will be open to the public, but many hearing rooms and offices will be closed because of earthquake retrofitting.

In addition, we anticipate that it will be a particularly political and partisan session. The combination of redistricting, an open seat for Governor, and a new Congressional seat creates a heightened political environment over the next year, including short session. Noncontroversial bills will become instantly controversial because of their sponsors, there will be highly partisan parliamentary maneuvering in committee and on the floor, and the rumor mill will be vigorous.

While it will be a unique short session, normal preparation are already under way. Bill concepts are being discussed and circulated and people are meeting to advance policy priorities. Similar to previous short sessions, staff expects to propose a modest legislative agenda that reflects well-established Council policy and/or legislative priorities that have previously been included in the Council's agenda.

Tribal Affairs

Metro Council desires to establish meaningful and mutually beneficial relationships with Tribes with interests in the greater Portland metropolitan area. These desires stemmed from increasing internal and external requests for Tribes involvement in Metro's work and recognition by the Metro Council that tribal relations should be part of Metro's work. Through this work, Metro seeks to recognize tribal sovereignty, respect tribal rights and explore opportunities to incorporate tribal interests and priorities into Metro's work wherever practicable

The Metro Council Tribal Affairs Agenda lays out the principles, priorities and areas for policy and program development for Metro to advance a Tribal Affairs program in fiscal years 2022- 2023 coordinated by the Government Affairs and Policy Development team in coordination with Metro Council, leadership and staff. Presently, more opportunities for Tribal Affairs program development exist than there is internal capacity to support. Additionally, it is recommended that consultation and engagement efforts initiated with Tribes are sustainable, transparent and meet the guiding principles proposed in the agenda. This agenda identifies how Metro should lead successful intergovernmental relations while Metro builds additional internal capacity and leadership through staff training, department-specific annual planning, and proposing a five year Tribal Affairs strategy.

This is a new and unique body of work in addition to federal, state and local affairs therefore it will take time to build relationships with the Tribes and internal capacity to lead and integrate this work. Coordinated external relationship building, focused policy development and sustained internal support across departments from the staff level to senior leadership and the Metro Council are imperative to success.

Metro's priorities should be informed by and consider the Tribes' priorities for Metro's Tribal Affairs program development. We propose to work with representatives from Tribes to present and discuss our Tribal Affairs agenda and incorporate their feedback. We plan to present updates to the Tribal Affairs agenda to Metro Departmental leadership and Metro Council in November or December for further refinement before final approval in January of 2022.

BACKGROUND

Council has previously adopted the Federal Affairs Legislative Agenda and Principles in February 2021. This updated agenda is rooted in the principles Council supported at that time and features slightly updated priorities given the new legislative landscape.

Council updated the State Legislative Principles in January 2021 in advance of the long session. Council's state legislative agendas are rooted in these principles.

Council has not previously adopted a Tribal Affairs Agenda. Today's discussion of the Tribal Affairs Agenda is the first of its kind for consideration by Metro Council.

ATTACHMENTS [Identify and submit any attachments related to this legislation or presentation]

- Federal Legislative Affairs Agenda
- State Legislative Affairs Principles
- State Legislative Affairs Issue Sheets
- Tribal Affairs Agenda

[For work session:]

- If yes, is draft legislation attached? □ Yes □ No
- What other materials are you presenting today? [INSERT]

METRO 2022 LEGISLATIVE ISSUE IDENTIFICATION

Person completing form/Department: Scott Klag, WPES Date: September 29, 2021

ISSUE: Extended Producer Responsibility for Mattresses

BACKGROUND: Extended Producer Responsibility (EPR) legislation for mattresses will create jobs, recover materials that can be recycled into new products and divert mattresses from solid waste facilities, where they are difficult and dangerous to manage.

Mattresses are present in the waste stream in significant numbers and pose a problem for the solid waste system. Thousands of mattresses from the Metro region and across Oregon are discarded each year. These bulky, hard-to-handle items are difficult to process as garbage and can pose a safety hazard to solid waste workers. Metal springs in the mattresses can damage equipment at our solid waste facilities.

A stewardship program will create new jobs at facilities set up to recycle mattresses. Disassembling mattresses can provide permanent employment and training opportunities for populations that face significant barriers to employment, including a history of incarceration or homelessness.

Once disassembled, up to 85 percent of a typical mattress is recyclable. Materials such as metal, foam, cotton and wood can be used to make new products and prevent the harvesting of virgin materials.

This program will build on Oregon's legacy of establishing successful EPR programs such as those for beverage containers, leftover paint and discarded electronics. Manufacturers selling their products into the state will be required to belong to a stewardship organization. The stewardship organization will be required to achieve certain standards of convenience to ensure services are available to all Oregonians. Like the Oregon paint producer responsibility law, an assessment will be collected at the point of sale when a consumer purchases a mattress; there will be no charge to drop off for recycling. The state will approve the assessment to ensure it will cover, but not exceed, the cost of the program.

RECOMMENDATION: Support a statewide EPR for mattress legislation.

A statewide program would be more beneficial than a regional program as it offers greater coverage and potentially greater efficiencies than a regional one and would be overseen by the DEQ, which has developed expertise with these types of programs. However, if the state legislation does not pass, Metro would develop and implement a program at the regional level.

LEGISLATIVE HISTORY: An unfortunate miscommunication last session resulted in the state wide EPR program for mattresses (SB 570) not passing. The Senate policy committee passed the bill (4-1-0) and it went to the Joint Ways and Means Committee. The mattress industry sent a letter to that committee in support of the bill. However, this fact apparently was not understood by the committee, leading to the bill not getting a hearing.

We have heard from the committee that this was unintended and that the bill should be brought forward again in 2022. The bill's 2021 sponsor, Senator Manning, has agreed to sponsor the bill in 2022. We also have heard that the mattress industry stands by their previous endorsement.

Metro has supported state legislation establishing a producer responsibility program for mattresses for the last three legislative sessions. After the 2019 session, the Metro Council passed Resolution 20-5069 supporting a state bill, but expressing Councilors' interest in pursuing such legislation regionally if it failed to pass at the state level.

Three other states (Connecticut, Rhode Island and California) have passed similar legislation and are successfully collecting and recycling hundreds of thousands of mattresses.

OTHER INTERESTED PARTIES: The Association of Oregon Recyclers (AOR) (composed of, among others, solid waste and recycling companies and local and state governments) supported the bill. BRING, a Eugene based reuse and recycling non-profit was strongly supportive. Other supportive parties include mattress recyclers. As noted above, the main association of mattress manufacturers has endorsed the bill.

IMPACT IF PROPOSED ACTION OCCURS: An EPR program for mattresses will provide the following for the region:

- **Policy:** An EPR program for mattresses aligns with multiple goals and actions within the 2030 Regional Waste Plan.
- **Equity:** The legislation requires provision of free, convenient and accessible collection opportunities for any person in the state. The legislation will increase collection from multifamily residences, low-income communities and communities of color.
- **Operations:** The increased services will reduce the number of mattresses in the waste stream and improve safety conditions for workers at transfer stations. More convenient disposal options should also reduce illegal dumping of mattresses.
- **Employment:** Mattress recycling facilities that will be supported by this legislation can create permanent employment and training opportunities for populations that face significant barriers to employment, including a history of incarceration or homelessness.
- **Climate:** Significant reductions in greenhouse gases and energy use have been shown to result from reuse and recycling of mattress components.

METRO COUNCIL 2022 LEGISLATIVE PRINCIPLES¹

GENERAL PRINCIPLES:

- 1. Successful Communities: Metro supports policy and funding solutions that facilitate the achievement of the six desired outcomes for successful communities that have been agreed upon by the region: vibrant, walkable communities; economic competitiveness and prosperity; safe and reliable transportation choices; leadership in minimizing contributions to climate change; clean air, clean water and healthy ecosystems; and equitable distribution of the burdens and benefits of growth and change.²
- 2. Racial Diversity, Equity and Inclusion: Metro envisions a region and state where a person's race, ethnicity or zip code does not predict their future prospects and where all residents can enjoy economic opportunity and quality of life. Metro therefore supports legislation that acknowledges past discrimination, addresses current disparities and promotes inclusion in public programs, services, facilities and policies.³
- 3. Climate Change: Metro supports efforts to combat and adapt to climate change and to meet the state's goals for reducing greenhouse gas emissions. To this end, Metro supports state policy and funding solutions that can help to reduce emissions in all of its main lines of business: land use and transportation planning and investment, housing and homeless services, solid waste management and prevention, parks and natural areas, and operation of visitor venues.
- **4. Pre-emption:** With respect to issues related to matters of regional concern, Metro's policy and funding authority should not be pre-empted or eroded.
- 5. Funding: To ensure a prosperous economy, a clean and healthy environment, and a high quality of life for all of their citizens, Metro and the region's counties, cities, and other service providers must have the financial resources to provide sustainable, quality public services. Accordingly, the Legislature should remove existing restrictions on local and regional revenue-raising authority and avoid enacting new limitations or pre-emptions, and all state mandates should be accompanied by funding.

