



Metro

600 NE Grand Ave.  
Portland, OR 97232-2736

# Agenda

Meeting: Housing Bond Oversight Committee Meeting  
Date: Wednesday, Dec. 7, 2022  
Time: 9:30 a.m. to 11:30 a.m.  
Place: Virtual meeting ([Zoom link](#))  
Purpose: Share the project pipeline data to date, revisit post-completion reporting data and what's to come, sharing equitable lease up strategies and future planning, update on 2023 calendar and member changes.

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9:30 a.m. Welcome and introductions  
9:45 a.m. Conflict of interest declaration  
9:50 a.m. Public comment  
10:00 a.m. Presentation and discussion: pipeline analysis  
10:35 a.m. Break  
10:40 a.m. Presentation and discussion: project outcomes reporting and evaluation framework  
11:10 a.m. Committee member changes  
11:20 a.m. Next steps and 2023 committee meeting calendar  
11:30 a.m. Adjourn

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

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## Meeting Summary

Meeting: Housing Bond Oversight Committee Meeting  
Date/time: Wednesday, November 9, 2022, 9:30 AM – 11:30 AM  
Place: Virtual meeting (Zoom)  
Purpose: Quarterly progress and financial updates; follow up on Private Activity Bonds (PAB), Rapid Permanent Supportive Housing (PSH) Funding Allocation, and update on state and federal policy

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### Attendees

Kira Cador (she/her), Brandon Culbertson (he/him), Melissa Erlbaum (she/her), Co-chair Jenny Lee (she/her), Ann Leenstra (she/her), Mara Romero (she/her), Co-chair Steve Rudman (he/him), Andrea Sanchez (she/her), Karen Shawcross (she/her), Nicole Stingham (she/her), Trinh Tran (he/him), Juan Ugarte Ahumada (he/him)

### Absent

Mitch Hornecker (he/him), Tia Vonil (she/her)

### Metro

Ash Elverfeld (they/she), Liam Frost (he/him), Jenna Jones (she/her), Rachael Lembo (she/her), Emily Lieb (she/her), Jimmy Oporta (he/him), Patricia Rojas (she/her)

### Facilitator

Ben Duncan (he/him)

*Note: The meeting was recorded via Zoom and therefore details will be focused mainly on the discussions, with less detail in regards to the presentations. Presentation slides are included in the archived meeting packet.*

### Welcome and introductions

Co-chairs Steve Rudman and Jenny Lee welcomed the Committee to the meeting and introduced Ben Duncan as a neutral third-party facilitator.

Members approved the meeting summary from May 25, 2022.

Ben facilitated introductions between members.

### Director updates

Patricia Rojas, Regional Housing Director, Metro, provided updates. In October, Marisa Madrigal, Chief Operating Officer (COO), added a new deputy COO position for Metro. Over the past four years, Metro housing work has grown in complexity and scale requiring additional staffing and capacity to meet the needs of Supportive Housing Services (SHS) and the Affordable Housing Bond. The Housing Bond and SHS Teams will be moved out of the Planning, Research and Development Department and will be established as Metro's Housing Department.

## Meeting Summary

Metro Council approved four new Full Time Employees (FTE) in adopted budget and an additional four FTE in the September budget amendment. The first position of eight positions has been filled, Liam Frost as Regional Housing Assistant Director. Liam introduced himself and shared his excitement to join the team.

### Public comment

No public comment received.

### Presentation and discussion: Production progress, financial report, and updates on private activity bonds and other state funding alignment

Emily Lieb, Affordable Housing Program Manager, Metro, provided a presentation on the third quarter implementation progress. Jimmy Oporta, Housing Analyst, Metro, started the presentation with the Production Progress Report highlighting the construction status of affordable housing units within the region.

Emily provided active funding solicitation updates. Four partners have active solicitations accounting to 60 million dollars in funding. Metro currently has 56% of funds committed to projects and expects that all remaining funds will be committed by 2024. She reminded the group that the email newsletter provides regular updates and highlights of program successes. Emily also covered Home Forward's Troutdale project timeline and plan. The project will potentially experience some delays due to denials of requested variances by the Troutdale Planning Commission. Home Forward hopes to reach negotiated agreement with the Commission soon.

Karen Shawcross asked if post occupancy data can be viewed and if Metro has changed the 90-day requirement for reporting.

