



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Agenda

Meeting: Housing Bond Oversight Committee Meeting

Date: Wednesday, Feb. 22, 2022

Time: 9:30 a.m. to 12:00 p.m.

Place: Virtual meeting ([Zoom](#))

Purpose: Preview outcomes data and prepare for annual report process.

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| 9:30 a.m. | Welcome and introductions |
| 9:55 a.m. | Conflict of interest declaration |
| 10:00 a.m. | Public comment |
| 10:05 a.m. | Annual review process overview |
| 10:15 a.m. | Preview of equitable contracting and workforce outcomes |
| 10:40 a.m. | Break |
| 10:50 a.m. | Preview of occupancy outcomes and discussion of methodology |
| 11:25 a.m. | Questions for jurisdictions discussion |
| 11:55 a.m. | Next steps |
| 12:00 p.m. | Adjourn |

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Meeting Summary

Meeting: Housing Bond Oversight Committee Meeting
Date/time: Wednesday, December 7, 2022, 9:30 AM – 11:30 AM
Place: Virtual meeting (Zoom)
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.

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), Trinh Tran (he/him), Juan Ugarte Ahumada (he/him), Tia Vonil (she/her)

Absent

Mitch Hornecker (he/him), Karen Shawcross (she/her), Andrea Sanchez (she/her), Nicole Stingham (she/her)

Metro

Ash Elverfeld (they/she), 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.

Ben Duncan facilitated introductions between members.

Members approved the meeting summary from November 9, 2022.

Conflict of interest declaration

Melissa Erlbaum shared a potential conflict of interest.

Co-chair Lee shared a potential conflict of interest.

Public comment

No public comment received.

Presentation and discussion: pipeline analysis

Emily Lieb, Affordable Housing Program Manager, Metro, gave an update on the current production pipeline and shared what progress is underway and the amount of resources committed to future work. She also detailed the spend down of the \$273 million remaining funds. Emily announced that production is forecasted to exceed unit goals and she shared the timeline for Metro's disbursement of funds.

Co-chair Rudman acknowledged that exceeding the goal is a big deal.

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Kira Cador asked how much has been funded per unit to date to calculate the total unit forecast and what is the per unit cost of remaining units?

Emily replied that Metro can follow up with an answer. She noted that in some cases jurisdictions share what can be expected, and in others, Metro makes conservative calculations.

Presentation and discussion: project outcomes reporting and evaluation framework

Emily presented on the purpose of post-completion reporting. She noted that in February, Metro will share more information around metrics, data, and equitable lease up strategies. She said the purpose of post-completion reporting is to evaluate program outcomes for advancing equity and to analyze data trends for future planning. Emily then detailed the metrics and use of Certification Office for Business Inclusion and Diversity (COBID), workforce, and occupant data and reporting requirements.

Jimmy Oporta, Housing Analyst, Metro, shared the post-construction reporting status for six projects that have reached the COBID and workforce data reporting requirements. For the projects with incomplete or missing data, Metro has requested that data before the end of year to be included in the annual report. Jimmy noted that only three projects have shared post-occupancy data reports since it's optional. The hope is that in the future jurisdictions require post-occupancy data and share the reports with Metro.

Emily covered next steps which include fine tuning reporting requirements; a preliminary analysis on contracting, workforce, and fair housing outcomes as part of the 2022 annual report; and Committee feedback on demographic and context data.

Kira reflected that she understands the challenges with real time reporting and pointed out that for three jurisdictions there are no demographic reports on projects that have been completed for over a year. She asked why the data collection is challenging. Kira noted that if jurisdictions aren't receiving reporting data from project managers, it could be because the project lacks funding or capacity to hire.

Jimmy replied that no reporting form existed at the beginning of this effort, and it had to be developed. He noted some jurisdictions have purchased workforce data tracking software and Metro has offered jurisdictions technical assistance funding, but the root problem is capacity. Jimmy shared that of the workforce reports received, the outcomes look promising as 42% of workforce hours are going to people of color. Metro is working on fine tuning calculations and accuracy.

Kira followed up by asking if Metro could send the report examples shared with the Committee to the general contractors (GC) to fill out directly as there could be a disconnect between jurisdictions and the GC.

Emily shared that was Metro's intention but, in some cases, jurisdictions want to monitor reports closely and there have been a range of approaches. Emily stated that the jurisdictions will be attending the Committee's March meetings and can speak directly on this issue.

Melissa Erlbaum shared that reporting should be a contractual requirement.

Co-chair Rudman agreed and said that while there are inter-governmental agreements (IGAs) between Metro and jurisdictions, there are also contracts between jurisdictions and

Meeting Summary

developers/GCs. He suggested that utilizing contracts between jurisdictions and developers/GCs could be an opportunity for midcourse correction and money or assistance could be focused there.

Brandon asked if a GC tool kit could be helpful so there are professional learning opportunities if contractual accountability is not feasible. He agreed with others that it's important to create scaffolds of support.

Emily responded that they've asked jurisdictions what capacity is needed for them or their contractors. From that ask, two technical assistance grants were given; Clackamas County received data software and Washington County with LatinoBuilt helped firms navigate through the COBID certification process. The general response was a lack of capacity among local implementation partner jurisdictions to receive funding, connected to broader challenges associated with the program's 5% Administrative Funding cap shared across jurisdictions.

Kira shared that a lesson learned would be to not issue a final payment to the GC until a final data report has been shared.

Emily noted that due to the decision to move forward quickly and with the administration funding cap, Metro's IGA with partners establish requirements for jurisdictions to collect and report on project outcomes data such as demographics, but does not provide specific direction for how these expectations are translated into the funding contracts between the local jurisdictions and developers/GCs. She shared this would be a great question to ask the jurisdictions when they attend the spring meetings.

Mara Romero reflected on the similarities of the disability justice movement and that it can be hard to depend on organizations to implement something unless it's a requirement or profitable. Overtime, it'll become a best practice to implement voluntarily, but until then there should be requirements.

Tia Vonil noted that tracking data is important for the Committee's values to lead with equity and that making recommendations doesn't always lead to result. The recommendation must be built into an accountability structure. Workforce and occupancy data are important and there is no guarantee that this years data can be recovered, which is a missed equity opportunity.

Kira shared that from a private developer perspective, they require the GC to report data monthly and there must be a final data report before final payment is given.

Mara stated that getting real time data would allow the Committee to understand what next steps should be and would build trust with jurisdictions.

Co-chair Rudman sensed that this issue is important for the Committee and that there is a need to be accountable for dollars publicly. He noted that the IGAs may not reference this requirement and recalled that there is a 1% contingency fund that could be used for this topic. Co-chair Rudman requested if Gresham could share more information about their model.

Patricia Rojas, Regional Housing Director, Metro, shared that Metro staff will look into what is possible with IGAs and with partners. Next steps would be to continue this conversation in February and include more voices.

Mara remembered that there was a previous conversation on the low number of COBID certified contractors.

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Emily replied that Metro hears consistently that there are issues about getting firms who qualify for COBID certification to apply.

Jimmy noted that the Committee discussed this a year ago and noted that a consistent theme is the limited pool of Black, Indigenous, and People of Color (BIPOC) firms and workers. Many minority owned businesses shy away from the COBID certification process. Washington County has asked about ushering businesses through the process, but the real issue lies in increasing the BIPOC trade workforce.

Co-chair Rudman shared that a previous committee member, Manuel Castaneda, was specific on how difficult the COBID certification process was. There is a need to have another bond on building capacity and making the COBID certification process easier. He noted that these are systemic issues and it's important to lead with racial equity.

Co-chair Lee noted that Nicole Stingh wasn't able to make it today and wondered if the State was tracking this issue and identifying advocates.

Tia shared that there are not enough COBID certified firms in general and the best way to increase that number is to pay prevailing wages. She shared her experience with prevailing wage work and how it increases opportunities for entrepreneurship and growth.

Emily replied that Metro has been gathering and tracking prevailing wage information at both State and Federal levels and this information will be in the annual report. She noted that it's not an IGA requirement.

Co-chair Rudman reflected that it can be complicated to pay federal Davis Bacon prevailing wage for developers because it adds to project costs. He noted it's a complex problem, but Metro should consider it and that the bond could go towards funding prevailing wages.

Kira said it makes sense for prevailing wage to be included in project operations. She suggested the Committee consider project five-year cash flows and if property managers have long term support.

Patricia mentioned that it's important to rethink conversations around goals since advancing racial equity will cost money and there is a need to remove systemic barriers.

Brandon asked how data questions are being framed regarding Native American populations. He noted that percentages can be incorrectly skewed due to the way questions are asked, especially since tribal affiliation isn't race or ethnicity.

Emily replied that Metro has shared the question form for review and aligned demographic categories with those used in other Metro forms.