SPECIFIC PRINCIPLES:

HOUSING:

6. Affordable Housing: Metro supports efforts to ensure that housing choices are available to people of all incomes in every community in our region; to reduce the number of households that are burdened by the combined costs of housing and transportation; to support people experiencing homelessness or at risk of losing housing; and to increase affordable opportunities for home ownership.⁴ To achieve these outcomes, Metro supports legislative actions consistent with Oregon's land use laws that increase the supply of both regulated affordable housing and market-rate housing; provide funding for both housing development and services that support lower-income renters and people experiencing homelessness; and provide reasonable protections for renters against arbitrary and unfair actions.

LAND USE AND URBAN GROWTH MANAGEMENT:

- 7. Oregon's Land Use System: Oregon's land use planning system provides an important foundation for the prosperity, sustainability and livability of our region; this system reflects the values of Oregonians and enjoys strong public support.⁵ The Legislature should exercise restraint and care when considering changes to Oregon's land use system.
- 8. Local Land Use Decisions: Management of the urban growth boundary is a complex undertaking that involves extensive analysis, public input, and a balancing of many factors. Urban growth management decisions have profound impacts not just on land at the boundary, but on communities within the boundary and on farms and other rural lands outside the boundary. For these reasons, the Legislature should establish the process and policy framework for local land use decisions and should affirm the authority of local governments, including Metro, to make specific decisions on local land use matters.
- **9.** Efficient Use of Existing Urban Land: Land within the urban growth boundary should be used efficiently before the boundary is expanded.⁶ Metro supports policy and funding strategies to facilitate efficient use of existing urban land, including investments in brownfield cleanup and industrial site readiness, as well as policy and zoning reforms that authorize and/or encourage more efficient development in residential and commercial areas.
- **10.** Need: The UGB should not be expanded in the absence of demonstrated need.⁷
- **11.** Integration of Land Use and Transportation: Land use and transportation planning should be coordinated so land uses do not undermine the efficiency and reliability of the transportation system and transportation investments do not lead to unintended or inefficient land uses.⁸
- **12. Annexation:** Cities are the preferred governing structure for providing public services to urban areas, and Metro supports reforms that will facilitate, or reduce barriers to, orderly annexation and incorporation.
- **13. Fiscal Responsibility:** Funding to support urban development should be generated at least in part by fees on those who directly benefit from that development.

SOLID WASTE:

- **14.** Life Cycle Approach: Metro supports efforts to minimize the health, safety, environmental, economic and social impacts associated with consumer products and packaging throughout all stages of a product's life cycle, beginning with resource extraction and continuing through design, manufacturing, consumption and disposal.⁹
- **15. Product Stewardship/Producer Responsibility:** Metro supports legislation providing that whoever designs, produces, sells or uses a product bears responsibility for minimizing the product's environmental impact throughout all stages of the product's life cycle. Under this market-based approach, the life-cycle costs of a product are internalized into its price rather than being forced onto the general public. This approach also provides an incentive for manufacturers to design and produce their goods in a way that minimizes waste, environmental impact and management costs.
- **16.** Equity in the Solid Waste System: The Regional Waste Plan aims to eliminate disparities experienced by people of color and historically marginalized communities from the full life cycle of products and packaging used and disposed in the region. Metro supports legislation that achieves this by advancing: community restoration, community partnerships and community investment; access to recycling, waste and reuse services and information; good jobs with improved worker health and safety, compensation and career pathways; business

opportunities in the local economy; and community health through minimized impacts from system operations - locally and in end markets - and from toxic chemicals in products and packaging. Legislation should require the establishment of targets, standards and compliance processes, as appropriate, to ensure progress toward equity goals.

TRANSPORTATION:

- **21. Transportation Funding:** Providing adequate funding for all transportation modes that move people and freight supports economic prosperity, community livability, public health and environmental quality. For these reasons, Metro supports an increase in overall transportation funding, investments in a safe and balanced multimodal transportation system that addresses the needs of all users, and flexibility in the system to provide for local solutions to transportation problems.
- **22. Climate Change:** Metro and its regional partners are committed to the Climate Smart Strategy, which includes actions needed to achieve state targets for reducing greenhouse gas emissions from transportation. The state should provide financial support for implementation of the Climate Smart Strategy.
- **23.** Safe and Equitable Transportation: Our region has adopted policies and developed programs to make it safer to walk and bike to school and other destinations, reduce serious traffic crashes and deaths, and reduce the disproportionate impact of traffic crashes and traffic enforcement in low income communities and communities of color.¹⁰ Metro supports legislation that advances safe and equitable transportation, including more effective and equitable enforcement of speed limits and other safety regulations, greater investment in infrastructure that improves safety (especially in disadvantaged communities), and greater authority for local governments to safely manage their transportation networks.

PARKS, NATURE AND CONSERVATION:

- 24. Parks and Natural Areas: Our region has invested heavily in protecting water quality and wildlife habitat and providing residents with access to nature and outdoor activity. Parks and natural areas are regional assets that support public health, environmental quality, strong property values and economic prosperity. For these reasons, Metro supports measures to increase local and regional authority to raise revenues to support parks and natural areas and to increase the level of state funding distributed to local governments for acquisition, capital improvements, and park operations.
- **25. Species Conservation:** Metro supports efforts to protect and restore wildlife habitat, to recover threatened and endangered species, and to create a better future for wildlife, both in Oregon and globally.
- **26.** Conservation Education: Metro supports efforts to provide stable and reliable funding to conservation education.

ECONOMIC PROSPERITY:

28. Metro Venues: Because the Oregon Convention Center, Expo Center, Portland'5 Centers for the Arts and Oregon Zoo contribute millions of dollars to the state and regional economies, Metro supports policy and funding solutions that facilitate the success of these venues in attracting visitors and enhancing the quality of their experiences.

AGENCY OPERATIONS:

- **29. Firearms and Public Facilities:** Metro supports legislation that increases Metro's authority to regulate the carrying of firearms on Metro properties and public venues, and opposes legislation that limits or reduces that authority.
- **30. Disaster Preparedness:** Metro supports legislative efforts to improve community disaster preparedness and resilience, with the goal of enabling the Portland region to provide for the immediate needs of its residents and businesses after a catastrophic event and facilitating the region's short- and long-term recovery.

¹ Unless otherwise noted, endnotes refer to applicable policy statements in Metro's <u>Regional Framework</u> <u>Plan</u> (RFP).

² RFP Chapter 1 (Land Use).

³ Strategic plan to advance racial equity, diversity and inclusion.

⁴ RFP Policy 1.3 (Housing Choices and Opportunities).

⁵ See <u>http://oregonvaluesproject.org/findings/top-findings/</u> (specifically item 5, Natural Resource Protections for Future Generations)

⁶ RFP Policy 1.1 (Compact Urban Form).

⁷ RFP Policy 1.9 (Urban Growth Boundary).

⁸ RFP Policy 1.3.13 (Housing Choices and Opportunities); Transportation Goal 1 (Foster Vibrant Communities and Efficient Urban Form).

⁹ <u>2030 Regional Waste Plan</u>, page 11.

¹⁰ 2018 Regional Transportation Plan, Chapter 3, Safety and Security Policies 1-9 and Transportation Equity Policies 1-7.

<mark>DRAFT 2.0</mark> METRO COUNCIL TRIBAL AFFAIRS AGENDA FY 2022 - 2023

Metro Council desires to establish meaningful and mutually beneficial relationships with Tribes with interests in what is now known as the greater Portland metropolitan area. Creation of the Tribal Affairs program at Metro stemmed from increasing internal and external requests for tribal involvement in Metro's work and appreciation from Metro Council and leadership that Tribes should be engaged in Metro's work in recognition of tribal sovereignty among other important considerations.