*Emily responded that Post Occupancy Report preliminary data has been received and is being analyzed. The current plan is to bring any data to the Oversight Committee as part of the Annual Report. Metro is working on getting summary data while being sensitive to privacy needs. However, there needs to be additional work conducted by Metro staff level to appropriately process data.*

*Jimmy added that the lease-up period is taking longer than normal. Property managers responsible for processing applications are reporting longer times than originally anticipated and are asking for patience. The 90-day requirement begins when lease up is 95% occupancy.*

Karen commented that post occupancy data is important, and it ensures that housing goes to people it is intended to. She asked if it would be possible to share raw data with the Committee as it comes in instead of waiting for the summary report.

*Emily replied that tenant demographic data needs to be mined for privacy concerns, but Metro is working to share data as quickly as possible.*

Kira asked if general contractors (GC) and developers report actual COBID numbers six months after Certificate of Occupancy.

*Jimmy replied that numbers will be received six months after Temporary Certificate of Occupancy. This timeline to allows the GC to provide information in terms of COBID contracts.*

## Meeting Summary

Kira followed up to ask how COBID applications are verified if information is not provided until after completion.

*Emily responded that Metro receives data once, post-completion. The structure is not set up to capture real-time performance, but rather a look-back at the outcomes for the Committee to ensure accountability and track progress.*

Andrea Sanchez stated that the delay of lease-up on projects can be a huge risk in terms of meeting stabilization requirements and permanent financing. She asked if the Committee should understand the rationale behind the delayed lease-up.

*Jimmy replied that it is an issue of capacity, having someone collect paperwork and put applicant through the lease-up process involves multiple steps. Usually there is only one site manager responsible for screening, moving tenants, and providing Metro with reporting and summary numbers. This can be a challenging ask for one staff person.*

Andrea suggested that there should be adequate protections and necessary capacity clauses in lease-up budgets.

Karen noted the important comments that Kira and Andrea made and suggested the consideration of some intervention and some budget additions. She is concerned about property management companies that are inexperienced in leasing affordable units. The inability to look at data in real time hinders the oversight function of the Committee.

*Emily stated that it could be helpful for staff to come back to the post occupancy timeline and reporting in December.*

Emily continued with her presentation on private activity bonds (PABs) and other state funding alignment. In August, the Oregon Housing and Community Services (OHCS) came out with a plan that was informed by key stakeholder engagement from housing authorities, jurisdictions, and developers to coordinate project pipelines for 4% low-income tax credit, which requires PABs. Last fall, OHCS paused applications for the 4% tax credit as the State had over committed allocations. The State has also dedicated 35 million of HTF/LIFT funding for Metro bond projects.

Andrea asked if the RFPs mentioned earlier in the presentation are solely funded from Metro bonds or a combination of other sources.

*Emily replied that the slide highlighted Metro bond funds that are out for solicitation. In some cases, there are additional resources. Portland also has tax increment funding (TIF) funding for solicitation.*

Steve asked if Multnomah County Commissioners or Metro could weigh in on the Troutdale situation.

*Emily affirmed that Metro staff and the district Councilor are closely monitoring the situation.*

*Liam Frost (he/him) added that Commissioner Stegman and staff have been heavily involved in negotiations and working with Troutdale counterparts.*

## Meeting Summary

### Presentation and discussion: \$20 million allocation for Rapid PSH investments

Patricia presented on the \$20 million for rapid PSH investments. Metro has established a framework that incorporates lessons learned from local and national turnkey initiatives to ensure sound stewardship of public dollars. The model allows the three counties to partner and leverage shared resources. Metro will continue to work with partners to identify and support continued PSH and SHS integration.

Emily noted that funding must be used to invest in properties that will leverage SHS resources for rental assistance, provide wrap-around services, and serve Population A. Funds are prioritized for acquisition-based models that can support interim shelter use but also support long term PSH. Counties will submit sites to Metro by April 2023.

Brandon asked about the community engagement process regarding funding allocation. He highlighted the importance that local businesses are included in the process along with the community itself if selected sites are in historically underserved areas. He also noted that the Oregon Mayors Association (OMA) plan for 123.5 million dollars has not been proposed to the legislature yet and is concerned that there will be a scramble for preexisting buildings and sites. He suggested that there should be an integration of revenue streams to avoid duplication of services.

