



Metro

600 NE Grand Ave.  
Portland, OR 97232-2736

# Agenda

Meeting: Housing Bond Oversight Committee Meeting  
Date: Monday, April 1, 2024  
Time: 3:00 p.m. to 5:30 p.m.  
Place: Virtual meeting ([Zoom link](#))  
Purpose: Discuss implementation progress with three jurisdictions and Metro SAP.

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3:00 p.m. Welcome and Introductions

3:10 p.m. Conflict of Interest Declarations

3:15 p.m. Public Comment

3:20 p.m. Director Update

3:30 p.m. Annual Progress Report: Portland Housing Bureau - *Presenting: Tanya Wolfersperger, Danell Norby, and Helmi Hisserich*

- LIP staff presentation: The Committee identified the questions/areas of interest for LIP presentations, in addition to any questions specific to each jurisdiction's progress report.
  - 1) *Provide an overview of where your jurisdiction is in the process of committing funds and your timeline for committing remaining funds*
    - *Metro staff will prepare 1 slide with Figure 1 from your Progress Report*
  - 2) *Share an example of a project(s) that has completed construction. What are your lessons learned on:*
    - *Equitable contracting and workforce participation*
    - *Affirmative marketing strategies, partnerships for referral and low-barrier lease up*
    - *Projects that have included Permanent Supportive Housing. Provide a description of the PSH units, % of building, population served, and service providers*
  - 3) *Share an example of a project(s) in pre-development*
    - *Share about any known financing issues including the impacts of private activity bonds shortfall, market issues, or gaps. Does the project have a PAB/LIHTC allocation?*
    - *Share about the impacts of cost escalation on housing quality. How are development partners and jurisdictions solving for cost increases?*
  - 4) *What are your overall lessons learned on the Metro AHB?*
- Q/A and discussion

4:00 p.m. Break

- 4:10 p.m. Annual Progress Report: Home Forward - *Presenting: Amanda Saul*
- LIP presentation – *see questions above*
  - Q/A and discussion
- 4:30 p.m. Annual Progress Report: Gresham - *Presenting: Hawie Petros*
- LIP presentation – *see questions above*
  - Q/A and discussion
- 4:50 p.m. Annual Progress Report: Metro Site Acquisition Program – *Presenting: Patrick McLaughlin, Jonathan Williams, and Andrea Pastor*
- LIP presentation – *see questions above*
  - Q/A and discussion
- 5:10 p.m. Committee discussion and reflection on themes from local presentations
- 5:25 p.m. Closing/Next steps
- 5:30 p.m. Adjourn

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

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## Housing Bond Oversight Committee Meeting Summary

Meeting: Housing Bond Oversight Committee Meeting  
Date: Monday, January 22, 2023  
Time: 3:00 p.m. to 5:30 p.m.  
Place: Virtual meeting (Zoom)  
Purpose: Provide committee with updates on Affordable Housing Bond program progress, communications, and policy and the 2023 Affordable Housing Bond audit

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### Attendees

Kira Cador (she/her), Scott Greenfield (he/him), Ann Leenstra (she/her), Co-chair Jenny Lee (she/her), Mary Nolan, Ex-Officio (they/them), Jeffery Petrillo (he/him), Mara Romero (she/her), Katherine Rozsa (she/her), Co-chair Steve Rudman (he/him), Andrea Sanchez (she/her), Karen Shawcross (she/her), Trinh Tran (he/him), Juan Ugarte Ahumada (he/him)

### Absent Members

Brandon Culbertson (he/him), Nicole Stingham (she/her), Willie Poinsette (she/her)

### Metro staff

Betsy Emery (she/her), Liam Frost (he/him), Emily Lieb (she/her), Lo Miranda (they/she), Jimmy Oporta (he/him), Yvette Perez-Chavez (she/hers), Patricia Rojas (she/her), Andy Shaw (he/him), Alison Wicks (she/her)

### Facilitator

Ben Duncan, Kearns & West (he/him)

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

### Welcome and Introductions

Co-chair Jenny Lee welcomed the Committee to the meeting and asked for a moment of silence to acknowledge those who had lost their lives in the recent ice storm event. She thanked Kira Cador, Trinh Tran, Brandon Culbertson, Willie Poinsette, and Nicole Stingham for their work on the Committee as they finished their term. She thanked Karen Shawcross, Mara Romero, Ann Leenstra, and Andrea Sanchez for committing to an additional two-year term.

Ben Duncan, Kearns & West, facilitated introductions between Committee Members and reviewed the agenda. Katherine Rozsa and Jeffery Petrillo introduced themselves as new Committee Members.

The Committee approved the September 18<sup>th</sup> Meeting Summary.