The Metro Council Tribal Affairs Agenda lays out the principles, priorities and areas for policy and program development for Metro to advance a Tribal Affairs program beginning in fiscal years 2022-2023. The Tribal Affairs program also distinguishes government-to-government relations with Tribes from Metro's engagement with urban Indigenous populations and communities in the greater Portland area.

Through this work, Metro seeks to support tribal sovereignty, honor tribal rights and explore opportunities to incorporate tribal interests and priorities into Metro's work. This is a new and unique body of work in addition to federal, state and local government affairs at Metro therefore it will take time to build relationships and internal capacity to lead these efforts. Coordinated external relationship building, focused policy development and sustained internal support across departments from the staff level to senior leadership and the Metro Council are imperative to success. This document captures key needs and goals of Metro Council as this new body of Tribal Affairs work is undertaken within the office of Government Affairs and Policy Development (GAPD) Office.

BACKGROUND

Tribes are independent sovereigns with inherent powers of self-government. Tribes have a political relationship with the U.S. government that does not derive from race or ethnicity. Treaties are listed among the elements that make up "the supreme law of the land" under the U.S. Constitution. Local governments, under this "Supremacy Clause" of the U.S. Constitution, must respect rights created by or reserved in Indian treaties and cannot pass ordinances or laws that interfere with, or are contrary to, federal law. In many treaties, Tribes ceded millions of acres of land to the United States in exchange for peace, a halting settler encroachment and certain terms, including the legal rights to hunt, fish and gather in their usual and accustomed areas both inside and outside of reservation land.

The lands of what is now known as the greater Portland metropolitan area are part of the aboriginal homelands, traditional territories and usual and accustomed areas of multiple Tribes who resided throughout the Willamette Valley and along the Willamette and Columbia Rivers and their tributaries in traditional villages, permanent communities and seasonal encampments. The relationship of Tribes, their lands and interests extends from time immemorial to the present day and beyond, with complexities that were further complicated by the removal and consolidation of families and bands to multiple reservations, which largely became the basis of confederations of Tribes today. Each Tribe's interests are distinct; the multiplicity of these interests overlap and intersect with the static boundaries of Metro's service area and the urban growth boundary in various ways.

Metro will engage and consult with Tribes on Metro projects, actions, decisions or policy making which have the potential to affect: tribal interests, the operation of tribal programs or services, include ground disturbing activities and or are proximal to waterways or ESA listed species designated habitat, as appropriate or requested by the Tribes.

Tribal interests may include but are not limited to:

- Tribal Lands such as ceded lands, aboriginal homelands, areas of cultural interest or usual and accustomed areas;
- Tribal treaty rights such as the right to hunt or fish in usual and accustomed areas and or implied rights such as sufficient availability and health of critical habitat necessary to support productive fisheries for treaty-guaranteed fishing;
- Cultural resources, ancestral remains or sacred sites;
- First Foods;
- Access to traditional areas of cultural or religious importance or usual and accustomed areas;
- Ability to exercise traditional, cultural or subsistence activities.

Tribes may be engaged in many aspects of Metro's work. For example, Tribes can be engaged to identify priority focal species for Parks and Nature conservation and restoration efforts, to help develop a program check list to protect cultural resources, and or within a particular project to provide input on implementation actions to protect tribal resources (e.g. where to place a hiking trail to avoid disturbance of a cultural resource, or introducing a traditional method for transplanting culturally important plant species). It is critical that Metro develop productive and trustworthy relationships with the Tribes so that Metro can proactively ask what areas of Metro's work the Tribes would like to engage on.

GOALS

Through its tribal relations work, Metro seeks to accomplish and realize the following goals:

- Build positive relationships with Tribes, tribal staff and representatives to explore opportunities for partnership and collaboration to understand and address tribal interests wherever practicable in Metro's work.
- Support tribal sovereignty and treaty rights, protect and preserve tribal interests and resources, and enhance opportunities for the pursuit of traditional lifeways of Tribes and Indigenous communities in the greater Portland area.
- Improve Metro's work through incorporating tribal perspectives and expertise, Traditional Knowledge, Indigenous world views and aboriginal rights.
- Increase the public's understanding of tribal interests, priorities and connections in the greater Portland area.

Relationships and partnerships with Tribes will support Metro's efforts to advance the region's six desired outcomes and other goals and priorities of the agency. More specifically, Metro hopes the development and implementation of its work can be informed by tribal priorities and interests, and where possible, done in conjunction and partnership with Tribes.

METRO TRIBAL AFFAIRS PRINCIPLES

The Metro Tribal Affairs Principles are the key values that will guide Metro's relations, engagement and informal consultation with Tribes. Metro Council affirms the following principles and recognizes their importance to facilitating successful tribal relations.

- **Support government-to-government relations** Metro's relationships and engagement with Tribes will draw upon principles of diplomacy. A governmentto-government relationship includes mutual recognition of the authority and position of the respective parties as governmental entities. Tribal governments will be engaged in a direct governmental manner which is distinct from community or public engagement approaches and engagement activities with urban Indigenous communities and populations.
- **Foster trust** Trust is a fundamental element of establishing a good relationship. Honesty and integrity will be maintained by Metro at all times to foster a solid foundation of trust, common understanding and vision.
- Engage in good faith Metro shall listen to and consider tribal comments carefully. Through engaging in good faith and with respect, solutions can be identified which embrace different cultures, values, interests and positions toward mutually beneficial ends. Metro will not engage Tribes on any predetermined outcomes or decisions and will strive to ensure each opportunity has the real

potential to make a positive difference for all involved Tribes, Metro and all the people/residents of our region.

- **Early planning** Metro shall plan to engage and consult with Tribes as early as possible. Planning will include providing ample notice of meetings, multiple meeting opportunities and wherever possible, conducting meetings and engagement at both Metro and tribal locations.
- **Collaboration** Valuable solutions arise through working together in generating, inventing and innovating in the co-production of knowledge that will guide Metro's work. Collaboration engenders mutual understanding and respect.
- Communication Continuous communication is critical. Meaningful dialogue is more than just a listening session; it is early, often and involves two-way dialogue and feedback. Metro will conduct its communication in a manner that is mindful of tribal preferences and will strive to provide full and candid project information at all times.
- Building towards agreement and consensus Metro will strive to reach agreement amongst all parties. This includes ensuring all parties are heard and respected, all ideas, concerns and options are explored, best available input and information is utilized, and decisions are made in a transparent manner. Metro will create opportunities where the interests of Tribes and Metro can be shared, discussed and evaluated together, involving technical and policy leadership of all parties as appropriate.
- Advance conservation and protection Metro supports efforts to protect, preserve and restore natural and cultural resources and First Foods which are integral to Tribes, tribal life-ways and historical and ongoing relationships to the landscape to create a better future in Oregon and globally.
- Advance racial equity Metro envisions a region and state where a person's race, place of birth, ethnicity or zip code does not predict their future prospects and where all residents can enjoy economic opportunity and quality of life. Tribes, their communities and urban Indigenous communities and populations will be included in Metro's racial equity work.
- Advance regional coordination Many of our region's challenges are big and complex and require coordination between cities, counties and other local forms of government. Metro commits to exploring opportunities to support regional planning and coordination with the involvement of Tribes.
- Commitment to Resources Metro will identify resources at its disposal to provide support to Tribes when limited resources may preclude or prevent their engagement with Metro. This includes providing technical assistance, accessibility assistance and other support services to ensure participation of Tribes and their representatives. When technical or subject matter expertise is

provided, Metro will explore available options to provide compensation in recognition of the Tribes' time and efforts to inform Metro's work.

• **Do no harm** – Metro will use best efforts to ensure no harm comes to the Tribes through working with Metro. Exploitation of Tribes, their input, intellectual properties or Traditional Knowledge shall never occur. Metro commits itself to being a good partner who works collaboratively with all parties, using differences if and when they arise to productively to build toward solutions and outcomes that do not erode trust or relationships between Tribes and Metro, or between Tribes.

PRIORITIES

Priorities for Metro's Tribal Affairs agenda are organized into four areas including operational activities, policy development, project support and legislative agenda. In this agenda, Metro Council is providing direction on near-term priorities and efforts that will support the agency to build longer term capacity to support a broad portfolio of tribal coordination activities. Priorities for [timeframe] listed below have been identified through support requests from Metro departments, projects with existing tribal relations or coordination activities and needs, and areas of Metro's work with the potential to affect tribal interests. Theses priorities will be updated on [timeframe] and adaptively managed utilizing a responsive approach which adjusts as relationships with Tribes develop and their input and priorities are shared with Metro.