Ben reflected that it doesn't sound like Metro is collecting tribal affiliation data.

Brandon shared that tracking tribal affiliation will be beneficial when looking at culturally significant numbers and that it's important to demonstrate services provided. He also suggested tracking languages spoken.

Ben noted that it's important to be mindful about data gathering as sometimes the way data is collected can make some categories invisible.

Meeting Summary

Ben reflected on the discussion as a whole and transitioned to the next agenda item.

Committee member changes

Ash Elverfeld, Housing Program Assistant, Metro, announced that three committee members, Melissa, Tia, and Mitch Hornecker will complete their service in January.

Councilor Christine Lewis extended thanks and appreciation on behalf of Metro to Melissa, Tia, and Mitch's work on the Committee.

Co-Chairs Rudman and Lee shared their gratitude for the expertise and insight Melissa, Tia, and Mitch brought to the committee.

Tia and Melissa thanked everyone for their kind words and shared they are excited to leave the Committee while it's on track to exceed goals.

Mara asked how the recruitment process for new members is moving forward.

Ash replied that Metro is focusing on recruitment in the Clackamas County based on a review of committee makeup that showed a lack of geographic representation from there and that a targeted recruitment is underway.

Next steps and 2023 committee meeting calendar

Ash detailed the 2023 calendar.

Co-chair Rudman thanked everyone for the great meeting.

Next steps include:

- Metro sharing the forecasted per unit pipeline calculations.
- Metro researching what is possible for data reporting accountability with IGAs and partners.
- The Committee continuing the outcomes reporting discussion in February and having the jurisdictions available for questions in spring.

Adjourn

Meeting adjourned at 11:30 a.m.

METRO HOUSING BOND QUARTERLY REPORT | OCTOBER – DECEMBER 2022

January 19, 2023

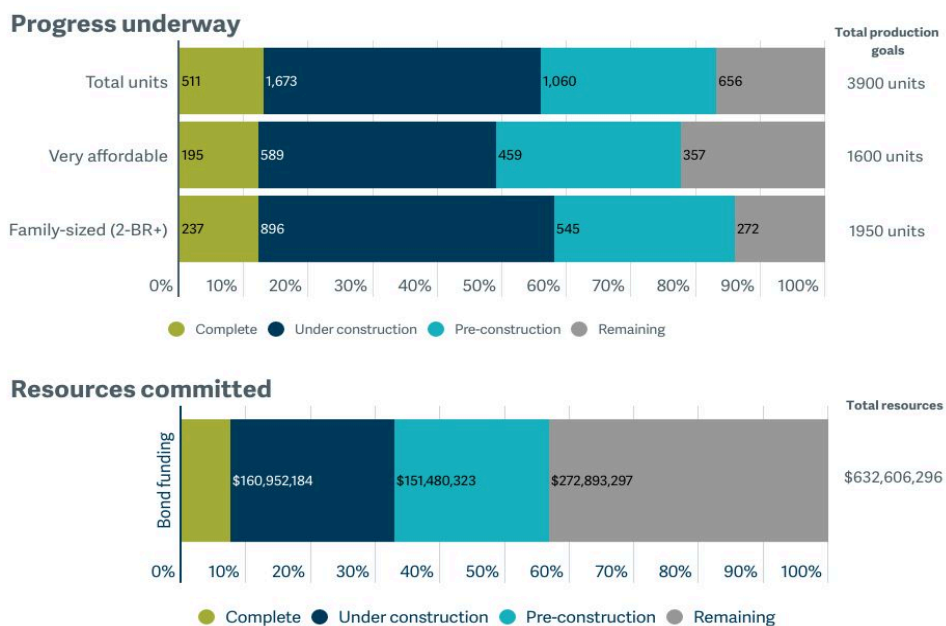
This is the fourth quarterly progress report for the Metro Affordable Housing Bond of 2022. Similar reports are produced quarterly with the goal of keeping the Housing Bond Community Oversight Committee, Metro Council, and other stakeholders and partners informed about ongoing implementation progress. A more detailed report will be provided annually for each calendar year, following submission of local progress reports by each participating implementation jurisdiction.

REGIONAL PRODUCTION PROGRESS

As of the end of December 2022, the Affordable Housing Bond program has 34 projects representing 3,244 new affordable homes in the pipeline, including ten projects (1,060 units) that are in pre-construction. Twenty-five projects have received final approval, of which seventeen (1,673 units) are under construction, and seven projects (511 units) have completed construction and are accepting residents. Of these homes, 1,679 will have two or more bedrooms, representing 86% of the program’s production goal of 1,950 family-sized homes; and 1,242 will be affordable to households with incomes at or below 30% of area median income (AMI), representing 77% of the program’s production goal of 1,600 deeply affordable homes. Collectively, the 34 projects in the pipeline represent 3,244 new affordable homes, or 83% of the total production target for the Housing Bond, while utilizing approximately 56% of allocated project funding.

Of the remaining funding, over \$138 million is expected to be awarded in early 2023 for solicitations that closed in the fall of 2022. Another \$106 million has been earmarked for the development of two large publicly owned sites in Clackamas County and Portland. The remaining balance of \$28 million is expected to be committed to other Housing Bond projects by the end of 2023.

Production and funding dashboard



REGIONAL PRODUCTION PROGRESS

	Eligible units	30% AMI units	2+ BR units	PSH units
Total units in pipeline	3,244	1,242	1,679	595
Total unit production targets	3,900	1,600	1,950	N/A
% of unit progress underway	83.2%	77.7%	86.1%	N/A
Total funding committed or underway	\$359,712,999			
% of funding committed	56.9%			
Total funding remaining	\$272,893,297			

LOCAL PRODUCTION PROGRESS

Portland

Name	Metro Bond Funds	Status	Eligible units	30% AMI units	2+ BR units	PSH units	Construction Start	Anticipated Completion
Hattie Redmond	\$4,411,737	Construction	60	60	0	60	Oct-2021	Nov-2022
Dekum Court*	<i>see Home Forward</i>	Pre-construction	147	61	78	0	Apr-2022	Jan-2025
Findley Commons	\$1,945,175	Complete	35	0	0	35	Oct-2020	Dec-2021
Waterleaf	\$1,929,219	Construction	176	17	48	20	Dec-2020	Nov-2022
74th and Glisan	\$7,972,500	Pre-construction	137	56	63	41	Feb-2023	May-2024
5020 N Interstate	\$9,216,838	Construction	63	17	48	0	Jul-2022	Jan-2024
Albina One	\$13,572,107	Pre-construction	94	32	54	0	Mar-2023	Feb-2025
Meridian Gardens	\$12,435,416	Pre-construction	85	70	0	65	Feb-2023	Feb-2024
Hollywood Hub	\$29,084,328	Pre-construction	199	69	129	0	Nov-2023	May-2025
PCC Killingsworth	\$2,538,237	Pre-construction	84	28	60	0	Jun-2023	Aug-2024
Tistilal Village	\$3,511,176	Pre-construction	24	24	22	16	Jan-2023	May-2024
Powellhurst Place	\$4,091,048	Construction	64	12	45	0	Aug-2022	Nov-2023
Total units in pipeline			1,168	446	547	237		
Total unit production targets			1,475	605	737	300		
% of commitment complete			79.1%	73.7%	74.2%	79%		
Total committed or underway				\$90,707,781				
Total LIS funding				\$197,490,792				
% of funding committed				45.93%				
Remaining LIS funding				\$106,783,011				

*Home Forward is the developer of Dekum Court, but the units will count toward Portland's production goals. Dekum Court's funding was allocated directly to Home Forward, based on an agreement between Portland, Home Forward, and Metro prior to the execution of IGAs allocating funds, and as part of Metro's early commitment of funding to four "Phase I projects" (also including Viewfinder, Mary Ann, and Tukwila Springs).