## Housing Bond Oversight Committee Meeting Summary

### Conflict of Interest Declarations

Ben Duncan, Kearns & West, reminded Committee members that at each meeting, members must declare a conflict of interest on any meeting agenda items. He noted that annually, members must fill out a conflict of interest form and keep it updated if their professional work changes. He stated that members should email Lo Miranda, Metro, to complete the conflict of interest form if they haven't already.

Andrea Sanchez declared a conflict of interest at her organization, the Housing Development Center is the development consultant on several Supportive Housing Services (SHS) and Bond funded projects. She noted that the Housing Development Center is on a joint venture partnership with Bienestar for a project.

Ann Leenstra declared a conflict of interest as she is on the Clackamas County Housing Commission.

Jeffery Petrillo declared a conflict of interest as he serves on the Advisory Board for Community Partners for Affordable Housing which is involved with Bond funding with the Portland Value Inn.

### Public Comment

No public comment was received.

### Director Update

Patricia Rojas, Metro, shared that in June 2023 Metro Council approved hiring 22 new full-time employees for the housing department to be hired by June 2024. She detailed the areas of work where each employee will be supporting, and which positions have been filled and which are still open.

Andy Shaw, Metro, reflected on the success of the Bond program and shared that Metro has begun looking at future housing investment measures, including new property taxes and reinvestment of SHS funds. He shared that bonds have limitations and due to price increases, it would take a larger bond amount to achieve the same number of units as the current Bond. He shared that Metro will begin a stakeholder process and convene community members to discuss if this is the right time for a new tax or reinvestment of SHS funds which will feed into recommendations for a potential ballot measure this year.

Karen Shawcross asked if a legal analysis was completed to see if it is possible to use the SHS funds.

*Andy Shaw, Metro, replied that as currently written, SHS funds can only be used for "sticks and bricks" capital investments if it is connected to services. He stated that the ask to voters would be to extend the sunset to collect revenue for the Bond and change the language to use the additional SHS funds for "sticks and bricks" or the construction of affordable housing.*

Kira Cador asked if sticks and bricks meant development or acquisition.

*Andy Shaw, Metro, replied it is for similar uses as the existing bond.*

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Patricia Rojas, Metro, stated there will be a lot of thinking on the correct approach, and that the convening Andy Shaw mentioned is to collect information and share that with Metro's Chief Operating Officer to inform her recommendation to Metro Council.

Andrea Sanchez asked to clarify if Metro is going to voters for two reasons, one to extend the Bond sunset and the other to change SHS allowed uses.

*Andy Shaw, Metro, replied yes and that the stakeholder process would unpack that.*

Jeffery Petrillo asked if there is a plan b if it is rejected by voters and if one of the options would be to return the funds to the taxpayers.

*Andy Shaw, Metro, replied that any organization can propose ballot measures and that he has heard questions and ideas on SHS such as reducing the tax rates or other ways to redirect resources. He added that the process could result in not putting anything on the ballot in November, but the priority is to discuss with stakeholders how to invest.*

Mara Romero asked if there were specific reasons why SHS is not to be used for sticks and bricks and what stakeholders Metro is planning to bring to the table.

*Patricia Rojas, Metro, responded that the Legal Team informed them that the SHS measure as written doesn't allow for the construction of affordable housing, as it is services-focused. She shared that it can be used to secure the capital necessary for services, but not the direct building of housing. She reflected on how the Affordable Housing Bond and the SHS measure were created at different times and weren't aligned.*

*Andy Shaw, Metro, replied that Metro is thinking through all the interests that need to be at the table including racial and geographic diversity, businesses, and those with experience with housing services. He added that there would be subcommittees that would focus on specific work that may include additional individuals.*

### Affordable Housing Bond Audit

Brian Evans, Metro Auditor, introduced himself and shared that the audit has two objectives: to identify gaps or duplications in administration and to conclude on the status of audit recommendations in 2021. He stated that the auditing team communicated with Metro management during the audit. He shared that the audit found Metro made significant progress from the audit's 2021 recommendations and that Bond funds are building new and preserving existing units aligned with the Bond's goals. He noted that the Bond is moving into its next phase which will require more outcome reporting.

Angela Owens, Metro Auditor, shared that seven of the nine 2021 recommendations were fully implemented and the other two recommendations were in process. She noted that for quality control, conflict disclosure forms should be kept up to date and that for performance, workforce data was collected for some, but not all projects. She added that there were some instances of administration duplication and gaps, including inconsistent administration standards and a lack of a long-term housing plan. She recommended that Metro strengthen reporting requirements and

## Housing Bond Oversight Committee Meeting Summary

identify sources of funds for ongoing staff responsibility. She noted that the Bond will not cover administration needs and if another bond is pursued to set realistic expectations.

Patricia Rojas, Metro, thanked the auditing team and noted that there was a detailed management response in the meeting packet that included plans and timelines.