OPERATIONAL:

Positive contact and relationship building efforts: Metro engages and consults with Tribes through government-to-government, elected-to-elected, and staff-to-staff relations which foster trust and aid in co-development of relationships, goals and objectives that can be formalized in intergovernmental agreements such as memorandums of understanding.

Annual training calendar: Develop an annual training calendar and curated learning opportunities for Metro Council, leadership and staff to advance their understanding of the tribal relations and priorities, regional history and context, Federal and state Indian policy, and topical issues in Indian Country. Learning opportunities and trainings will be developed with input from Tribes and tribal organizations and equip Metro with the necessary knowledge, skills and abilities to support tribal coordination activities.

Department-specific Tribal Affairs planning - Support Metro departments in preparation, planning and development of annual work plans and strategies which describe how tribal coordination efforts and the Metro Council Tribal Affairs Principles will be integrated into department activities, projects and

management strategies. Annual work plans will include program of work development for tribal coordination meetings, identify staff with tribal coordination responsibilities, and identify milestones and structural processes which can be measured to assess progress towards successful tribal relations and outcomes annually.

Government Affairs Tribal Affairs strategy development – The Government Affairs and Policy Development department shall develop and propose a five year strategic plan to advance necessary operational, policy, project-specific and legislative priorities in support of a robust Tribal Affairs program.

POLICY DEVELOPMENT:

Cultural Resources Protection Policy - Support development of a Metro-wide Cultural Resources Protection Policy to ensure protection and preservation of cultural resources in Metro projects and on Metro publicly-owned and operated properties and facilities in the greater Portland area.

Tribal Consultation Framework - Support development of a Metro-wide Tribal consultation framework that provides guidance to Metro staff on how to initiate and lead informal consultation and engagement with Tribes in Metro's work. Where appropriate, this work should identify linkages and make recommendations for distinctions and necessary updates to the <u>Strategic Plan to</u> <u>Advance Racial Equity</u> and the <u>Public Engagement Guide</u>.

All of Metro's Tribal Affairs policy development efforts will be done in coordination with Tribes, tribal staff and their representatives.

PROJECT WORK:

Willamette Falls Legacy Project – Provide tribal relations support Metro Council, leadership and staff to: develop of a new project governance agreement which includes Metro, Oregon City, Clackamas County, the State of Oregon, and all Tribes engaged in the project and their designated representatives including the Willamette Falls Trust; support best use of Metro bond funding; realize the project's four core values; and develop relationships with all involved parties.

Willamette Cove - Support the Special Projects and Parks and Nature project teams in planning and engaging Tribes in the remediation and future potential park development phases of the project regarding habitat restoration and conservation priorities and passive recreation opportunities at the site.

2019 Parks and Nature Bond - Support Parks and Nature staff refinement and implementation planning efforts to guide engagement efforts with Tribes. Longer term, support Parks and Nature staff efforts for programmatic and project-specific engagement on Bond program areas and projects of mutual interest to Tribes such as land acquisitions and habitat restoration activities.

Levy Renewal - Support Parks and Nature staff planning efforts for a levy renewal including strategic engagement with partners to identify levy priorities and objectives including Tribes. Longer term, support Parks and Nature staff efforts for programmatic and project-specific engagement on levy-funded projects of mutual interest to Tribes.

LEGISLATIVE:

Metro's legislative and tribal affairs staff will work together to create a recommended slate of priorities for Metro Council to discuss and possibly add to their agenda. Priorities include supporting legislation with:

- Nexus with Metro's current work;
- Priorities advanced by Tribes, tribal leadership and Indigenous legislators;
- Priorities that advance government-to-government relations and strengthen requirements for tribal consultation;
- Priorities that promote substantive inclusion of Tribes and Indigenous people in decision making;
- Wide-spread tribal and community support with particular emphasis on the Tribes in our region;
- Priorities that acknowledge past and ongoing discrimination and/or oppression of Tribes and Indigenous communities and populations;
- Priorities that work to dismantle ongoing system of oppression and/or work to rectify past harms.

Metro advances its legislative priorities through a variety of methods including signing onto letters, written and or oral testimony, and lobbying legislators. When advancing tribal affairs legislative priorities, Metro's role will be as an ally, striving to respect the requests of Tribes and tribal organizations on the appropriate method to indicate Metro's support. Metro will not supplant any Tribe or tribal organization's efforts on legislative priorities.



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METRO COUNCIL 117th CONGRESS FEDERAL LEGISLATIVE AGENDA

The Metro Council 2021-2022 Federal Legislative Agenda lays out the principles, priorities, and issues for Metro to track at the regulatory and legislative level for the 117th Congress. This Congress represents a unique time for our federal government and for Metro: there are significant needs to ensure that we emerge from the COVID-19 public health pandemic economically stronger, more equitable, more sustainable, and more resilient and ready to tackle the climate change, inequality, and racial justice crises. To do so will require coordinated, focused policies and sustained investment at all levels of government. This document captures the key needs and goals of the greater Portland area as we embark upon the recovery our region needs.

METRO COUNCIL 117th CONGRESS FEDERAL LEGISLATIVE PRINCIPLES

The Metro Council 2021-2022 Federal Legislative Principles are the key values that guide Metro's engagement on any issue and apply to all our policy and funding priorities.

ADVANCE RACIAL EQUITY

Metro envisions a region and state where a person's race, place of birth, ethnicity or zip code does not predict their future prospects and where all residents can enjoy economic opportunity and quality of life. Metro therefore supports policies that acknowledge past discrimination, eliminate current disparities and promote inclusion and accessibility in public programs, services, facilities and policies. Metro supports removing barriers to the full participation of Black, Indigenous, and immigrant communities as well as all communities of color in economic and social opportunities. Metro also recognizes the need for disaggregated data to help decision-makers better understand the needs and challenges faced by Black, Indigenous and People of Color, and efforts to center those lived experiences in decision-making.

SUPPORT GOVERNMENT TO GOVERNMENT TRIBAL RELATIONS

Support Government-to-Government Tribal Relations: Metro acknowledges centuries of systemic harm to our tribal partners, including genocide, forced land removal, land and property theft, and the breaking of agreed-upon treaty rights. These actions were supported and often carried out by governments at the federal, state, regional, and local levels. Metro will track and advocate for strengthening requirements and incentives regarding government to government engagement and other initiatives that are intended to expand the role that tribal partners and indigenous peoples have in government decision-making.

TACKLE CLIMATE CHANGE, RESTORE CLIMATE INTEGRITY

Metro supports efforts, policies, and bold investments to combat and adapt to climate change and to reduce greenhouse gas emissions at the local, regional, state, national, and international levels. Metro seeks to advance policies, programs, and projects that incentivize or require greenhouse gas emissions reduction, advance planning efforts to reduce greenhouse gas emissions and support climate adaptation, and facilitate data collection to improve greenhouse gas and climate pollution monitoring. Metro also supports policies that use possible revenue from carbon reduction fees to support family wage jobs, job training, transportation investments that reduce greenhouse gas emissions, and climate pollution mitigation programs.

FACILITATE REGIONAL COORDINATION AND GOVERNANCE

Support Regional Planning and Coordination: Many of our country's challenges are big and complex. While cities and counties play a key role in enacting policy change and improving the lives of their constituents, many of the most pressing issues require coordination between cities, counties and other local forms of government. Metro supports policies that advance regional coordination on policy challenges that ignore boundaries and require cooperation and alignment among cities and counties.

PROMOTE SUCCESSFUL COMMUNITIES

Metro supports legislation that facilitates the achievement of the six desired outcomes for successful communities that have been agreed upon by the region: vibrant, walkable communities; economic competitiveness and prosperity; safe and reliable transportation choices; leadership in minimizing contributions to global warming; clean air, clean water and healthy ecosystems; and equitable distribution of the burdens and benefits of growth and change.