Washington County

Name	Metro Bond Funds	Status	Eligible Units	30% AMI units	2+ BR units	PSH units	Construction Start	Anticipated Completion
Aloha Family Housing	\$10,230,000	Construction	81	33	50	0	Apr-2022	Apr-2023
Aloha Quality Inn	\$9,283,000	Construction	54	54	0	54	Dec-2021	Aug-2022
Plambeck Gardens	\$14,320,000	Pre-construction	116	47	60	8	Mar-2023	Jun-2024
Goldcrest	\$12,000,000	Construction	74	14	45	0	Sep-2022	Mar-2024
Plaza Los Amigos	\$13,670,523	Construction	113	26	73	16	Jul-2022	Sep-2023
Saltzman Road	\$5,400,000	Construction	54	28	9	24	Jun-2022	Aug-2023
Terrace Glen	\$17,484,000	Construction	144	51	74	3	Nov-2021	May-2023
The Valfre at Avenida 26	\$3,792,088	Construction	36	8	30	8	Jul-2021	Sep-2022
Tigard Senior	\$6,270,000	Construction	57	23	0	23	Jul-2022	Sep-2023
Viewfinder	\$11,583,000	Complete	81	34	56	27	Jun-2020	Dec-2021
Total units in pipeline			810	318	397	163		
Total unit production targets			814	334	407	100		
% of commitment complete			99.5%	95.2%	97.2%	N/A		
Total committed or underway			\$104,032,611					
Total LIS funding			\$118,135,532					
% of funding committed			88%					
Remaining LIS funding			\$14,102,921					

Clackamas County

Name	Metro Bond Funds	Status	Eligible units	30% AMI units	2+ BR units	PSH units	Construction Start	Anticipated Completion
Fuller Road Station	\$8,570,000	Complete	99	25	82	25	Apr-2021	Sep-2022
Good Shepherd Village	\$18,330,000	Construction	142	58	79	35	Mar-2022	Aug-2023
Maple Apartments	\$15,903,000	Construction	171	70	129	9	May-2022	Dec-2023
Tukwila Springs	\$5,548,542	Complete	48	48	0	48	Jun-2021	Jun-2022
Marylhurst Commons	\$3,000,000	Construction	100	40	83	40	Sep-2022	Jan-2024
Total units in pipeline			560	241	373	157		
Total unit production targets			812	333	406	0		
% of commitment complete			68.9%	72.3%	91.8%	N/A		
Total committed or underway			\$51,351,542					
Total LIS funding			\$117,854,094					
% of funding committed			43.5%					
Remaining LIS funding			\$66,502,552					

Hillsboro

Name	Metro Bond Funds	Status	Eligible units	30% AMI units	2+ BR units	PSH units	Construction Start	Anticipated Completion
Nueva Esperanza	\$16,940,731	Construction	149	60	105	8	Mar-2022	Oct-2023
Total units in pipeline			149	60	105	8		
Total unit production targets			284	117	142	0		
% of commitment complete			52.4%	51.2%	74%	N/A		
Total committed or underway			\$16,940,731					
Total LIS funding			\$41,240,081					
% of funding committed			41%					
Remaining LIS funding			\$24,299,350					

Gresham

Name	Metro Bond Funds	Status	Eligible units	30% AMI units	2+ BR units	PSH units	Construction Start	Anticipated Completion
Albertina Kerr	\$11,292,447.42	Complete	147	30	31	30	Jan-2021	Jun-2022
Rockwood Village	\$5,237,813.69	Complete	47	47	39	0	Jan-2020	Apr-2022
Total units in pipeline			194	77	70	30		
Total unit production targets			187	77	93	0		
% of commitment complete			104%	100%	75%	N/A		
Total committed or underway			\$16,530,261					
Total LIS funding			\$27,140,995					
% of funding committed			61%					
Remaining LIS funding			\$10,610,734					

Beaverton

Name	Metro Bond Funds	Status	Eligible units	30% AMI units	2+ BR units	PSH units	Construction Start	Anticipated Completion
Mary Ann	\$3,000,000	Complete	54	11	29	0	Jun-2020	Sep-2021
Elmonica	\$8,439,934	Pre-construction	80	33	32	0	Jan-2023	Dec-2024
Scholls Ferry Road	\$9,000,000	Construction	135	17	79	0	Jun-2022	Jan-2024
Total units in pipeline			269	61	140	0		
Total unit production targets			218	89	109	N/A		
% of commitment complete			100%	68.5%	100%	N/A		
Total committed or underway			\$20,439,934					
Total LIS funding			\$31,587,595					
% of funding committed			64.71%					
Remaining LIS funding			\$11,147,661					

Home Forward (East Multnomah County)

Name	Metro Bond Funds	Status	Eligible units	30% AMI units	2+ BR units	PSH units	Construction Start	Anticipated Completion	
Troutdale Apartments	\$13,449,238	Pre-construction	94	39	47	0	Apr-2023	Oct-2024	
Dekum Court (PHB)*	\$21,034,083	Pre-construction	<i>Counts toward PHB's unit production goals</i>					Apr-2022	Jan-2025
Total units in pipeline			94	39	47	0			
Total unit production targets			111	46	55	0			
% of commitment complete			84.6%	84.7%	85.4%	N/A			
Total committed or underway			\$34,483,321						
Total LIS funding			\$37,141,206						
% of funding committed			92.84%						
Remaining LIS funding			\$2,657,885						

*Home Forward is the developer of Dekum Court, but the units will count toward Portland's production goals. Dekum Court's funding was allocated directly to Home Forward, based on an agreement between Portland, Home Forward, and Metro prior to the execution of IGAs allocating funds, and as part of Metro's early commitment of funding to four "Phase I projects" (also including Viewfinder, Mary Ann, and Tukwila Springs).

PROJECT ENDORSEMENTS AND FINAL APPROVALS

There were no projects endorsed or approved during the fourth quarter of 2022.

METRO AFFORDABLE HOUSING BOND

Financial Report Through December 2022

FINANCIAL SUMMARY

TOTAL REVENUE	\$687,506,832
TOTAL EXPENSES and DISBURSEMENTS	\$252,013,645
TOTAL COMMITTED	\$122,547,733
TOTAL FUNDING REMAINING	\$312,945,454

REVENUE

	FY 2018 - 2022	FY 2022 - 2023	TOTAL REVENUE
Bond Proceeds	\$652,800,000		\$652,800,000
Premiums on Bonds	\$2,630,335		\$2,630,335
Interest Earnings	\$29,965,748	\$2,110,749	\$32,076,497
TOTAL REVENUE:	\$685,396,083	\$2,110,749	\$687,506,832

<--- \$8,003,000 of this additional revenue ("Premiums on Bonds" and "Interest Earnings") has been allocated to fund A/C cooling systems.

EXPENSES

PROJECTS	Prior Years Expended or Disbursed	FY2022-23 Expended or Disbursed	Committed -- Not Yet Disbursed	TOTAL EXPENDED, DISBURSED or COMMITTED	WORK PLAN FUNDING (Amended)	% of Work Plan Funding Expended, Disbursed or Committed
Jurisdiction:						
Beaverton	\$12,000,000	\$0	\$8,439,934	\$20,439,934	\$31,587,595	64.71%
Clackamas County	\$48,351,542	\$3,000,000	\$0	\$51,351,542	\$117,854,094	43.57%
Gresham	\$16,341,505	\$188,756	\$0	\$16,530,261	\$27,140,995	60.91%
Hillsboro	\$16,940,731	\$0	\$0	\$16,940,731	\$41,240,081	41.08%
Home Forward (East Multnomah Co.)	\$21,034,083	\$0	\$13,449,238	\$34,483,321	\$37,141,206	92.84%
Portland	\$8,096,131	\$13,497,886	\$69,113,764	\$90,707,781	\$197,490,792	45.93%
Washington County	\$76,894,611	\$12,818,000	\$14,320,000	\$104,032,611	\$118,135,532	88.06%
Metro Site Acquisition Program	\$7,656,656	\$241,850	\$17,224,797	\$25,123,303	\$62,016,000	40.51%
Other Metro Direct Project Costs	\$71,131	\$32,383	\$0	\$103,514	\$0	N/A
TOTAL:	\$207,386,390	\$29,778,876	\$122,547,733	\$359,712,999	\$ 632,606,296	56.86%

ADMINISTRATIVE	Prior Years Expended or Disbursed	FY2022-23 Expended or Disbursed	TOTAL EXPENDED or DISBURSED	WORK PLAN FUNDING (Amended)	% of Work Plan Funding Expended or Disbursed
Jurisdiction:					
Beaverton	\$454,134	\$0	\$454,134	\$655,591	69.27%
Clackamas County	\$1,467,639	\$244,607	\$1,712,246	\$2,446,065	70.00%
Gresham	\$309,817	\$140,826	\$450,643	\$563,305	80.00%
Hillsboro	\$513,564	\$171,188	\$684,752	\$855,939	80.00%
Home Forward (East Multnomah Co.)	\$334,297	\$0	\$334,297	\$334,297	100.00%
Portland*	\$0	\$0	\$0	\$0	N/A
Washington County	\$1,414,140	\$345,450	\$1,759,590	\$2,451,906	71.76%
Metro Site Acquisition Program**	\$0	\$0	\$0	\$1,305,600	N/A
Metro Accountability and Financial Transaction Costs	\$7,740,373	\$1,712,345	\$9,452,718	\$13,056,000	72.40%
Reserved for Future Allocations				\$6,528,000	0.00%
TOTAL:	\$12,233,964	\$2,614,416	\$14,848,380	\$28,196,704	52.66%

* PHB uses a Project Delivery Fee, not paid for by Metro's Affordable Housing Bond, to reimburse their administrative expenses.