*Patricia replied that for any kind of development-oriented project, every county does some level of community engagement. The program is acquisition-based, so it is not limited to a certain type building and the county can tailor it to the community that they are serving. The value of the program is rooted in best practices so it's on-going body of work. She noted that the integration of funds is a possibility.*

Jenna Jones, State and Regional Affairs Advisor, Metro, stated the OMA letter that was released did not have input from the counties. Last legislative cycle, there was a pilot project where cities and counties paired funding and capital investments, requiring partnership. There will be a response to the OMA letter.

Steve commented that the term “rapid” might not be correct. When this topic was discussed a year ago, it was with a need to provide immediate shelter, and while the creation of long-term permanent housing is important, expediency in creating immediate solutions is integral.

*Patricia replied by expressing appreciation for highlighting what it looks like to respond with urgency. It is also important to try to be responsive and do something on an urgent track and meet requirements of the Bond. It's the permanent housing requirements that make it a little complicated, along with ensuring that there are sustainable operations.*

Kira asked if SHS is a funding source that goes to support resident services that are required in projects being developed under PSH.

*Patricia replied that PSH requires intensive case management focused on supporting populations facing long-term homelessness with one or more disabilities. SHS will provide regional long term rent assistance.*

Nicole Stingh added that OHCS was not administrator of a project turnkey but rather Oregon Community Foundation as it is easier for them to disseminate funds as they are a private entity. She noted this is “rapid” for new government funding.

## Meeting Summary

### Presentation and discussion: State and federal policy

Jenna noted that the election will impact legislation and the hope is for housing to be a priority for the next governor. Metro Council has endorsed supporting legislature that increases the proportion of PABs directly to OHCS and reduces technical barriers regarding PABs. Jenna gave updates on other Oregon State policies that relate to housing.

Nicole shared the OHCS submitted their agency request budget which includes historic requests for housing. See snapshot: <https://www.oregon.gov/ohcs/about-us/Documents/ARB%20Summary%209.2.22.pdf>

### Next steps

At the December 7, 2022 meeting the Committee will discuss post occupancy data landscape and opportunities for improvement and the 2023 planning calendar.

Karen commented that zero dollars have been committed from the Metro Site Acquisition Program and requested an update at the next meeting.

*Emily replied that the Council will be receiving a Site Acquisition Program update on November 10. She noted that a majority of those funds have been earmarked for projects.*

*Rachael Lembo added that site acquisition commitments have been reflected in the jurisdiction line rather than the site acquisition line. Metro will revise those numbers for next quarter's report.*

Kira asked when jurisdictions will complete their spend down forecasting reporting.

*Emily replied that all jurisdictions have planned their spend down and their forecasts are based on their plans to issue solicitations that will include unit numbers and specific goals. Metro will complete some forecasting work to ensure consistency in assumptions and also convey expected occupancy.*

### Adjourn

Meeting adjourned at 11:30 a.m.



# Metro

## Affordable Housing Program

### Contracting and Workforce Reporting

*Metro's Housing Bond Program Work Plan requires that implementing jurisdictions utilized strategies or policies, such as goals or competitive criteria related to diversity in contracting or hiring practices, to increase economic opportunities for people of color. Local implementation partners are required to submit this completed form to Metro within three months of construction completion (defined as three months following final payment to all prime and sub-contractors).*

*On the following pages, please fill in your project's data. Green cells in the data tables are not editable and will auto-calculate as other data is entered.*



## COBID Outreach Summary

*In the space below, please describe the COBID-certified subcontractor outreach efforts and elaborate on the lessons learned that can be applied for future projects (min. 200/max. 500 words)*



**WORKFORCE OUTCOMES**

The following outcomes should be reported at the end of project's construction by the general contractor of the project, if project workforce tracking is a requirement in the funding agreement

**a. Total hours worked by project workforce\***

Total	0
*Includes all reported hours worked by anyone (apprentice and non-apprentice)	

**b. Project goals and outcomes**

	Goal	Outcome
Percentage of Total hours worked by Apprentices		
Percentage of Total hours worked by Women		
Percentage of Total hours worked by People of Color		

Apprentice Only	BIPOC					Non-BIPOC or Unknown		Total BIPOC Hours	Total Apprentice Hours
	American Indian	Asian	Black	Hispanic	BIPOC Other	White	Race/Ethnicity unknown		
Male								0	0
Female								0	0
Non-Binary/Other								0	0
Unknown								0	0
Subtotal	0	0	0	0	0	0	0	0	0