PROTECT AND INCREASE FEDERAL FUNDING FOR OUR REGION

To ensure a prosperous economy, a clean and healthy environment, and a high quality of life for all of our residents, Metro and our partners must have the sustainable financial resources to provide quality public services and advance the principles and goal discussed above. This includes protecting existing federal funding, and supporting and seeking funding opportunities that align with Metro's Six Desired Outcomes and other regional priorities. After decades-long disinvestment at the federal level, if our country is to tackle the looming challenges of economic inequality, systemic racism, climate change, and recovering from the economic impacts of the COVID-19 pandemic, the federal government must be a partner.

METRO COUNCIL 117th CONGRESS FEDERAL LEGISLATIVE PRIORITIES

Metro's Legislative Priorities reflect our key federal advocacy efforts. These represent the bulk of Metro's federal engagement for the 117th Congress, although other efforts may emerge in response to unforeseen opportunities.

Affordable Housing

Unified control of Congress for the first time in more than a decade is likely to lead to a more robust discussion about federal housing policy and ways that the federal government can be more supportive of local efforts to address chronic homelessness in the U.S. This will likely include the rollback of the Faircloth Amendment (which forbids the construction of public housing projects), increased interest in the intersection of transit and housing through legislation like the More Housing Near Transit Act, and efforts at improving the Affordable Housing Tax Credit. In addition, the Biden Administration will likely look for ways to expand use of existing programs, such as the Low-Income Housing Tax Credit, and will roll back Trump Administration policies and guidance that limited or restricted eligibility for federal housing assistance.

- Housing Affordability: Metro supports policies that advance housing affordability, increase investments in regulated affordable housing programs to meet the national identified need, and provide diverse housing choices. This includes eviction moratoriums during times of national crisis, rental support and housing vouchers, and increased funding for services to help people stay in their homes. In order to reduce the barriers to home ownership, Metro also supports efforts to strengthen regulation of home mortgages and predatory lending practices. Metro believes all of these policies should also help dismantle racist housing policies and help people of color find safe, stable, and affordable housing. As part of that effort, Metro supports efforts to enforce and strengthen the Affirmatively Furthering Fair Housing rule.
- **Regional Housing Principles for National Housing Solutions**: The National Housing Solutions for Greater Portland policy proposals highlight the need to increase the supply of affordable housing coupled with accessible and high-quality wrap around services to ensure that everyone can find a place to call home. These principles were created in partnership with our region's Housing Authorities and Continuum of Care providers to identify shared housing values amongst regional partners and will help guide Metro's engagement with housing policy at the federal level.

Economic Rebuilding

The Biden Administration's Build Back Better agenda includes a strong focus on workforce training and development, and using federal funds to help workers, as well as small businesses, regain stronger footing. Congress is expected to consider progressive legislation including possible paid family leave, a higher federal minimum wage, and worker training programs.

- **Regional Economic Recovery Plan**: The bi-state Regional Economic Recovery Strategy identifies key investments and tactics the region is pursuing in order to emerge from the COVID-19 pandemic economically more robust, more resilient, and more equitable. The Strategy identifies key strategies and focuses on the need to help small businesses recover and grow, advance economic mobility through workforce training opportunities for individuals, and support families and children through better childcare and workforce policies, with an urgent focus on building opportunities and long-term wealth creation for Black, Indigenous, and People of Color (BIPOC).
- Workforce: Ensuring that the benefits of a growing and green economy are equitably distributed means ensuring that our workforce and workforce training programs are focused on ensuring women and BIPOC communities can fully participate and succeed. As Metro advances the Construction Career Pathways program in the greater Portland area, we encourage the federal government to support investments in regional training programs and changes in local hiring regulations to make it easier for local agencies and hiring partners to use public investment to ensure that people of color can find employment and advance their careers.
- **Metro Venues:** Due to the economic impacts of the COVID-19 pandemic, Metro may need ongoing support for our visitor-dependent entities, such as the Portland'5 Centers for the Arts, the Oregon Zoo, and the Convention Center. These venues are regional assets that contribute millions of dollars to the state and local economies, and are key to regional economic recovery. As necessary, we support federal aid to facilities that provide for public access to arts, education, and culture and boost tourism, in order to help these facilities survive the COVID 19 pandemic.

Safe and Reliable Transportation

Metro Council and JPACT have worked together to develop a robust federal agenda to help the region build and operate the transportation projects necessary to reach our Climate Smart goals, our resiliency projects, our maintenance projects, our Vision Zero goals, and ongoing congestion in the greater Portland region.

• Innovative and Stable Transportation Funding: In order for our transportation system to tackle our region's biggest challenges, including slowing climate change, increasing traffic safety, advancing racial equity, and supporting everyone's ability to move around our region safely, affordably, and easily, the region needs a robust and multimodal transportation funding approach. Metro supports an increase in overall

transportation funding, investments in a safe, electric, and balanced multimodal transportation system that addresses the needs of all users, and flexibility in the system to provide for local solutions to transportation problems. Given the significant underinvestment in transit at the federal and state levels as compared to what is needed to implement the Climate Smart Strategy, Metro particularly supports increased investment in transit capital and operations.

Given the need for long-term, stable transportation funding sources, Metro supports innovative approaches, including congestion pricing, that better connect system performance, outcomes such as reduced climate pollution or improved access for people of color, and road usage with transportation funding mechanisms. There should be funding and policy changes to support exploring these innovative revenue mechanisms at the federal, state, and regional level, and ensuring that revenue from these innovations supports a cleaner, more equitable transportation system.

In addition, the region has spent two years identifying key transportation needs through the Let's Get Moving process; funding for the projects and programs in that proposal is a key interest for Metro. Metro supports policies that make it easier to seek funding for these projects, particularly the corridor-long transit projects, and in general supports efforts to make more transportations funds available at the regional level in order to advance regional goals around reducing greenhouse gas emissions and building a safe, equitable, affordable transportation system.

- Joint Policy Advisory Committee on Transportation (JPACT) Federal Legislative Agenda: This agenda has included policies to support Vision Zero at the federal level, increase transit funding and funding for Safe Routes to Schools, provide set-aside funds for orphan highways, and provide funding for specific regional projects. Metro supports these policies as approved by JPACT and the Metro Council.
- **Coordinated Transportation Planning**: Metro supports policies and funding that highlight the importance of equitable, comprehensive, regional transportation planning; connect transportation, housing, and economic development; and that increase accountability for planning and funding decisions through stronger performance metrics at the federal level.
- Trails and Outdoor Recreation Funding: As both a parks operator and a regional planning agency, Metro supports increasing federal funding to plan, design, and build non-motorized trails and trail systems for recreation and transportation purposes.

Clean Air, Clean Water, and Healthy Ecosystems

The Biden Administration has been very clear that fighting climate change is a key priority, and this includes efforts to protect clean air and clean water from climate pollution and other toxics. This is likely to begin with a focus on undoing many of the Trump-era environmental rollbacks, but will also include additional efforts to strengthen the Clean Water and Clean Air Acts, incorporate an environmental justice lens onto federal decision processes, and better account for the cost of externalities, such as climate pollution, in federal rulemaking. The Department of Interior is also expected to Metro Council 2021-2022 Federal Legislative Agenda | greater Portland, Oregon act as a strong steward, with a focus on supporting access to and preserving the longterm health of our public lands.

- Clean Air, Clean Water, and Wildlife Habitat: Our region has invested heavily in protecting water quality and wildlife habitat and providing residents with access to nature and outdoor activity. Parks and natural areas are regional assets that support public health, environmental quality, strong property values and economic prosperity. Metro supports regulatory action and funding efforts that increase access to open spaces, reduce air, water, and climate pollution, and protect vulnerable habitat.
- Safe, Healthy, Sustainable Products and Product Disposal: Metro supports legislative efforts to ensure that whoever designs, produces, sells or uses a product bears responsibility for minimizing the product's environmental impact throughout all stages of the product's life cycle, particularly when the product involves the use or disposal of toxic substances. Under this market-based approach, the life-cycle costs of a product are internalized into its price rather than being forced onto the general public. Metro supports efforts to minimize the health, safety, environmental, economic and social impacts associated with consumer products and packaging throughout all stages of a product's life cycle, beginning with resource extraction and continuing through design, manufacturing, consumption, recycling, and disposal.
- **Open Space Preservation and Access:** The COVID 19 pandemic and the increased vulnerability to natural hazards due to climate change have both demonstrated the need for open space to facilitate safe, accessible outdoor recreation and protect natural systems that increase community and ecosystem resiliency and recovery. Metro supports efforts to increase funding for state, regional, and local entities to protect and preserve open space.
- Willamette Falls: As a key partner in the Willamette Falls Legacy project, Metro has successfully negotiated continued public access and development of a riverwalk in partnership with the new property owner; the Confederated Tribes of Grand Ronde. The restoration and redevelopment of the abandoned mill site will require significant time and funding. Metro is planning to work collaboratively to pursue federal funding opportunities for shovel ready projects, such as Phase 2 of the Riverwalk, cleanup of environmental contaminants on-site, restoration of key habitat, protection of economic development opportunities, public access, and co-development of facilities that can be used by Tribal members and the public. Metro also supports funding efforts to resolve long term issues with the Willamette Falls Locks, which are under the jurisdiction of the Army Corps of Engineers.