Co-chair Steve Rudman noted good news doesn't get as much media coverage, and noted it was a shame that the Bond never covered administration costs but it is good information for the future. He appreciated the work the seven jurisdictions did in the implementation of the Bond.

Andrea Sanchez stated that there was a lot of good news in the report and reflected that there are so many bodies involved in affordable housing development. She asked where this Committee creates oversight efficiencies versus replication with other bodies.

*Brian Evans, Metro Auditor, replied that Metro is a new player in the housing space which is a fresh opportunity to look at the status quo. He reflected that Metro brought seven partners together under a new operating structure, where there is different oversight to avoid surprises.*

Mara Romero reflected that she saw similarities between the audit's recommendations and the Committee's recommendations, especially around administrative costs and better collaboration. She reflected that the lack of demographic information and data consistency is repetitive.

Karen Shawcross reflected that when she joined the committee, there were only three staff members, and thanked Emily Lieb and the team for what they had built from the ground up in a short amount of time. She shared her concern about the future and ensuring building performances sustained the intent of the Bond in management leasing and operations.

### Affordable Housing Bond Program Updates

Betsy Emery, Metro, shared congressional updates highlighting that Senator Ron Wyden's bipartisan tax package has been released and includes renewing the Child Tax Credit and the Low-Income Housing Tax Credits (LIHTC). She shared that LIHTC would reduce the threshold test for private operation bonds, allowing private activity bonds to last longer. She added that the package needs a two-thirds majority vote in the House and sixty votes in the Senate to pass.

Emily Lieb, Metro, added that private activity bonds are required financing for affordable housing developments and this package will help solve the challenge of over-prescription of private activity bonds.

Andrea Sanchez asked if reducing the threshold test would be for a limited amount of time.

*Betsy Emery, Metro, replied that most tax packages are for two to four years and that this tax package would be for e2024-2016 depending on when it is passed.*

Alison Wicks, Metro, shared had exceeded their total unit production goal as of the end of December 2023. She detailed the interest earnings for Permanent Supportive Housing (PSH) Investments and shared that Metro is working with each county to provide funding for the construction or acquisition of new PSH units.

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Jimmy Oporta, Metro, detailed how many units were complete, under construction, and in pre-construction by total units, very affordable units, and family-sized units. He shared a map of unit locations and placed a link [<https://www.oregonmetro.gov/public-projects/affordable-homes-greater-portland/progress>] in the chat for members to read more information.

Co-chair Steve Rudman thought that Metro was trying to get all jurisdictions to commit all their funding and asked if the Post Office Project counted and if the numbers Jimmy Oporta shared included forecasts.

*Alison Wicks, Metro, replied that the Post Office Project doesn't count as it hasn't come in yet.*

*Jimmy Oporta, Metro, replied that the numbers are accurate as of the end of 2023 and will be higher at the end of Q1 of 2024.*

Andrea Sanchez asked if the projects Alison Wicks discussed were in the packet under "Regional Production Progress."

*Alison Wicks, Metro, replied no, as the project have not been submitted yet.*

Andrea Sanchez asked of the 1,521 units in pre-construction, how many are held up due to heightened demand and insufficient private activity bond allocations.

*Alison Wicks, Metro, replied she didn't know off the top of her head, but has analyzed private activity bonds available this year and future years.*

Andrea Sanchez asked with the recent awards that came from Oregon Housing & Community Services Department (OHCS) for private activity bonds and 4% income loan tax credits, how that moves Metro's pipeline forward.

*Alison Wicks, Metro, replied she would look into that.*

Scott Greenfield asked if there are inter-dependencies like Local Innovation and Fast Track (LIFT) funds.

*Emily Lieb, Metro, replied that there is a broader alignment conversation with the state and that LIFT is layered in with funds in different ways across the portfolio.*

Karen Shawcross noted how helpful Nicole Stingh was on the Committee and asked if it was possible to get another OHCS representative on the Committee.

*Emily Lieb, Metro, replied that Nicole was on the Committee as an individual but did a great job in supporting that need. She reflected that OHCS staff are stretched thin and don't have jurisdictional representatives on the Committee but shared that Director Bell could present information to the Committee.*

Alison Wicks, Metro, shared the Annual Report schedule and proposed meeting calendar for the first half of the year. She then asked the Committee what types of questions they would like to focus



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on for the jurisdiction presentations and shared last year's questions. She invited the Committee to provide feedback on the questions over email by February 2.

Mara Romero stated she would respond over email and that some questions would need to be updated to still be relevant. She shared that for question two, much of the work has been completed, and the question should be reframed as further along in the process.

Co-chair Steve Rudman agreed with Mara Romero and stated that question two is a key question and should include what is working and what isn't. He reflected that the question is, is affordable housing helping the homelessness problem? He added that he would be interested in the operations.