** Metro's Finance and Regulatory Services has determined that the direct costs of Metro's Site Acquisition Program are considered Project expenses. Administrative expenses in support of Metro's Site Acquisition Program are combined with Metro's total Administrative expenses and included in "Metro Accountability and Financial Transaction Costs."

Affordable Housing Bond - Regional oversight committee

Member bios

Kira Cador

Kira Cador, raised in Portland, is the president of Rembold, a privately owned local development company. Since 1990, she has managed the development of market rate and income restricted multi-family projects throughout Oregon and California, senior housing projects in Portland metro area, and flex/office and retail projects throughout Oregon and Washington.



Prior to joining Rembold, Kira was in front office management and sales with Marriott Hotels and Resorts in Southern California and Portland. Kira has a Bachelor of Arts in Business from Washington State University. She also serves as Vice President of the KairosPDX board and is a loan committee member of Community Housing Fund in Washington County. She has served on multiple technical advisory groups related to multi-family housing development and was the Board President of Fruit and Flower Childcare Development Center, Vice President of Philanthropy for the Portland chapter of National Charity League and on other philanthropic boards. Kira is married, with two grown children and has coached youth sports. She is a passionate Trailblazers fan.

Brandon Culbertson

Brandon Culbertson is from the Northern Arapaho Nation (Wyoming) and Fort Peck Assiniboine and Sioux Tribes (Montana). He is the Native Education Development and Coordination teacher of special assignment (TOSA) for the Beaverton School District.

Currently, he serves as a Sergeant in the Oregon Army National Guard, Vice Chair of the Oregon Department of Education's American Indian/Alaska Native Education Advisory Committee, and a Five Oaks Museum Executive Board Member, and he is a recent appointee to the Governor's Racial Justice Council. In these spaces and in conjunction with community, Brandon advocates



for, elevates and amplifies Native/Indigenous/POC/marginalized and underserved community needs and concerns in a way that translates to policy change and positive outcomes for quality of life. While an undergraduate, Brandon worked through housing instability, which in turn, opened his eyes to issues that, until seen up close, go unseen by many. He got by with a little help from his friends.

Brandon currently holds an Associates of Arts in Arapaho Studies from the Wind River Tribal College and a Bachelor of Science in Anthropology/Archaeology from the University of Oregon, and he is currently near completion of a Master of Science in Teaching and Learning from Colorado State University.

Jenny Lee, Co-chair

Jenny Lee is the deputy director for the Coalition of Communities of Color.

Her recent experience includes the roles of advocacy director at the Asian Pacific American Network of Oregon (APANO), advocacy director at the Coalition of Communities of Color, and housing policy director at Neighborhood Partnerships, where she helped convene the Oregon Housing Alliance. She also served as the public policy director for Hawai'i Appleseed in Honolulu, Hawai'i. Throughout her work, Jenny has engaged in extensive coalition building, legislative advocacy, campaigns, and policy research on a range of social, economic, and racial justice issues. Her previous background includes work in disability rights, domestic violence, racial justice, and mediation, as well as a year serving as an AmeriCorps member at a SUN School in Southeast Portland. Jenny holds a J.D. from Harvard Law School and a B.A. in philosophy from the University of Oregon.



Ann Leenstra

Ann Leenstra has been a resident in the Clackamas County Housing Authority's Public Housing program since early 2016. Ann has a degree in Interior Design and worked with repair and renovation of properties for many years. She enjoys building and maintaining a sense of community. Ann is very excited about the growth opportunity for housing in Clackamas County.



Mara Romero

Mara Romero serves as lead housing advocate for Independent Living Resources which covers Multnomah, Clackamas, and Washington County. ILR operates under a philosophy of consumer control, the idea that people with disabilities are the best experts on their own needs, having crucial and valuable perspectives to contribute. Mara offers support, advocacy, and information on the attainment of housing independence from a peer viewpoint. She previously served as the community living advocate for Oregon's Protection and Advocacy organization, Disability Rights Oregon. She is personally and professionally invested in sustainably healing our housing ecosystem.



Mara earned a Masters of Social Work from Portland State University and serves on the Fair Housing Advocacy Committee for Multnomah County. She has been in Oregon for almost fifteen years and currently rents on the Portland/Beaverton line with her partner, kid, and pug.

Steve Rudman, Co-chair

Steve Rudman's local public service career spans over 35 years in affordable housing and community development. He served as executive director of Home Forward (formerly Housing Authority of Portland) from 2001-2014 and as director of the City of Portland Bureau of Housing and Community Development from 1993-2001.

Steve has been an active board leader with many community organizations, including being a founding member of Portland Youthbuilders, Portland Housing Center and REACH Community Development. He attended Harvard University's John F. Kennedy School of Government as a Fannie Mae Foundation Fellow, holds a master's degree in public policy from Claremont Graduate School and a bachelor's degree from Pennsylvania State University. Steve is semi-retired and works as a part-time consultant locally and nationally. He enjoys traveling, gardening, music and baseball.



Andrea K. Sanchez

Andrea K. Sanchez believes access to safe, affordable housing improves health outcomes. As Director of Project Finance at Housing Development Center (HDC) she draws on her background operating and funding affordable housing to lead HDC's work structuring sustainable financing for affordable-housing and community-facility developments. Andrea has more than 15 years of experience in public and private real estate development. Prior to joining HDC, she served as director of housing for East Portland affordable-housing and human-service provider Human Solutions, overseeing housing development, asset management, and resident service delivery for a 700-unit housing portfolio. Andrea's public-sector experience includes leading implementation of a 10-year portfolio redevelopment and repositioning strategy with the Housing Authority of Clackamas County and administering the permanent supportive housing component of the City of Portland's 10-year plan to end homelessness. Andrea began her career in the San Francisco Bay Area working on urban renewal initiatives for a private real estate advisory firm. She holds a Master of City and Regional Planning and a Master of Public Health from University of California, Berkeley.



Karen Shawcross

Karen Shawcross has decades of experience in real estate development, property management, marketing and nonprofit work. As former Executive Director of Bienestar she managed new construction, rehabilitation and resident service programs for a portfolio of 500 affordable housing units in Washington County. At Worksystems, Inc. she directed the business and industry group, working with employers on job training, internship and outreach programs. Prior to that, she was a Senior Vice President at Bank of America for 8 years where she developed national job training and financial literacy programs in communities across the U.S. She began her career in real estate in Boston, where she worked with private firms on multifamily construction and rehab, marketing, management, and leasing training. She has served on OHCS' Agricultural Housing Facilitation Team for 15 years. A passionate advocate for affordable housing, Karen is currently retired and lives in Multnomah Village.



Nicole Stingh

Nicole Stingh works at the intersections of housing affordability and equity at Oregon Housing and Community Services, securing legislative resources and advancing the goals outlined in Oregon's Statewide Housing Plan. She brings a high-level perspective on state and federal housing policy, with a particular focus on emerging and promising practices in incentivizing housing first approaches. Nicole cares deeply about housing and believes it's foundational to the success of our region.

A resident of Beaverton, Nicole understands some of the challenges faced by her community members living with housing insecurity based on her personal experience, having faced a no-cause eviction and severe rent burden, giving her an acute understanding of her privilege as a childless white woman with housing stability now. Nicole has a bachelor's degree in political science and anthropology from the University of Oregon. Like many Oregonians, Nicole and her husband enjoy long hikes and nature walks with their dog.



Trinh Tran

Trinh Tran is a Portland attorney with eighteen years of experience in commercial transactions, real estate, and corporate law. He has advised a diverse spectrum of public and private clients on business issues ranging from routine corporate matters to complex finance and equity transactions. As deputy city attorney for the City of Portland from 2009 to 2014, Trinh advised the City and its agencies, including the Portland Housing Bureau, on complex finance projects for housing and economic development, working in partnership with non-profit entities, state and federal governments, and private funding sources.

Trinh immigrated to the United States in 1984 as a refugee and unaccompanied minor and settled in Portland. He earned his law degree, magna cum laude, from Lewis & Clark Law School and his undergraduate degree from the University of Chicago. He has served on the board of the Immigrant and Refugee Community Organization (IRCO), the Oregon Law Foundation and volunteered for Legal Aid Services of Oregon. He and his wife Melina LaMorticella live in the Rose City neighborhood in Northeast Portland.



Juan Ugarte Ahumada

Juan is the primary care clinic manager at the Virginia Garcia Wellness Center in Cornelius. Virginia Garcia is the largest nonprofit federally qualified health center in Oregon, providing comprehensive, culturally-appropriate, high-quality health care to over 48,000 individuals in Washington and Yamhill counties every year. Juan holds a Masters of Health Administration from the University of Washington and also serves on the board of directors for the Domestic Violence Resource Center in Washington County.