METRO COUNCIL 117th CONGRESS FEDERAL LEGISLATIVE ISSUES TO TRACK

Metro's Federal Legislative Issues to Track are policies that the agency supports, but either are not top priorities or are not expected to have a lot of opportunity for Metro to engage in during the 117th Congress.

- **Disaster Preparedness:** Metro supports policy and funding efforts to improve community disaster preparedness and resilience, with the goal of enabling the Portland region to provide for the immediate needs of its residents and businesses after a catastrophic event and facilitating the region's short- and long-term recovery. This includes investment in transportation and waste removal infrastructure, long-term planning efforts, and policies to support other immediate and long-term recovery needs, such as those identified in the regional Emergency Transportation Resiliency Plan.
- Waste Prevention Innovation and Authority: Metro supports efforts to align federal policy with best practices in waste prevention and recycling, but any efforts to create standard guidance, whether administrative or legislative, must support the role of states and localities to innovate and go beyond what is federally required.
- **Species Conservation**: Metro supports efforts to protect and restore wildlife habitat, to recover threatened and endangered species, and to create a better future for wildlife, both in Oregon and globally.
- **Conservation Education**: Metro supports efforts to provide stable and reliable funding for conservation education.
- **Tools to Advance Better Land Use Planning**: The federal government has limited tools to engage in land use planning, but Metro supports efforts to advance sustainable, equitable land use planning at the national level.
- **Brownfields**: As a regional partner in brownfield cleanup, Metro supports legislative efforts and funding efforts to expand brownfield cleanup efforts, particularly in urban areas, and in areas where the pollution impacts disproportionately hurt communities of color.
- **Clean Up of Portland Harbor**: Metro will monitor developments regarding the Portland Harbor and its Superfund status, as well as policy changes in the Water Resources Development Act that may have implications for efforts to clean up and revitalize properties in the Portland Harbor.
- **Recycling and International Agreements**: As international agreements, trade negotiations, and other international concerns impact our region's waste and recycling operations, Metro engages in these conversations when necessary and productive.
- **Diesel Emission Reductions**: Metro supports continued efforts to reduce reliance on diesel fuel, particularly for garbage and recycling collection vehicles, construction vehicles, or public transit vehicles that travel disproportionately in communities of color.
- Firearms and Public Facilities: Metro supports legislation that increases Metro's authority to regulate the carrying of firearms on Metro properties and public venues, and opposes legislation that limits or reduces that authority.
- Human Resources, Agency Operations: Metro tracks and may weigh in on federal policy and regulatory changes that impact employees, worker pay, work place environment, and other agency operations. Metro supports policies that advance paid family leave, living wage jobs (including a \$15/hour federal minimum wage), paid sick leave, and programs that support equitable hiring, training, and compensation practices.

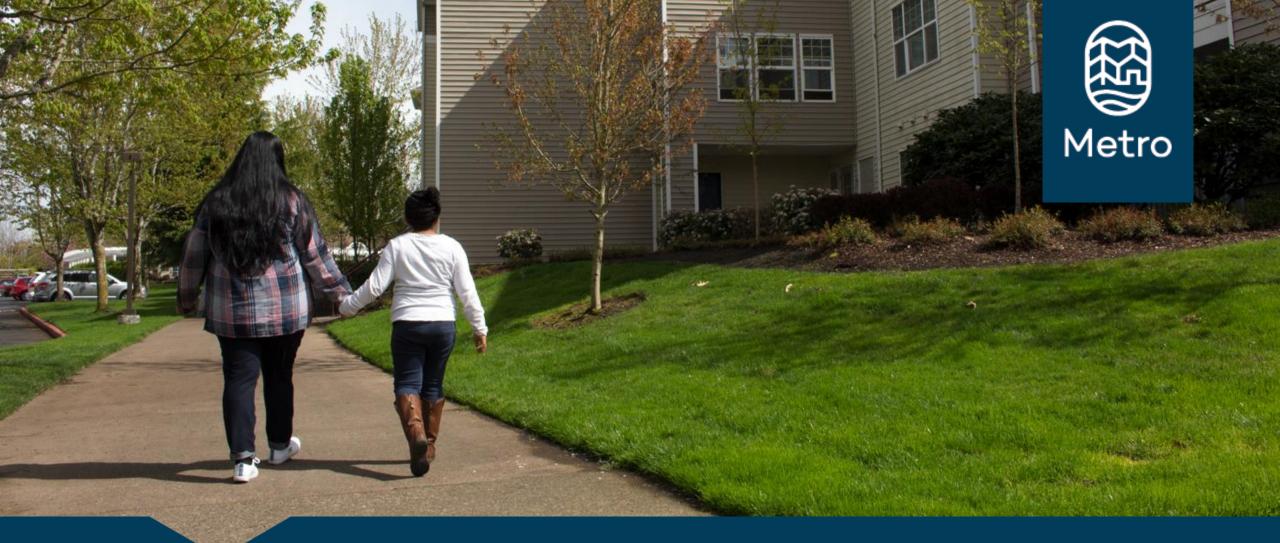
Materials following this page were distributed at the meeting.

Insert Whereas

WHEREAS, the 2020 U.S. Census identified the Metro population as 1,670,601, thereby establishing an average district population of 278,434

Move criteria

- Move (b) school districts to (g)
- Other criteria remain in same order



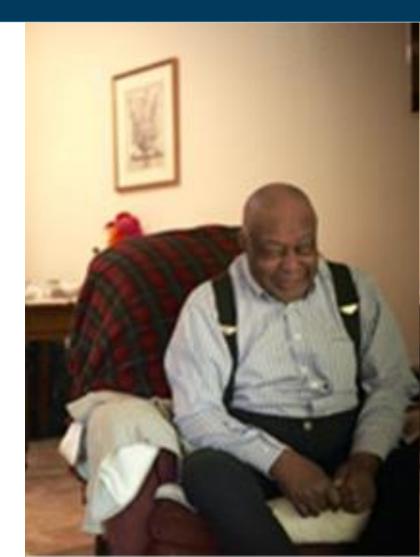
Metro Regional Supportive Housing Services Resolution 21-5187A

Metro Council | October 21, 2021

Resolution 21-5187A

Council requested a report that includes:

- The current scope of unsheltered homelessness across the three counties
- The current and planned shelter capacity across the region by this winter
- An inventory of Metro-owned properties that could be considered for siting shelter





Part 1: Local contextPart 2: Building a system of carePart 3: Staff recommendations



SHS: A vote to prevent & reduce homelessness

From Measure 26-210:



"Rents and housing prices have risen faster than wages, making it especially hard for people living on fixed retirement or disability incomes to afford housing."

"Measure funds supportive housing services to prevent and reduce homelessness in Washington, Clackamas, and Multnomah counties within district boundaries."



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Portland recognized by White House for effective end to veteran homelessness

by KATU.com Staff | Saturday, December 10th 2016



Ending homelessness



AVERAGE MONTHLY

HOUSING RATE

(MINIMUM 3)





PART 1: Our local context

Causes of homelessness

Some common situations:

- Can no longer afford current housing
- Fleeing an unsafe situation
- Must vacate current housing



• Can no longer maintain housing without services supports

Structural and historical factors that lead to the above

People centered practices

Housing First



Housing Only

Housing First is <u>an approach</u> to quickly and successfully connect individuals and families experiencing homelessness to **permanent housing without preconditions and barriers to entry**. **Assumes everyone is "ready" for housing**.

Supportive services are offered to help access care and support needed to maintain housing and achieve better quality of life.