Kira Cador stated she would be curious to know what projects were on the pre-construction list and are no longer on that list and why.

Andrea Sanchez stated that question five was relevant last year as interest rates and material costs were rising, which has softened a bit now. She reflected that operation expenses are way beyond what projects were written and she is interested to understand how projects are operating financially and if any are at risk.

Karen Shawcross shared she consistently worries about demographic information and asked if there is some way to get that information to ensure the right people are in the properties.

*Jimmy Oporta, Metro, replied that they will be receiving demographic information from partners.*

Jeffery Petrillo shared that another concern is that insurance premiums have been increasing at a high rate, and with the recent weather events, they may increase again.

Kira Cador stated that for one of their LIHTC projects in a rural community, their insurance premiums increased by 70% because it was an affordable housing project.

*Jeffrey Petrillo stated that should be raised to the state commissioner as it seems discriminatory.*

### Communications Update

Lauren Everette, Metro, introduced herself and shared the story report that was completed after the 1,000-home milestone.

Ben Duncan, Kearns & West, asked if there was longitudinal tracking of individuals for story reporting.

*Lauren Everette, Metro, replied that is a cool idea and they haven't looked into that yet.*

Karen Shawcross stated it was a lovely report but missed the email somehow.

Mara Romero asked if was sent out community-wide, as she had missed it as well

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*Emily Lieb, Metro, replied that it went out to the interested parties list and Committee members.*

*Ben Duncan, Kearns & West, shared that Metro will do a better job of highlighting it in emails moving forward.*

Israel Bayer, Metro, introduced himself and shared that Metro just completed presenting results in Hillsboro and Clackamas County, which both spoke highly of the bond. He reflected that the Bond has had transformational experiences that the Committee should be proud of. He shared that the Metro Communications Team will grow into a team of five with the vision of having a turnkey system to work with the media and Council and of developing narrative changes and increasing engagement.

### Policy Updates

Alison Wicks, Metro, shared that earlier the Committee received the private activity bond update at the federal level, and shared that Metro will continue to coordinate, align, and share information with OHCS.

Emily Lieb, Metro, shared that Metro has been working with EcoNorthwest to develop landscape data for affordable housing and that there is a policy table supporting technical work alongside a stakeholder process.

Nui Bezaire, Metro, introduced herself and shared that she is the Supportive Housing Head focusing on PSH. She shared that Metro is embarking on a body of work that intersects SHS and the Bond focused on PSH, and she will have a future presentation to share more information.

### Closing and Next Steps

Co-chair Steve Rudman provided closing remarks, thanked Trinh Tran and Kira Cador for their work on the Committee, and welcomed Jeff Petrillo and Katherine Rozsa.

Ben Duncan, Kearns & West, shared that next steps include:

- Committee members to email Lo Miranda, Metro, to complete the conflict of interest form if they haven't already.
- Metro to look into how the recent awards from OHCS for private activity bonds and 4% income loan tax credits move Metro's pipeline forward.
- Committee to consider having the OHCS Director present updates at a future meeting.
- Committee members to provide feedback on the jurisdiction questions over email by February 2.

### Adjourn

The meeting adjourned at 5:30 p.m.

# Housing Bond Progress Report for City of Portland | 2023

This progress report summarizes how local jurisdictions are carrying out their Affordable Housing Bond strategies. Each year, jurisdictions share progress reports with Metro, which are then reviewed by the Affordable Housing Bond Community Oversight Committee. Metro staff then create a yearly report summarizing progress across all implementing areas.

## SECTION 1: UNIT PRODUCTION AND FUNDING

This section provides a high-level overview of the Affordable Housing Bond projects and units in your jurisdiction, along with plans to leverage SHS funding for rental assistance and/or services. Please review and confirm the information in Figure 1 and let us know of any changes.

**Figure 1. Production progress and resources committed**

Project	Total Project Cost	Metro Bond Funds (excludes SAP portion)	Number of BOND ELIGIBLE units <i>(excludes manager units and non-eligible units)</i>					Status  <i>Concept, final approval, construction, complete</i>	Construction start <i>(anticipated or actual)</i>  Month/Year	Completion  Month/Year
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units	Number of occupants (as of Dec-2023)			
Hattie Redmond	\$25,376,920	\$4,411,737	60	60	0	60	60	Complete	Oct-21	Feb-23
Dekum	\$82,764,636		147	61	78	0		Pre-construction	Mar-24	Jan-25
Findley Commons	\$7,041,707	\$1,945,175	35	0	0	35	45	Complete	Oct-20	Dec-21
Waterleaf	\$80,823,569	\$1,929,219	176	17	48	20	265	Complete	Dec-20	Dec-22
Beacon at Glisan Landing	\$21,091,228	\$5,822,000	41	41	0	41		Construction	May-23	Sept-24
Aldea at Glisan Landing	\$54,349,405	\$3,685,679	96	15	63	0		Construction	Mar-23	Jan-25
Dr. Darrell Milner Building	\$30,176,395	\$9,216,838	63	17	48	0		Construction	Jul-22	Feb-24