Juan grew up in Hillsboro and moved to Washington County at two years old as an undocumented immigrant, initially living in a station wagon and having his first meal at Centro Cultural. In his work with patients, he hears them say that above all else, safe, affordable housing is their number one need, and he wants to help make that happen.



New member, 2023: Scott Greenfield

Scott Greenfield is Senior Director of Real Estate Equity, operating under Enterprise Community Investment, and serves as national equity originator for the Enterprise Preservation Fund(s), including the Renter Wealth Creation Fund. He oversees acquisition of investments in LIHTC 15+, Section 8, public/private partnerships and affordable NOAH workforce housing. Scott brings over 20 years of experience including public finance investment banking for multifamily and single-family housing bond issuers, several leadership roles at Intel Corporation (including Intel Capital), and KinderCare Education. A resident of Clackamas County (13 years) and Washington County (11 years), he has consulted for local senior housing operators and serves on the REACH Board Advisory Committee in Portland. Scott received a MBA degree at the Olin School of Business at Washington University in St. Louis, MO and a BA degree at Colby College in Waterville, ME. Scott is passionate about preserving affordable housing, and seeking creative ways to further impact with funding sources for lasting impact in our community.



New member, 2023: Willie Poinsette

Willie Poinsette is a long-time teacher, school principal and 36-year resident of Lake Oswego. She co-founded Respond to Racism, successfully advocating for the creation and hiring of a DEI manager at the City, and meets regularly with the mayor, city manager, school district and community organizations on issues of diversity, inclusion and racial equity.

Willie says, “People think ‘Lake Oswego: oh, you have money,’ but some of us don’t. I grew up poor, in rooming houses and low-income housing projects. I like to work in low-income areas and with people I can relate to.” Her passion is ensuring that people with similar life experiences have safe, stable housing options and other vital life opportunities.

Willie is a member of Ainsworth United Church of Christ in NE Portland, where the community is working to create low-income housing on their land. Her family includes her husband, Bruce R., and her son, Bruce A., who is active in racial and social justice in Portland.





Metro



Housing Bond Community Oversight Committee

February 22, 2023

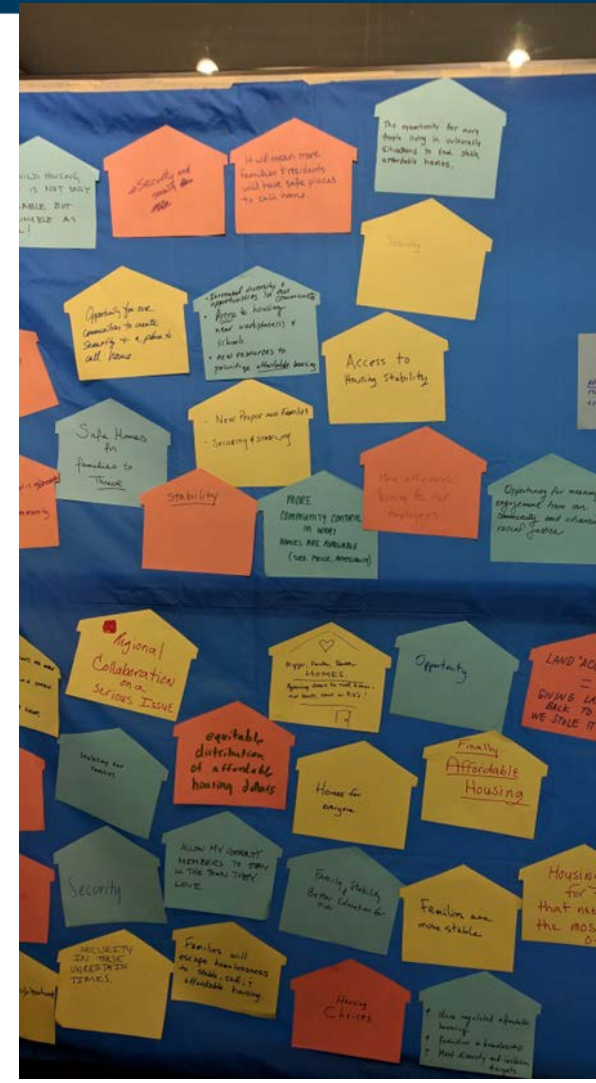
Oversight committee charge

Review and recommend implementation strategies for Council approval.

Monitor expenditures and outcomes.

Provide **annual report** and presentation to Metro Council.

Recommend implementation strategy improvements to Council as necessary.



Annual review and reporting timeline

Meeting	Time	Meeting purpose / anticipated agenda items
#1: Feb 22	9:30-12:00	-Preview outcomes data -Prepare for annual report process -Quarterly report
#2: March 8	9:30-12:30	-Implementation partner annual review conversations, 4 jurisdictions
#3: March 15	9:30-12:30	-Implementation partner annual review conversations, 4 jurisdictions
#4: Mid-April	TBD	-Regional findings presentation from Metro -Formulate preliminary findings/recommendations to inform the committee's annual report
#5: Late-April	TBD	<i>-Tentative: optional drop-in work session with Metro staff, co-chairs and facilitator to dive deeper into topic/s elevated mid-April meeting</i>
#6: Late-April	TBD	-Discuss committee findings and recommendations to Metro Council -Quarterly report
Metro Council: May TBD	TBD	-Oversight Committee annual report presentation to Metro Council

2022 committee questions to each jurisdiction

1. How are you working to ensure that your investments serve households experiencing homelessness? What opportunities are you exploring to expand SHS integration/PSH in your portfolio?
2. How are you working to ensure low barrier lease up? How are you monitoring lease up to ensure that households with barriers are served?
3. How will you make decisions about how to invest A/C funds?

Purpose of outcomes 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 provider performance data to inform future funding decisions



Preview of contracting/ workforce data



- Preview contracting and workforce data for seven projects that have reached completion
- Feedback on approach to analyzing and summarizing data
- Next steps for evaluating outcomes

Preliminary contracting / workforce outcomes



The Valfre at Avenida 26 (Forest Grove / HAWC)

DCM / LMC
36 units



Mary Ann (Beaverton)

REACH / Walsch
54 units



Rockwood Village (Gresham)

CDP / LMC
224 units, 47 bond funded units



Viewfinder (Tigard/HAWC)

CDP/Bremik
81 units



Tukwila Springs (Gladstone/HACC)

HACC/Walsh
48 units (rehabilitation)



Findley Commons (Portland)

Home First/Beaudoin
35 units



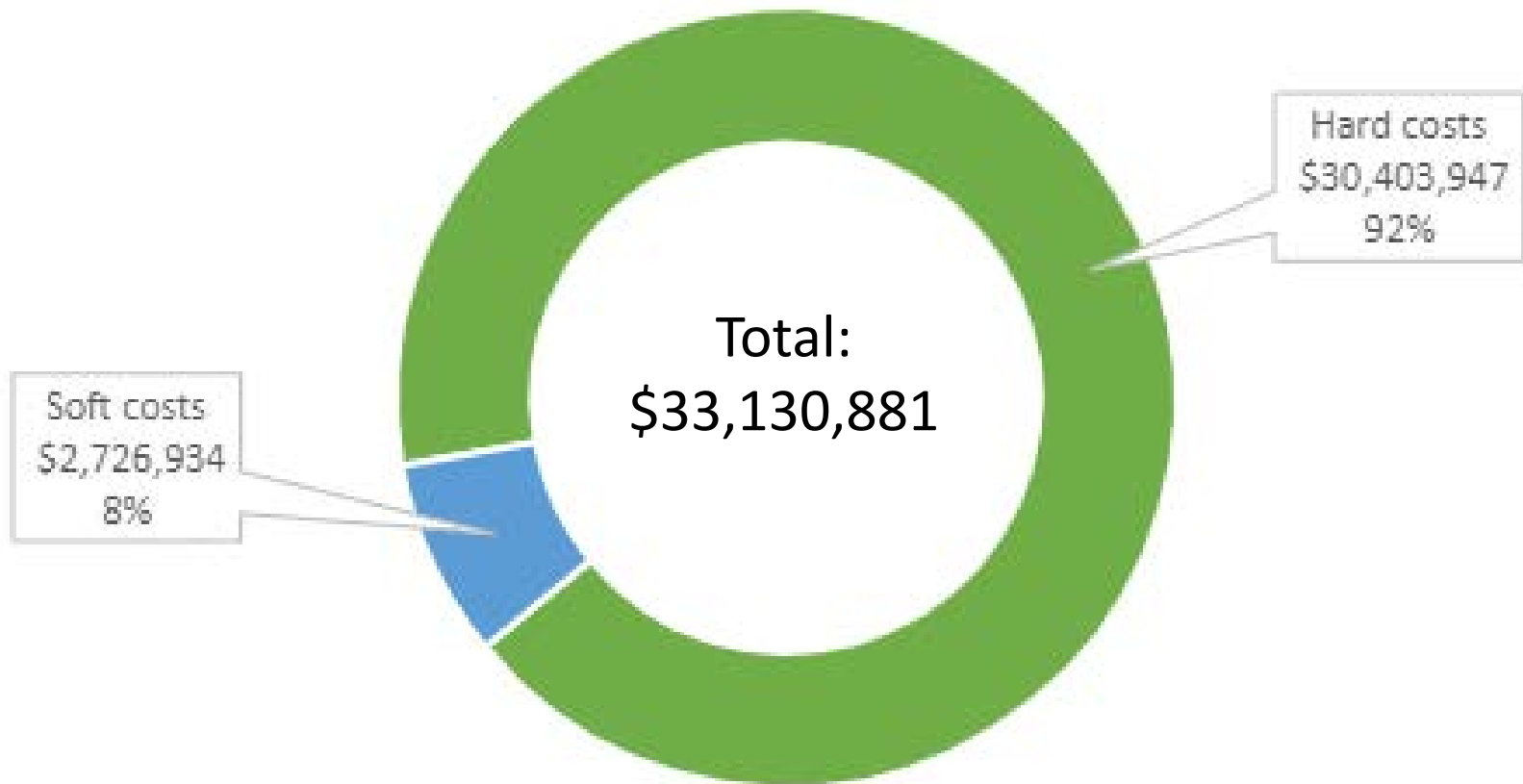
Wynn Watts Commons (Gresham)