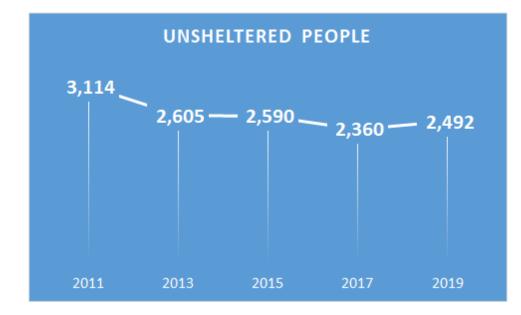
Housing is a platform for health, well-being and recovery.

Scale of homelessness

HUD Point-in-Time Count : A count of sheltered

and unsheltered people experiencing homelessness (HUD definition) on a single night in January.

- Best available data to understand scale of homelessness at any given time
- Unsheltered count only happens (Multnomah & Clackamas) on oddnumbered years
- Steady increase in those experiencing <u>chronic homelessness</u>



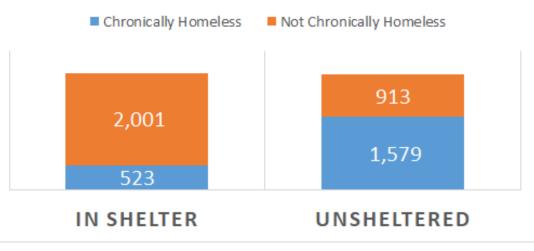
Scale of homelessness

2019 Point-in-Time Count

5,016

people experiencing homelessness in the region in 2019 (HUD Point-in-Time data)

2019 REGIONAL SHELTERED AND UNSHELTERED PEOPLE



2020 Estimates **6,035**

people experiencing homelessness in the region (estimated)

3,369 people in shelter*

Unsheltered Estimate: 2,666 people

Chronically Homeless Estimate (subset of above) **2,417** people

*All counties perform counts of sheltered people each year

COVID Impact - Visibility

• Since March 22, 2020 CDC guidelines included moratoriums on displacing encampments

"Clearing encampments breaks connections between people experiencing homelessness and service providers and can increase the likelihood of spreading the disease to new communities"

- Risk of congregate shelter during COVID
- Seeking community support in encampments
- Seeking access to critical services
- Displacement & eviction people still displaced from where they were living

COVID effect on impact reduction services

City of Portland Action	Fiscal Year 18/19	Fiscal Year 19/20	Fiscal Year 20/21
Campsite removals	2,828	2,169	248
Average cost per removal	\$762	\$1,713	\$2,505
Garbage collected, in tons	1,954	3,275	3,965

Data from City of Portland Homeless & Urban Camping Impact Reduction Program Performance Measures

Housing navigation and placement halted temporarily

Outreach efforts halted temporarily

SHS significantly expanding shelter, housing and outreach resources

SHS: Acting with urgency

900+ new shelter beds in first year

- 40% capacity increase
- 700 beds by Winter

2,400+ households served with housing services

- People experiencing homelessness
- People on the edge of homelessness



Winter strategy

Strategies for this winter:

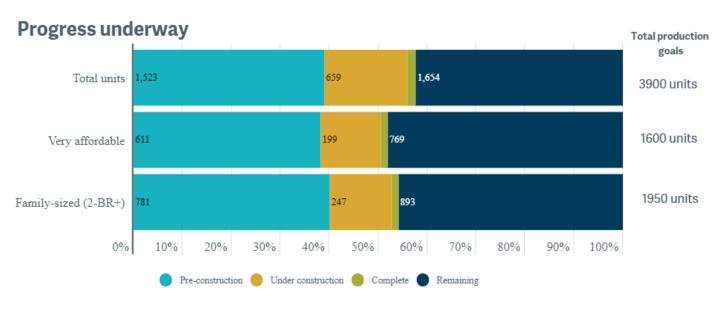
- Expanded outreach teams with behavioral health and housing search supports
- Distribution of survival gear
- More shelter beds: +700 across region
 - Update: even more beds: +400
- More shelter options alternative shelter, motels, sanctioned camps
- No turn away policy for shelter
- Flexible rent assistance



Ending homelessness requires homes: Metro Affordable Housing Bond



Credit: CDP/Hacienda CDC



Resources committed



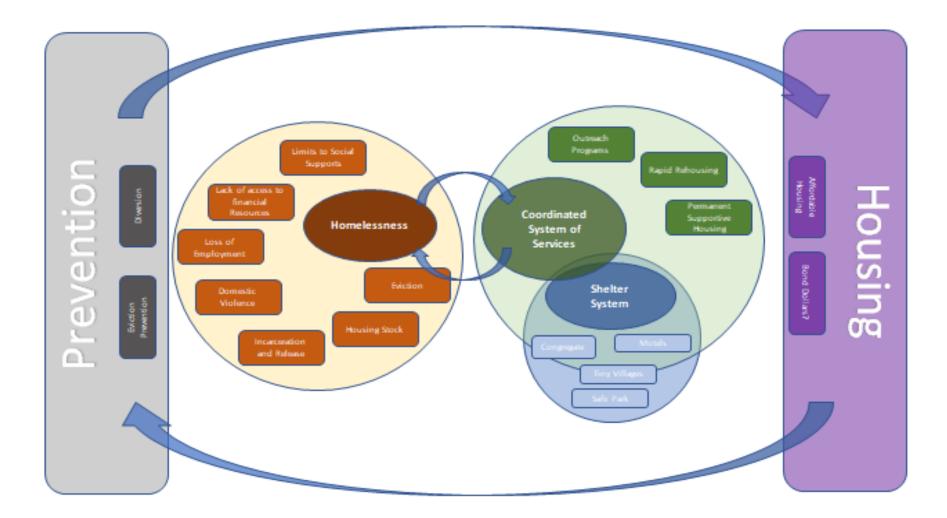
Ending homelessness requires homes: Metro Affordable Housing Bond

PSH Goals	PSH Units In Pipeline	Earliest Completion	Remaining	Production Goal (LIS)
City of Portland	115	20 by Fall 2021	185	300
Washington County	136	8 by Fall 2021	0	100
Clackamas County	82	25 by Spring 2021	N/A	N/A
Gresham	30	30 by Spring 2022	N/A	N/A
Hillsboro	8	8 by Summer 2023	N/A	N/A
TOTAL	371	-	185	400

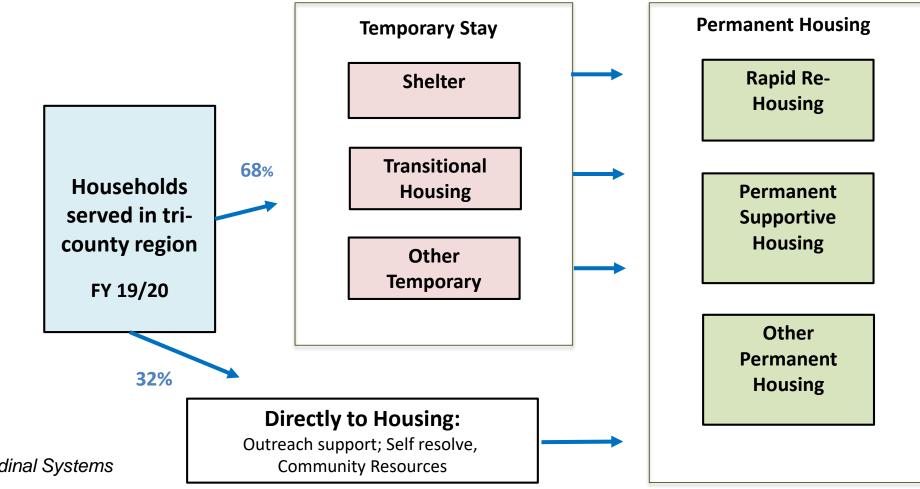


PART 2: Building a system of care

Homelessness response system



Shelter: One part of a housing crisis response system



2019 HUD Longitudinal Systems Analysis Data

Shelter's role

- Temporary shelter is an important component of an effective homelessness response system
- It is imperative that current shelters are fully utilized and that there are immediate opportunities for shelter guests to connect to **secure permanent housing**
- A community must consider how each person will **exit to housing** from that shelter

Shelter: One part of a housing crisis response system

Effectiveness of shelter is key in addressing unmet need.

"Shelter can become a more effective and efficient part of a **systemic response** to prevent and end homelessness, no longer operating as individual or standalone programs, but functioning as part of a coordinated system of programs working together to provide everyone with **permanent housing solutions quickly**."