Non-Apprentice Only	BIPOC					Non-BIPOC or Unknown		Total BIPOC Hours	Total Non-Apprentice Hours
	American Indian	Asian	Black	Hispanic	BIPOC Other	White	Race/Ethnicity unknown		
Male								0	0
Female								0	0
Non-Binary/Other								0	0
Unknown								0	0
Subtotal	0	0	0	0	0	0	0	0	0

**Summary Tables**

**d. Number and % of hours worked by apprentices, People of Color and Women - disaggregated by Race**

	American Indian	Asian	Black	Hispanic	BIPOC Other	White	Race Ethnicity unknown	Total Hours worked	Percentage of Total Hours Worked
Hours worked by apprentices	0	0	0	0	0	0	0	0	
Hours worked by People of Color	0	0	0	0	0	0	0	0	
Hours worked by Women	0	0	0	0	0	0	0	0	

**c. Number and % of hours worked by apprentices, disaggregated by Gender**

	Female	Male	Non-binary	Total Hours worked	Percentage of Total Hours Worked
Hours worked by apprentices	0	0	0	0	



## Initial occupancy demographics, application and screening outcomes, and affirmative marketing outcomes

*The Metro Affordable Housing Bond Program Work Plan requires implementing jurisdictions to ensure fair housing strategies for “eliminating barriers in accessing housing for communities of color and other historically marginalized communities, including people with low incomes, seniors and people with disabilities, people with limited English proficiency, immigrants and refugees, and people who have experienced or are experiencing housing instability.” In order to ensure accountability for these outcomes, the Work Plan requires project owners to report on voluntarily reported tenant demographics and other metrics and data related to marketing and leasing outcomes to support evaluation of program outcomes. This report must be submitted within three months of the project reaching 95% occupancy.*

Implementation partner information	
Partner jurisdiction Name	
Jurisdiction Staff Contact	
Contact email	
Contact Phone number	

Project information	
Project name	
Project street address	
Project city	
Project zipcode	

Initial leasing management	
Name of property manager or organization managing initial leasing	
Organization contact name	
Contact email	
Contact Phone number	

## Demographics of initial occupants and households

### A. Please complete the following tables providing aggregate numbers for all household members in regulated units

<b>Total number of initial occupants</b>	
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<b>Race/ethnicity (mutually exclusive categories)</b>	<b>Number of Occupants</b>
Non-Hispanic White	
Black, Indigenous, or Person of Color (BIPOC)	
Race/ethnicity unreported	

<b>Race/ethnicity (alone or in combination categories)</b>	<b>Number of Occupants</b>
Asian or Asian American	
Black, African American or African	
Hispanic or Latin(a)(o)(x)	
American Indian, Alaska Native or Indigenous	
Native Hawaiian or Pacific Islander	
White	

<b>Disability status</b>	<b>Number of Occupants</b>
Person with disabilities <sup>[1]</sup>	
Person without disabilities	
Disability status not provided	

<b>Age</b>	<b>Number of Occupants</b>
Number of seniors (62+)	
Number of children under 18	
Number of children under 6	

<b>Veteran</b>	<b>Number of Occupants</b>
Number of military veterans	

### B. Please complete the following tables providing aggregate number for all households in regulated units

<b>Total number of initial occupants</b>	
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<b>Household size</b>	<b>Number of Households</b>
1 occupant	
2 occupants	
3 occupants	
4 occupants	
5 occupants	
6 occupants	
7 or more occupants	

<b>Household makeup</b>	<b>Number of Households</b>
With children under 18	
With seniors (62+)	
With seniors and children under 18	
With a single parent and dependent child under 18	
With at least one household member with a disability	

## Application screening outcomes

**a. Please complete the following tables providing aggregate numbers related to applications received, processed, approved, and withdrawn for units.**

Unit type	Studio	1BR	2BR	3BR+	Total
Total units available					
Total rental applications received					

Applications by status	Count
Total applications screened	
Of the applications screened, total applications initially accepted	
Total number of appeals	
Total applications approved after appeal	
Total number of applicants that withdrew, dropped out, or stopped following up during the process	

**b. Aggregate the reasons for application denials in the following table. Please include multiple reasons for an individual applicant, if applicable:**

Reason for denial	Count
Over-income	
Under-income	
Lack of documentation	
Overhoused <sup>[1]</sup>	
Underhoused <sup>[2]</sup>	
Credit history	
Negative rental history	
Criminal background	
Lack of references	
Others:	