Gerding Edlen/Pence
147 units

COBID Contracting Outcomes

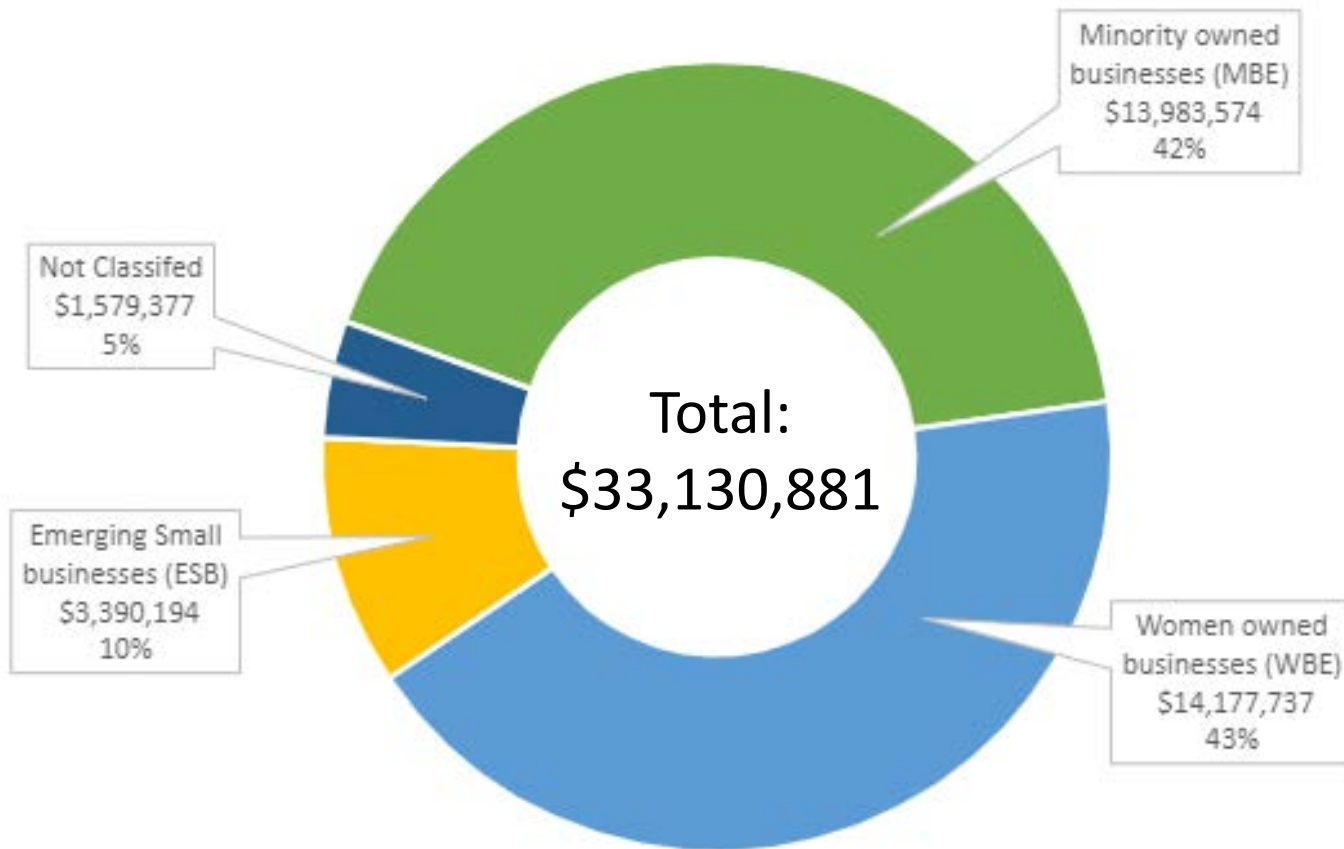
Project	Development Team	COBID Contracts paid	COBID Goal		COBID Outcome	
			Hard costs	Soft costs	Hard costs	Soft costs
Mary Ann (Beaverton)	REACH/Walsh	\$4M	20%	20%	27.5%	22.6%
Findley Commons (Portland)	Home First/Beaudin	\$1.3M	24%	20%	19.7%	58.4%
Tukwila Springs (Clackamas)	HACC/Walsh	\$2.5M	Hard and soft costs combined			
			20%		21.9%	
The Valfre at Avenida 26 (Washington)	DCM/ LMC	\$3M	20%		30%	
Viewfinder (Washington)	CDP/ Bremik	\$5M	20%		21.9%	
Wynne Watts (Gresham)	Gerding Edlen/Pence	\$8.2M	20%		25.4%	
Rockwood Village (Gresham)	CDP/LMC	\$9.1M	20%		21.9%	
		\$33.1M				

Payments to COBID firms by hard vs. soft costs



Payments made to COBID-certified firms for projects completing construction by fall 2022
(seven development projects)