Albina One	\$65,651,518	\$14,424,597	94	32	55	0		Construction	Jun-23	Jun-25
Meridian Gardens	\$31,235,172	\$13,365,160	85	70	0	65		Construction	Jul-23	Sept-24
Hollywood Hub	\$140,391,988	\$29,084,328	73	39	24	0		Pre-Construction	Sept-24	Mar-6
PCC Killingsworth	\$44,655,307	\$2,538,237	84	28	60	0		Pre-Construction	Aug-24	Apr-25
Tistital Village	\$36,907,811	\$4,632,538	24	24	22	16		Construction	Mar-23	Aug-24
Powellhurst Place	\$27,420,039	\$4,091,048	64	12	45	12		Construction	Aug-22	Mar-24
Garden Park Estates	\$57,875,061	\$2,239,308	54	25	40	25		Construction	Jun-23	Apr-25
Barbur	\$70,776,445	\$22,519,248	149	32	102	0		Pre-Construction	December 24	June 26
Carey Boulevard	\$23,130,574	\$6,087,267	53	0	53	0		Pre-Construction	Jul-25	Feb-29
Carter Commons	\$27,325,363	\$5,800,000	62	21	0	0		Pre-Construction	Jun-24	Aug-25
Portland Value Inn	\$56,644,399	\$6,155,974	98	39	58	15		Pre-Construction	April 25	Aug-26
Strong Site	\$38,216,501	\$11,250,000	75	11	54	0		Pre-Construction	August-24	Mar-26
Abbey Site	\$5,084,152	\$1,200,000	8	0	8	0		Pre-Construction	Apr-24	Feb-25
<b>Total committed or underway</b>		<b>\$150,398,353</b>	<b>1541</b>	<b>544</b>	<b>757</b>					
<b>LIS commitment</b>		<b>\$199,652,992</b>	<b>1,475</b>	<b>605</b>	<b>737</b>					
<b>% of commitment complete</b>		<b>75%</b>	<b>104%</b>	<b>90%</b>	<b>103%</b>					
<b>Remaining for LIS</b>		<b>\$49,254,639</b>	<b>Goal Exceeded</b>	<b>61</b>	<b>Goal Exceeded</b>					

\*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).

## SECTION 2: LOCAL IMPLEMENTATION STRATEGIES UPDATE

***Please share how the development plan in your LIS is going. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:***

*a. Results of competitive selections, who was involved and how LIS criteria influenced the outcome.*

In August 2023, PHB issued the 2023 M-BOS Last Gap Solicitation which prioritized Metro, PHB and Multnomah County. The M-BOS consisted of:

- Up to \$10,000,000 in Metro Housing Bond funds for capital expenses for new construction of previously unregulated housing units
- Up to \$9,088,000 in Metro Housing Bond funds for capital expenses for new construction of previously unregulated, permanent supportive housing (PSH)
- Up to \$9,750,000 in Multnomah County general funds for capital costs and acquisition costs for new units of regulated affordable housing
- Eligible Costs under the Portland Clean Energy Fund (PCEF) program with PHB for up to 10% of total hard construction costs.

PHB received 13 proposals for the M-BOS Last Gap Solicitation. A Technical and Financial Feasibility Review team evaluated how each proposal met the requirements and qualifications of the M-BOS and rated the proposals, red, yellow, or green. Three separate Community Review committees, with knowledge of affordable housing, were established, - one for the Family Sized proposals, one for the PSH proposals, and one for Shovel Ready proposals.

Recommendations on the awardees were provided to the current Commissioner in charge (Commissioners Rubio) and to Metro, Multnomah County and JOHS in December 2023. Concept Endorsements have been received for one of the projects, PCC SE. The remaining Concept Endorsements are expected in February and March 2024.

The four awarded projects will move into construction within the next few months and will create 251 new affordable rental and homeownership units, including 53 extremely low-income units; 22 Permanent Supportive Housing units for chronically homeless individuals, couples, or families; and 144 family-sized units.