[1] If potential household would be living in a unit with more bedrooms than it is qualified for based on applicable occupancy standards

[2] If potential household would be living in a unit with less bedrooms than it is qualified for based on applicable occupancy standards

### c. Total accessible (Type A/ADA) units and tenant matching

Total accessible (Type A/ADA) units	
Number of tenants who requested accessible units (Type A/ADA)	
Number of tenants who requested and were matched with accessible units (Type A/ADA)	

d. Permanent supportive housing (PSH) placements	Number of households	Number of people
Number of chronically homeless households and people referred through coordinated access or local HUD Continuum of Care approved referral systems into permanent supportive housing <sup>[3]</sup>		

[3] Permanent supportive housing is housing that includes rental assistance and wraparound services, and is designated for households experiencing chronic homelessness and referred through coordinated access or local HUD Continuum of Care approved referral systems. PSH units include units with ongoing operating subsidy and services through Veterans Affairs Supportive Housing (VASH), Section 811 program for individuals with developmental disabilities, units with PSH funding from the state of Oregon, units supported through the Supportive Housing Services (SHS) program, and any other programs that provide ongoing funding to support housing stability for chronically homeless households.





Metro



# Housing Bond Community Oversight Committee

December 7, 2022



# Pipeline forecast



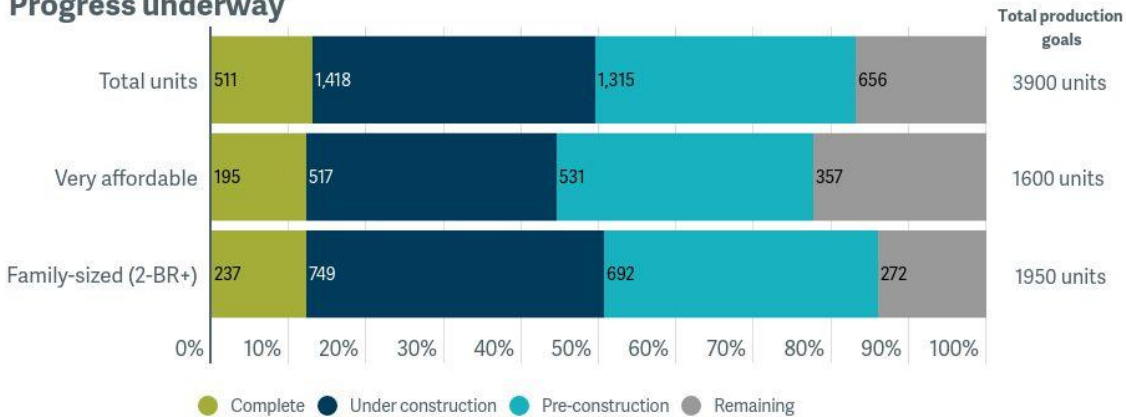
Production progress

Timeline

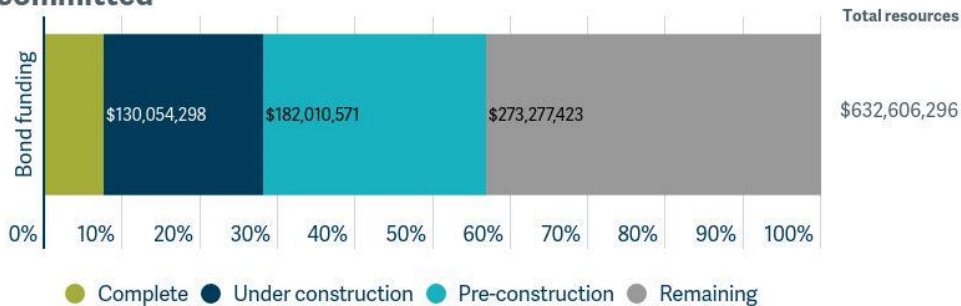
Anticipate outcomes

# Current production pipeline

## Progress underway

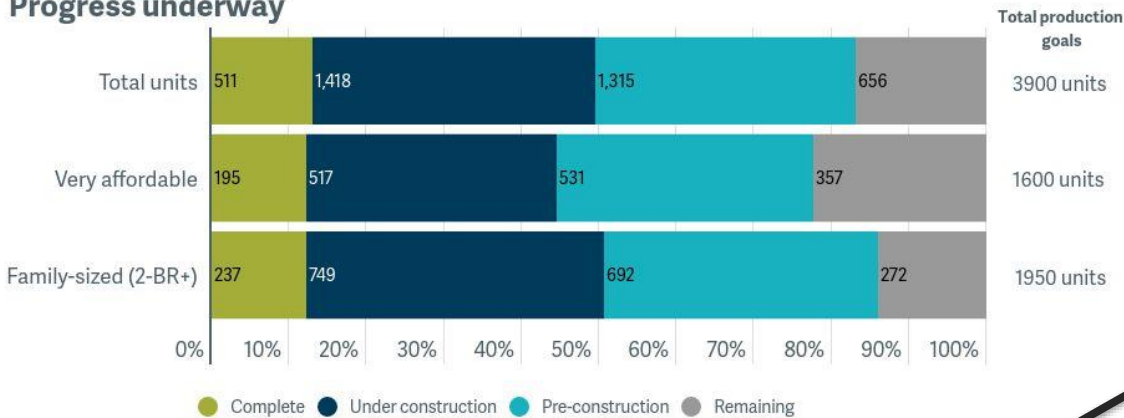


## Resources committed

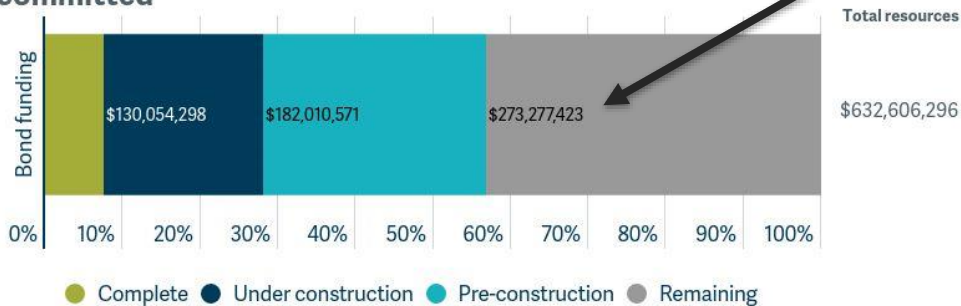


# Plans for remaining funds

## Progress underway



## Resources committed



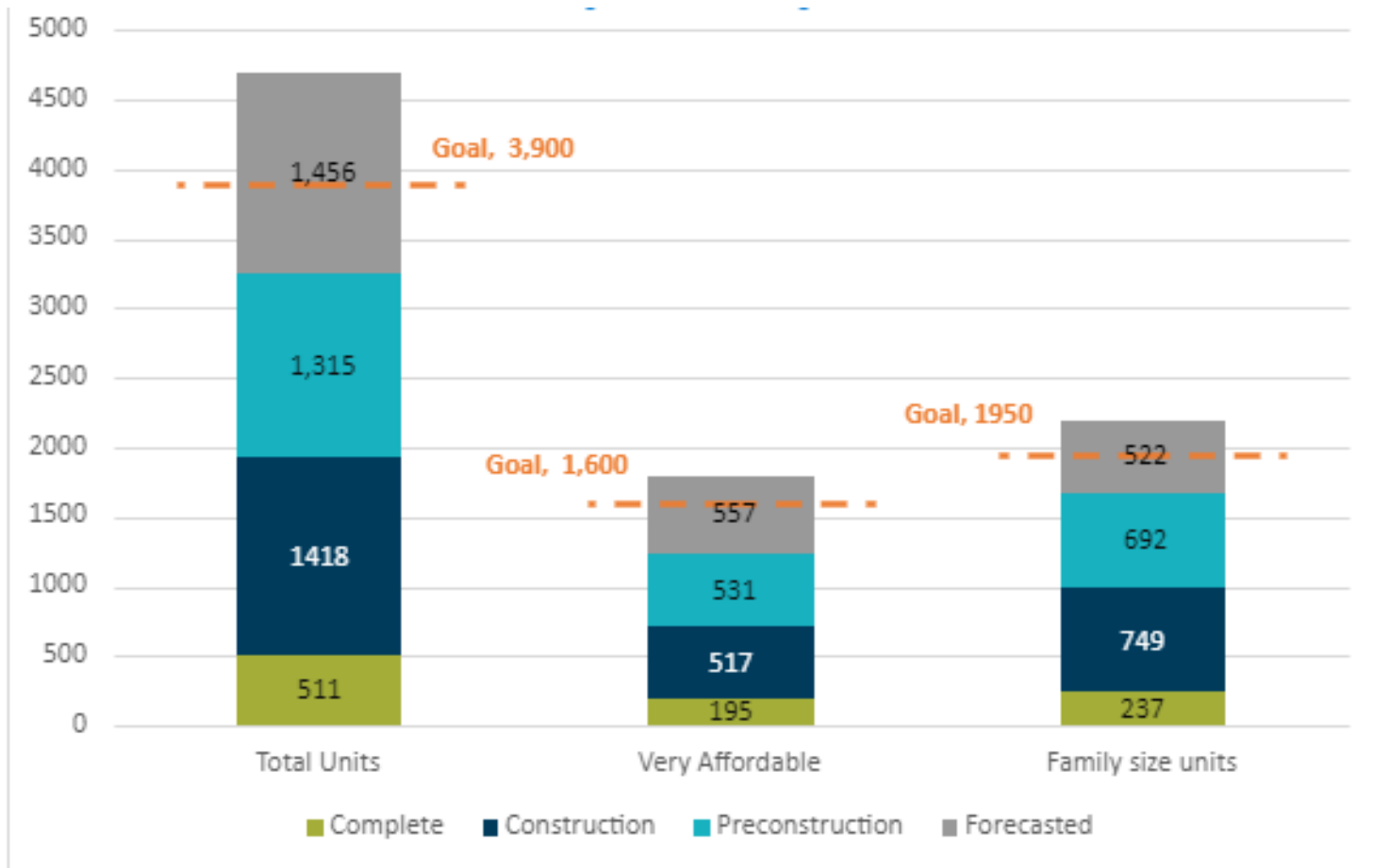
\$138M expected to be awarded in early 2023 based on fall/winter 2022/23 funding solicitations.