Payments to COBID firms, by firm type

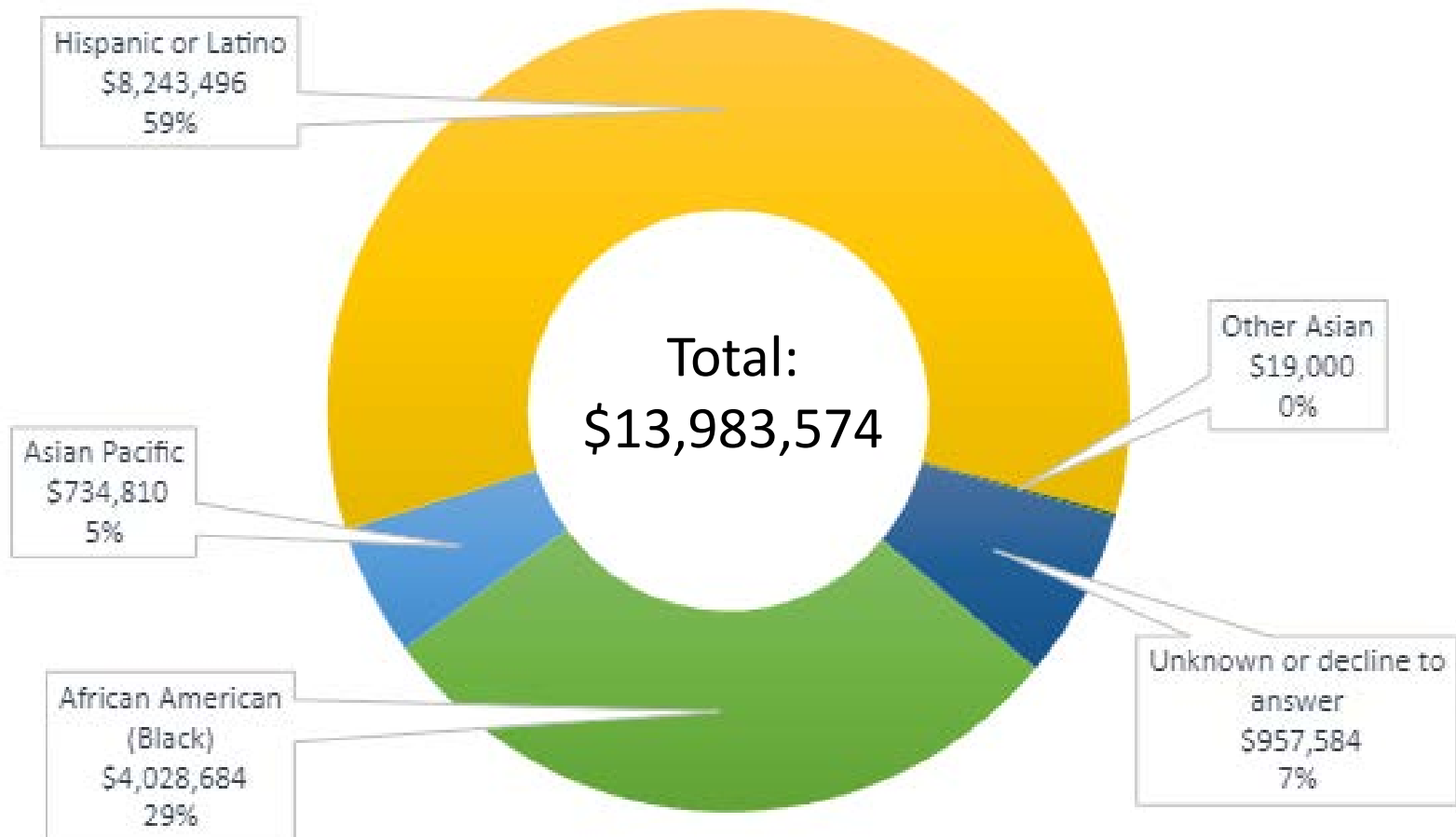


Payments made to COBID-certified firms for projects completing construction by fall 2022 (seven development projects).

Firms with multiple certification types were grouped according to the following hierarchy: MBE, WBE, SDV, Other. There were

\$4.2M in payments made to veteran-owned firms, but all of those were also MBE or WBE so they do not show up here.

Payments made to MBE firms

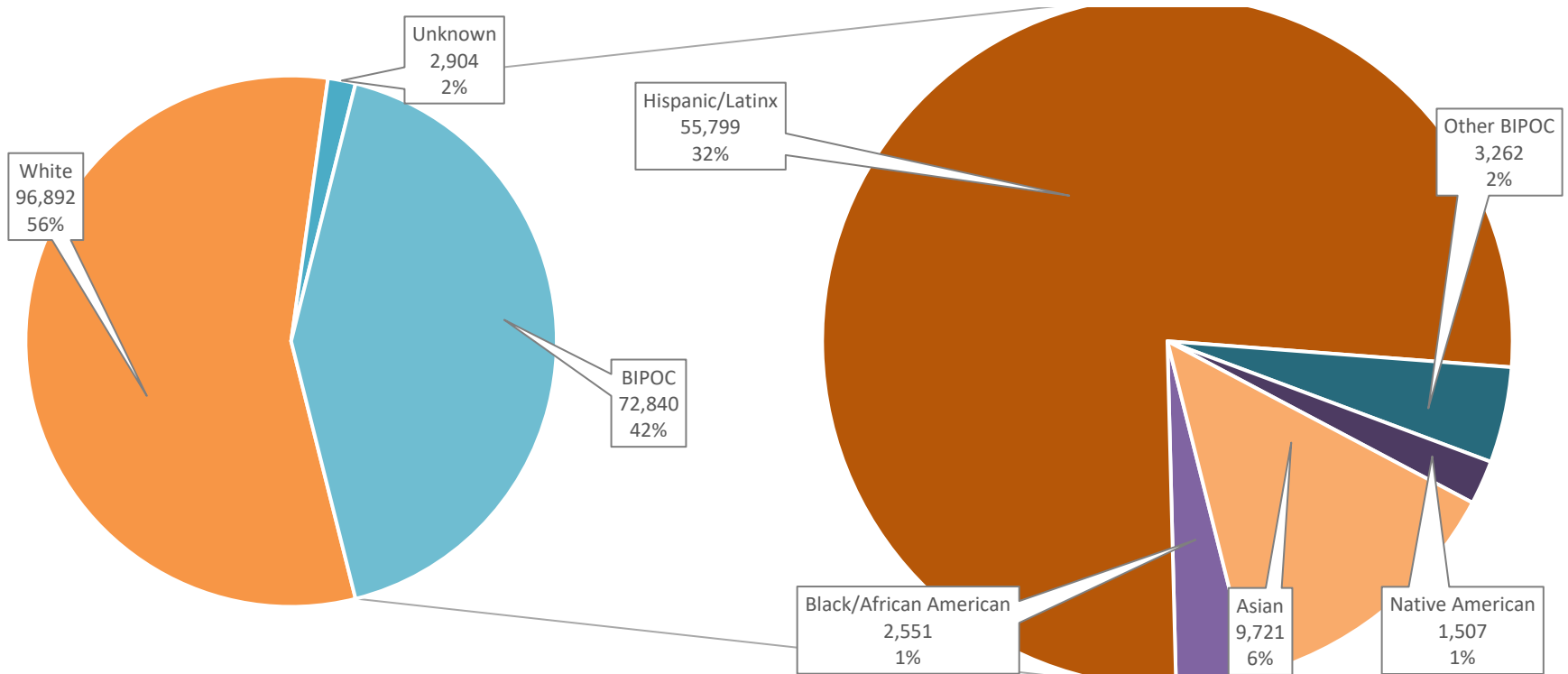


Payments made to COBID-certified firms for projects completing construction by fall 2022 (seven development projects)

Workforce participation goals and outcomes

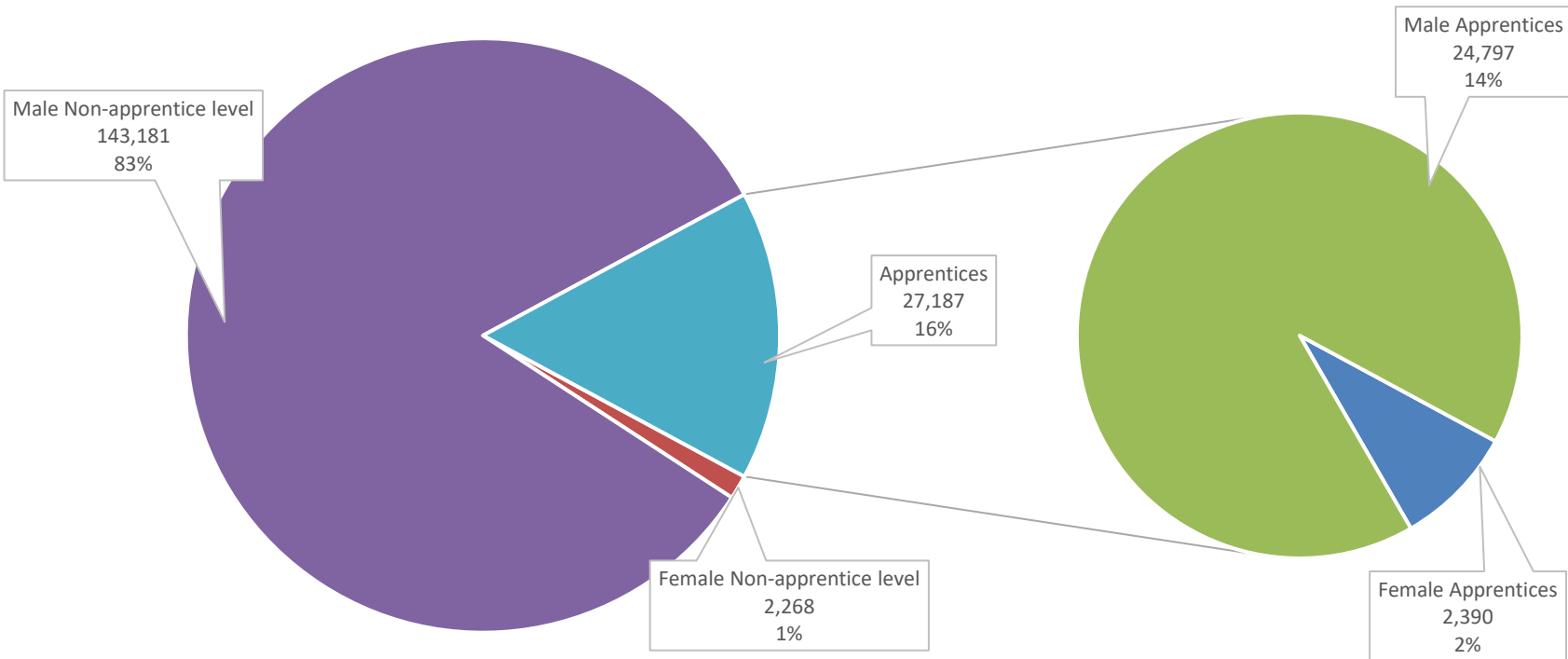
Project Name	Workforce Goals and Outcomes % of labor hours worked by POC, women, apprentices					
	Goal			Outcome		
	POC	Women	Apprentice	POC	Women	Apprentice
Findley Commons (Portland)	18%	9%	20%	41.9%	0.459%	18.4%
Viewfinder (Washington County)	N/A	N/A	N/A	42.3%	2.5%	18.4%
Mary Ann (Beaverton)	N/A	N/A	N/A	41.9%	0%	11.8%