<b>Addition of Last Gap Projects</b>	<b>Total Units</b>	<b>PSH Units</b>	<b>Family-Sized Units</b>	<b>30% AMI Units</b>
Existing Projects	1,539	289	747	544
New Project Awards (Last Gap MBOS)	251	22	144	53
<b>Total</b>	<b>1790</b>	<b>311</b>	<b>891</b>	<b>597</b>
<b>Metro Bond Goal</b>	<b>1,475</b>	<b>300</b>	<b>737</b>	<b>605</b>
<b>% Achieved</b>	<b>121%</b>	<b>104%</b>	<b>121%</b>	<b>99%</b>

*b. How projects are efficiently using Metro bond funds and other public funding.*

Projects receiving an award of Metro Bonds have initially been awarded up to \$150,000 per unit, though this amount is sometimes lessened if proposals show a balance of sources and uses at time of submission and require less subsidy. While in some cases Metro Bond amounts have increased in response to a growing finance gap caused by inflation, delays in closing, rising interest rates, etc., PHB has looked to other sources of funding to supplement the use of Metro Bonds and get projects to finance close and on to construction. PHB has leverages HOME funds, Portland Housing Bonds, and River District, South Park Blocks and Interstate Tax Increment Financing to supplement Metro Bond funding and finance more projects and create more units than Metro Bonds alone would afford. In the past year, a partnership with Bureau of Planning and Sustainability has resulted in Portland Clean Energy Funds helping to finance the cost of air conditioning and energy efficiency improvements, stretching Metro Bond funds further and enabling PHB to meet or surpass our Metro Bond production goals.

PHB’s recent “Last Gap” Metro Bonds solicitation enabled PHB and Metro to award a lower level of subsidy with an outsized impact. Smaller funding awards of between \$21,000 and \$104,000 per unit are making the difference and bringing 251 new affordable rental and homeownership units online, closing finance gaps that were preventing these projects from closing and moving on to the construction phase. For these projects, Metro Bonds are truly gap financing, as Metro funds are the last funding source needed to balance out sources and uses and get these projects underway.

*c. Summarize ongoing commitments for project-based rental assistance and supportive services as well as progress in achieving any PSH goals.*

Pairing capital Metro Bonds with rental assistance vouchers from Home Forward and operating subsidy from JOHS helps all three agencies meet our commitments to expanding production of supportive housing units. For well over a decade, regional and local implementation plans have unit-based goals for the creation of new PSH units (10-year Plan to End Homelessness, A Home For Everyone, etc.). With the recent “Last Gap” M-BOS solicitation, PHB has exceeded our agency goal of developing 300 new PSH units, using Metro Bond funds.

*d. Summarize impacts of increased construction costs and private activity bond constraints on Metro bond housing projects. Please describe how the jurisdiction is working with developers to ensure housing quality and mitigate risks when projects face cost escalations, unexpected challenges, or delays related to local regulations or the changing funding landscape.*

The past few years have shifted the funding landscape in a few ways, but universally, affecting all affordable projects under construction and in predevelopment. Interest rates have increased to the highest rate we’ve seen in two decades, ultimately increasing the cost per unit. At this time last year, developers were assuming a 1% increase in hard costs per month of delay.

But in the past two years, the largest funding-related constraint we’ve seen in our projects is the shift from noncompetitive to fiercely competitive and massively oversubscribed private activity bonds, which leverage private equity to finance approximately 50% of the permanent costs to develop. The oversubscription of PAB’s has resulted in fewer PAB solicitation offerings, and an environment where the timing of finance close needs to be more accurate, as the balancing of last year’s carryover to this year’s available to next year’s projected private activity bonds is crucial.

Partly because PHB has offered several PHB and Metro-owned sites in recent solicitations, PHB and Metro Bonds have often been the first funding source secured. This helps our projects be prioritized for private activity bonds, because projects who have secured substantial local funding are prioritized over projects without local funds. First priority for 4% LIHTC/PAB’s is Housing Authorities. Next are projects with significant local funding, defined as a project that has the lesser of 10% of its total project resources or \$5 million dollars from a local jurisdictional gap subsidy source. Despite this prioritization, PHB is fiercely advocating for two Metro Bond-funded projects that were not awarded private activity bonds in this most recent offering. Through emails and correspondence with OHCS staff, HIPP team and PHB leadership are advocating for PAB’s so that Hollywood hub and Barbur Apartments can close this year, as planned. The sponsors of these two projects are also pressuring OHCS to award PABs, because delays in closing will result in cost increases and a delay in unit delivery.

*e. How Supportive Housing Services (SHS) funding is being integrated or leveraged to support outcomes for serving very low-income households and households experiencing or at risk of homelessness.*

Metro Bond funds have been awarded through competitive solicitations, in close coordination with our partner agencies the Joint Office of Homeless Services and our housing authority, Home Forward. For development proposals including new PSH units, PHB-awarded Metro Bonds are coupled with Project-based Section 8 vouchers from Home Forward and operational subsidy from JOHS, offered together in a conditional award letter. Pairing capital funding for development of supportive housing units with rental assistance and operational subsidy is integral to the operational success of supportive housing units. The rental assistance ensures that PSH units don't become an operational liability for housing providers, strengthening their income stream while allowing us to regulate the rents at the extremely low-income level of 30% area median. The PHB-JOHS partnership created by the Metro Bond program has established a base level of operational subsidy for all new PSH units of \$10,000 per unit per year, and standard practices of a tri-party agreement between housing provider, JOHS, and those providing supportive housing services. Capital Bond funds leverage supportive housing services funded by the Metro SHS measure, which allows those units to truly be supportive housing units (with wraparound supports and case management), filled from the Coordinated Access list, and not just regulated units that are deeply affordable.