- United States Interagency Council on Homelessness

How many shelter beds are needed?

We must first answer:

- How many people are newly becoming homeless and how fast?
- Who does shelter need to serve?
- How accessible is shelter for those who need it?
- What is our ability to :
 - Move people out of shelter and into permanent housing?
 - Move unsheltered people into permanent housing?
 - Prevent people from falling into homelessness?



Who does shelter serve?

On the night before their shelter stay, households across the region were:

- Living unsheltered (38%)
- Staying in another shelter or transitional housing (21%)
- Staying in another temporary situation (with friends/family) (3%)
- Staying in an institution (18%)
- In Permanent Housing (15%)



59% of those served in shelter were homeless for the first time

Where do people go after shelter?

Across the tri-county region in 2019, households exited shelter to:



Ends homelessness (28%)

• Permanent housing

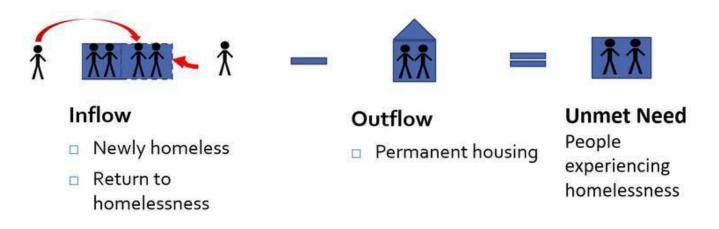
Does not end homelessness (72%)

- Transitional housing
- Stay with friends/family
- Back into shelter
- Institutional Stay
- Back onto the Street

Demand: Inflow and outflow

Inflow: Out of housing and into homelessness

Homeless response systems experience client **"inflow"** from many different situations.



Outflow: Out of homelessness and into housing

Systems work hard to maximize **"outflow"** into permanent housing.

Factors that affect "outflow"

- Availability of permanent housing options
- Affordability of permanent housing options
- Support to find and secure housing
- Housing stability support services
- Discrimination & stigma
- Personal housing barriers



Aloha Quality Inn, Washington County

Shelter Demand and Outflow

When more people are placed from shelter into permanent housing, each shelter bed can serve more people each year.

Hypothetical example: We have 50 beds.

Housing-Based Resources	Shelter Bed Turnover	How Many Can Be Served?
Current tri-county system	2.7 times per year	135 people
Add more services in shelter to connect people to housing	5 times per year (assumed)	250 people
Add more services AND more available housing	8+times per year (assumed)	400 people
Manage demand with housing-focused outreach	N/A	+200 people
Manage demand with Prevention resources	N/A	+100 people

Balance is key

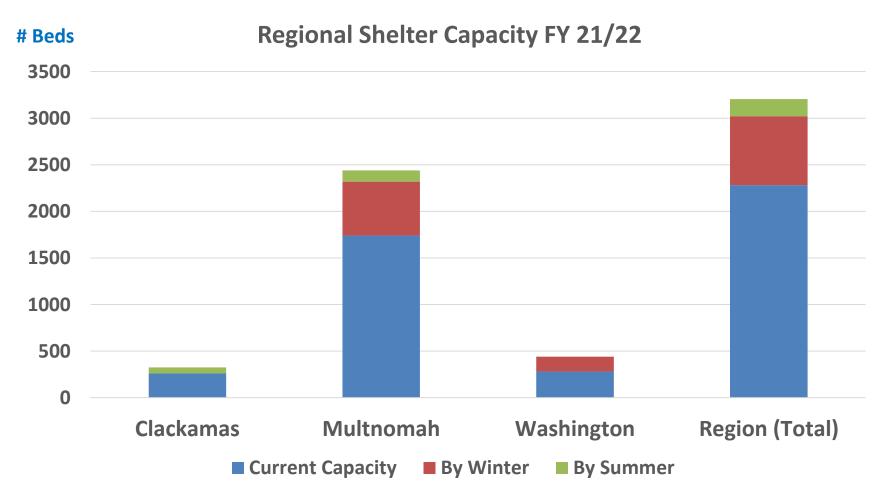
Emergency shelter does not end homelessness and is not a destination

Our ability to address the need depends on the effectiveness of each part of the system (prevention, diversion, outreach, shelter, housing)

Shelter first approach: Expensive and doesn't end a person's experience of homelessness

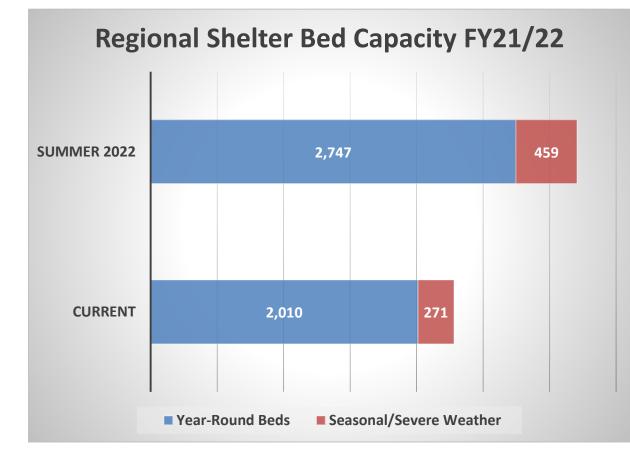


Regional shelter capacity



Bed totals include seasonal, overflow and severe weather capacity

Urgent response: New beds by June 2022



+40%

Total regional shelter bed capacity by summer 2022

SHS: Building hope

Bringing resources to meet the need:

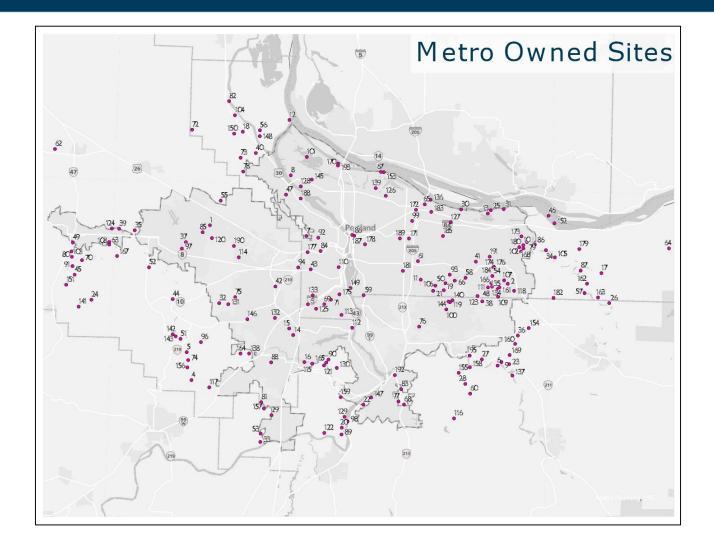
- More emergency services such as street outreach and shelter
 - More staff reaching people outside
 - Behavioral health street and shelter partnerships
 - Safe rest/park sites, tiny villages, motel shelters, congregate...
- More staff to reach people experiencing homelessness and help them move into housing
- More dollars for rent assistance: prevention and post-placement
- Advocacy and case management
- Services in the areas of mental health, physical health, language and culture needs, education, employment, addiction and recovery, tenant rights and others.





PART 3: STAFF RECOMMENDATIONS

Metro owned sites



Staff recommendations

Recommendation	Responsible
 Improve understanding of regional homeless system inflow and outflow. Support efforts underway between jurisdictions and national data analysis experts to improve data quality and use it to manage inflow and outflow Provide quarterly progress updates and a report on whether winter strategies have had an impact 	Metro Staff & Council
 Reaffirm current LIP safety on and off the streets measures and efforts to stand up 900+ beds of shelter this year Counties committed to doing as much as they can within parameters of their LIP, in some cases exceeding their first-year goals for shelter expansion. 	Metro Staff & Council
Leverage future Tri-County Planning Body to address the regionalization of data practices, such as improving inflow and outflow data analysis.	Metro Staff & Council
 Conduct Metro "site development" process in cooperation with COO and Metro staff to respond to Council's request. Request site development proposal for consideration by Metro Council that includes scope, cost, FTE capacity and completion timeline. 	Council to work with COO, department directors and OMA



"Creating a **coordinated system** that operates from the position of a **Housing First approach**, removing barriers to entry and based on the needs of each individual person and family, is key [to ending homelessness]"

-United States Interagency Council on Homelessness