Hour worked by race/ethnicity



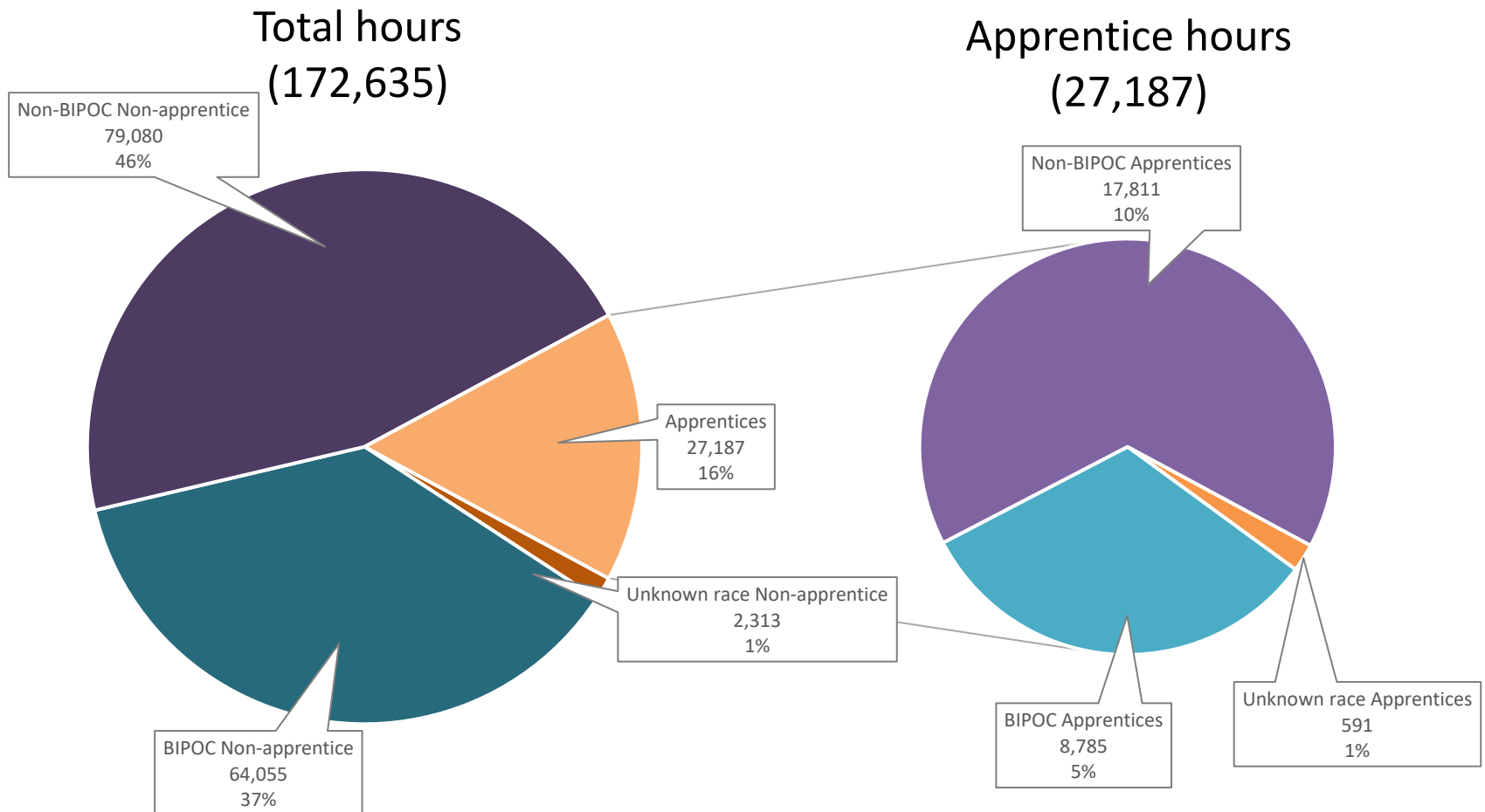
Workforce hours for three projects that reached completion by fall 2022. A total of 172,635 hours were reported for these three projects combined.

Hours worked by gender



Workforce hours for three projects that reached completion by fall 2022. A total of 172,635 hours were reported for these three projects combined.

Hours worked by Apprentices/Non-Apprentices



Workforce hours for three projects that reached completion by fall 2022. A total of 172,635 hours were reported for these three projects combined.

Contracting/workforce outcomes

Questions:

- *Is this the right way to look at the data?*
- *What questions do you have?*
- *What expertise would be helpful to bring in the future?*

Preview of post-occupancy data



Preview occupancy demographics for six projects that have reached full occupancy

Feedback on approach to analyzing and summarizing data

Next steps for evaluating equitable access outcomes

Preliminary occupancy outcomes



The Valfre at Avenida 26
Forest Grove
36 units



Mary Ann
Beaverton
54 units



Rockwood Village
Gresham
224 units, 47 bond funded units



Viewfinder
Tigard
81 units



Tukwila Springs
Gladstone
48 units



Findley Commons
Portland
35 units

Occupancy outcomes methodology

- Voluntarily provided demographics for race and ethnicity, disability status, and age.
- Neighborhood and regional comparisons
 - 0.5 mile buffer around properties – using combination of census data and residential housing patterns
 - Race and ethnicity – 2020 Census redistricting data set
 - Disability – 2017-2021 American Community Survey
 - Age - 2017-2021 American Community Survey
- Data gaps
 - Inconsistent data entry (improvements to data tools and/or technical assistance may be needed)
 - Demographic information is voluntary; some tenants choose not to disclose

Occupancy outcomes – race and ethnicity

	AHB occupants and households		Demographic data for 0.5 miles from property	
Project	% of total occupants who provided race/ethnicity	% BIPOC of occupants who provided race/ethnicity	% of families in surrounding neighborhood that are BIPOC	% of families with income less than \$60k that are BIPOC
The Valfre at Avenida 26 (Washington) 92 occupants, 36 units	100%	79%	20%	26%
Rockwood Village (Gresham) 141 occupants, 47 Metro bond funded units	22%	65%	45%	50%
Mary Ann (Beaverton) Total occupants not reported, 54 units	N/A	19% of households	48%	71%
Tukwila Springs (Clackamas) 48 occupants, 48 units	77%	41%	16%	19%
Viewfinder (Washington) 189 occupants, 81 units	33%	19%	20%	34%
Findley Commons (Portland) 35 occupants, 35 units	94%	12%	19%	30%
Total	53%	45%	30%	44%

Regional Rates: BIPOC Families by neighborhood = 27% BIPOC families with income less than \$60k = 38%

Occupancy outcomes - disability

Project	AHB occupants and households		Demographic data for 0.5 miles from property
	% of total occupants who provided disability status	% living with a disability	% living with a disability by neighborhood
The Valfre at Avenida 26 92 occupants, 36 units	92%	11%	11%
Rockwood Village 141 occupants, 47 units	33%	11% of households	13%
Mary Ann Total occupants not reported, 54 units	N/A	N/A	16%
Tukwila Springs 48 occupants, 48 units	100%	69%	17%
Viewfinder 189 occupants, 81	43%	7% of households	15%
Findley Commons 35 occupants, 35 units	100%	34%	13%
Total	56%	NA	14%

Regional Rate: Disability = 11%

Occupancy outcomes - age

Project	AHB Occupants			Demographic data for 0.5 miles from property		
	% under age 6	% under age 18	% 62 or older	% under age 5	% under age 18	% 62 or over
The Valfre at Avenida 26 92 occupants, 36 units	18%	51%	1%	5%	24%	11%
Rockwood Village 141 occupants, 47 units	13%	52%	6%	8%	31%	12%
Mary Ann Total occupants not reported, 54 units	N/A	N/A	N/A	5%	20%	19%
Tukwila Springs 48 occupants, 48 units	0%	0%	35%	3%	16%	25%
Viewfinder 189 occupants, 81 units	21%	50%	4%	6%	21%	20%
Findley Commons 35 occupants, 35 units	0%	0%	37%	4%	16%	12%
Total	18%	43%	9%	6%	22%	15%

Regional Rates:

Under 5 = 6%

Under 18 = 21%

62 and Over = 18%

Occupancy outcomes

Questions:

- *Is this the right way to look at the data?*
- *What questions do you have?*
- *What expertise would be helpful to bring in the future?*

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