*f. Describe the approach and timelines for achieving remaining unit production targets, including any priorities for remaining unit production targets, such as homeownership or supportive housing.*

With the announcement of awardees of the M-BOS Last Gap, PHB has exceeded all Metro goals other than the 30% units. With the additional 53 30% units awarded in the Last Gap solicitation, PHB has reached 99% of the 597 30% goal. Remaining Metro funds will be used in an upcoming Broadway Corridor RFQ, where more Metro units will be added to the total unit production count, as well as ultimately meet the 30% goal outlined above.

### **SECTION 3: PROJECT HIGHLIGHTS**

*This section is intended to provide a brief overview of each project in the pipeline—and some of the noteworthy features.*

***Please provide a summary of each project in your portfolio, along with an image of the project. Be sure to describe:***

- a. Who the project intends to serve.*
- b. Project team and partnerships*
- c. Noteworthy features or highlights (e.g., community space, free wi-fi and project amenities)*
- d. How projects are incorporating sustainability, climate resilience and AC/cooling strategies to keep people safe*
- e. Anything else worth highlighting*



- **Carter Commons**



M. Carter Commons is a new affordable apartment development for North Interstate Avenue and Overlook Park, proposed by co-owners and developers Urban League of Portland and Northwest Housing Alternatives. The project is envisioned to have 62 affordable and accessible apartment homes for residents 55 years and older. A community room, property management and resident services offices, laundry, and a protected entry courtyard will all be accessible to the residents. The developer team will utilize the N/NE Preference Policy list, prioritizing applicants who have been impacted by urban renewal in North and Northeast Portland. Urban League of Portland will lead outreach, as well as culturally-specific and responsive services in collaboration with NHA’s resident services.

The project, located on land donated by Kaiser Permanente, will be named M. Carter Commons after Margaret Louise Carter, Oregon’s first Black woman legislator. The project is directly adjacent to a light rail stop with frequent access to local services, activities, and regional mass transit connections. The site is across the street from a Kaiser Permanente medical campus and within one block of the historically Black Albina District neighborhoods. The project is ideally located for affordable senior housing and focused on serving Communities of Color. Funding sources for M. Carter Commons include Metro Bond funds, Interstate Corridor Tax Increment Financing, and project-based vouchers from Home Forward.

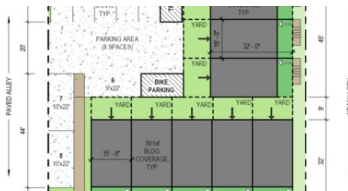
- **Strong Site**



Located at the prominent intersection of N. Alberta Street and N. Williams Avenue and purchased by PHB from longtime neighborhood residents the Strong family, this property embodies a visual and historical significance for long-time residents of North and Northeast Portland. Of the 75 total units proposed by CDP and SEI, 11 will be affordable to households earning 30% AMI or below and 54 units will be family-sized, with 2 or more bedrooms. The project will include a large outdoor courtyard, private playground area, laundry, and an indoor community room, all to foster community among the residents. These amenities are intended to provide indoor and outdoor spaces outside of one's apartment where residents can gather for community events, classes, informal get-togethers, and recreation at the onsite play structures. SEI will provide resident services and outreach with an emphasis on supporting African American families earning 30% AMI or below. Utilizing the N/NE Preference Policy list, this development will prioritize housing those whose families have been displaced by urban renewal's legacy in North and Northeast Portland.

To align the project with the N/NE Oversight Committee's efforts, CDP and SEI have acquired the neighboring Abbey Lot for the development of 8 homeownership units, which will be regulated at 60-100% AMI. The Metro Bond and Interstate Corridor Tax Increment Financing will contribute to financing the capital costs.

- **Abbey Site**



Collectively, Self Enhancement Inc. (SEI) and Community Development Partners (CDP) are referring to the Strong Family Site and the Abbey Lot Townhomes as Alberta Alive Phase III. Phase I and Phase II are currently under construction. Alberta Alive Phase I is a two-building development (NE Grand Ave, NE 8th Ave) with a combined 52 units designed for families and veterans. Phase II is Dr. Darrell Millner Building - a 63-unit building designed for families, with Metro Bond funding from PHB.