\$106M earmarked for large publicly owned sites (Hillside in Clackamas; Broadway Corridor in Portland).

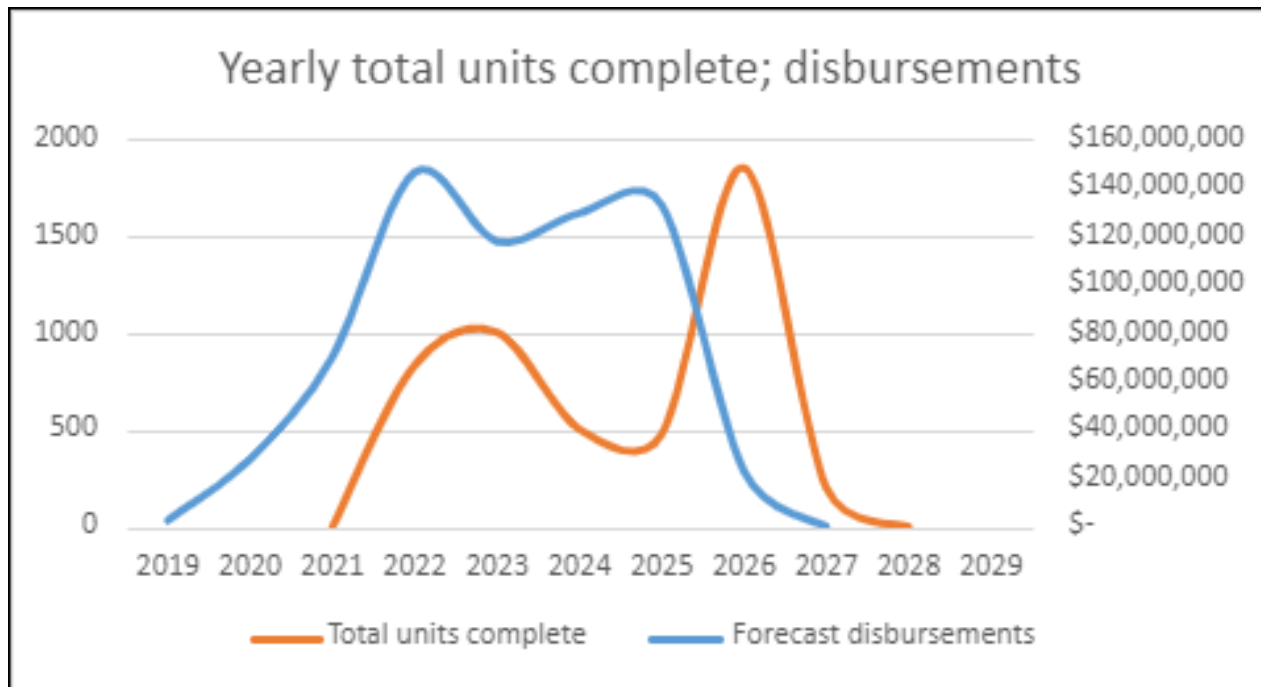
\$19M remaining for future allocation.

Does not yet reflect \$20M allocation of interest earnings for PSH.

# Forecasted production outcomes



# Timeline for Metro disbursement of funds



Typical project timeline:

Solicitation and  
predevelopment (12-  
18 months)

Construction (18-24  
months)

Lease up (6-12  
months)

# Post-completion reporting



Purpose of post-completion reporting  
Reporting metrics and requirements  
Reporting status

# Purpose of post-completion reporting

- Support oversight and accountability for evaluating program outcomes for advancing racial equity
- Analyze regional trends to inform future policy/planning
- Develop baseline data to inform future goals
- Share performance data to inform future funding decisions



# Post-construction outcomes reporting and analysis

When	Metrics	How this will be used
6 months after temporary certificate of occupancy (TCO)  <i>IGA required 3 months, but we've learned that final data is not available until 6 months after TCO</i>	Percentage and amount of construction contract dollars to COBID-certified MWESB firms, disaggregated by firm type and race/ethnicity  Percentage and total hours worked by women, people of color, and apprentices, disaggregated by race/ethnicity	Evaluation of program outcomes at the project, jurisdiction, and regional level – as part of annual report  Analysis of regional trends in equitable contracting/workforce to support planning/policy  Data about developers' track record will be shared with jurisdictions to inform future funding decisions



# Post-occupancy outcomes reporting and analysis

When reported	Metrics	How this will be used
<p>3 months after 95% occupancy</p> <p><i>IGA requirement</i></p>	<p>Voluntarily provided occupant demographics (race/ethnicity, seniors, children, veterans, disability status)</p> <p>Number of initial applicants and reasons for application denials</p> <p>Referrals from CBO partners</p> <p>Number of accessible (Type A/ADA) units and number of tenants who requested and were matched with accessible units.</p> <p>Permanent supportive housing placements</p>	<p>Evaluation of program outcomes at the project, jurisdiction, and regional level – as part of annual report</p> <p>Analysis of regional trends for fair housing access (e.g. comparison of building-level demographics to comparable Census data) to support planning/policy</p> <p>Data about developers' track record will be shared with jurisdictions to inform future funding decisions</p>

# Post-construction reporting status

Jurisdiction	Project	Construction completed	Workforce tracking commitment?	Report Due	COBID report submitted	Workforce report submitted
Portland	Findley Commons	Dec-2021	Yes	Jun-2022	Yes (incomplete)	No
Beaverton	Mary Ann	Sep-2021	Yes	Mar-2022	Yes	No
Washington	Viewfinder	Dec-2021	Yes	Jun-2022	Yes (incomplete)	No
Gresham	Rockwood Village	Apr-2022	No	Oct-2022	Yes	n/a
Gresham	Wynne Watts Commons	Jun-2022	No	Dec-2022	Yes	n/a
Clackamas	Tukwila Springs	Jun-2022	No	Dec-2022	Yes	n/a

# Post-occupancy reporting status

Jurisdiction	Project	Construction completed	95% occupancy date	Report due	Report submitted
Portland	Findley Commons	Dec-2021			Yes
Beaverton	Mary Ann	Sep-2021			Yes (incomplete)
Washington	Viewfinder	Dec-2021			No
Gresham	Rockwood Village	Apr-2022	Sep-2022	Dec-2022	Yes (incomplete)
Gresham	Wynne Watts Commons	Jun-2022	Nov-2022	Feb-2023	n/a
Clackamas	Tukwila Springs	Jun-2022			No

# Next steps

- Jurisdictional coordination and regional tools to support consistent, accurate and timely reporting on project outcomes
- Metro analysis of preliminary contracting/workforce and fair housing outcomes as part of 2022 annual report
- Local progress reports highlighting local progress and activities to support equitable outcomes
- Oversight committee review and discussion as part of 2022 annual report process