On the corner of NE Alberta Street and NE Mallory Avenue, CDP and SEI will construct eight 3-bedroom, 2.5-bath, permanently affordable townhomes with priority to families on the N/NE Preference Policy waitlist. The Abbey Lot Townhomes will maintain permanent affordability, as the development team partners with community stakeholders to develop a replicable homeownership structure that reflects the priorities of the families who will live in these homes.

Prospective homeowners will also gain access to Homeownership Education and Counseling Programs and downpayment assistance resources through SEI and others, which help first-time homebuyers become mortgage-ready.

- **Carey Blvd.**



The Carey Boulevard site will consist of a clustered arrangement of 53 townhomes with 2, 3, or 4 bedrooms, and all will be offered as permanently affordable homeownership homes, with priority to families on the N/NE Preference Policy waitlist. The community will be served by five common areas that will be developed with playgrounds, community gardens, picnic or gathering areas. The site has 3 convenient access points to the Peninsula Crossing Trail. The project will complement the neighborhood and create a sense of community, while honoring the natural beauty of the land by incorporating the Heritage tree and other green spaces into the design. A multitude of energy efficiency features are included in the design of the homes to achieve Earth Advantages Net-Zero Energy Ready design standard.

Habitat for Humanity will partner with Proud Ground and First Republic Bank to provide secure and affordable home ownership for low-income households. This partnership consists of First Republic Bank offering affordable 30-year fixed rate loans and Proud Ground providing permanent affordability and lower purchase prices through the Community Land Trust model. Funding sources for the Carey Blvd. project include Metro Bond funding, Interstate Corridor Tax Increment Financing and other public and philanthropic funds. The site is currently in use as a Safe Rest Village for up to three years - construction for this project is likely to begin in 2025.

- **Portland Value Inn**



The Portland Value Inn, owned by Metro and currently used as a shelter by the Joint Office of Homeless Services (JOHS), will be demolished and the site redeveloped into a new five-story, wood frame building. The site is conveniently located within walking distance of high frequency bus lines, parks, schools, and the library. At completion, the project will create a total of 77 units, which include 47 family-sized units (at least two bedrooms), 39 units affordable to households with incomes at 30% AMI or below, and 15 Permanent Supportive Housing (PSH) units. The Portland Value Inn redevelopment will support historically and presently marginalized community members who are at risk of housing instability, families who are formerly homeless, and intergenerational families who want to live near or with each other, with an emphasis on BIPOC community members who are at risk of displacement because of gentrification. In response to local community feedback, CPAH will provide a community room with kitchen, a second flexible community space, lending library, computer stations, and flexible outdoor space with dwarf fruit trees to provide shade and nourishment. Resident Services will be provided by Humanity Assistance Kindness Interculturalism Community Services (HAKI) and CPAH, while Urban League of Portland will provide culturally specific supportive services.

The design of the property is trauma-informed, universally accessible, and sustainable. Funding sources for the residential project include Metro Bond funds, project-based vouchers from Home Forward, and service funding for the Supportive Housing units from JOHS.

- **Barbur Apartments**



Innovative Housing, Inc. will develop 150 units of new construction apartment homes (149 affordable units and one manager’s unit) in a four-story, wood construction building. The Barbur Apartments project will be family-focused housing, including 103 two-, three-, and four-bedroom homes. Nineteen of the family-sized units will have Project-Based Section 8 vouchers to support rents. In an effort to prevent displacement and serve communities of color that are currently living, working, and worshipping in the SW Corridor, IHI’s outreach and service plans focus on immigrant and refugee communities, specifically Muslim and East and North African households. There is a significant Muslim community in this neighborhood—the City’s largest Mosque is located nearby, along with many Muslim religious and service organizations.

To the south and west of the site is a Safeway grocery store, to the south and east is Barbur Blvd with a high-capacity bus line stop within 75 feet, and to the north is a tree line buffer with apartments beyond. The site design provides generous outdoor space, with a large central courtyard and half-court basketball area. Additional outdoor space is provided via common area outdoor decks on floors 2 to 4. Connected to the upper floor decks are “amenity rooms” which will provide indoor amenity space. In addition, the design includes two large community rooms to accommodate a regular after-school program and other on-site programming options, management and resident services offices, space for service partners to use when they meet with clients, two large laundry rooms on the main floor and small laundry rooms on the upper floors, and two large indoor bike rooms. The community engagement process will determine final uses and arrangement of space and amenities.

- **Powellhurst**



Northwest Housing Alternative's Powellhurst Place development will create 65 units for low-income families and those exiting homelessness in the Powellhurst-Gilbert neighborhood. Powellhurst Place is Northwest Housing Alternative's (NHA) 65-unit new construction project in the Powellhurst-Gilbert neighborhood of outer Southeast Portland. Forty-six of the units will be two-bedroom apartments targeting families, and 12 units will be permanent supportive housing (PSH) for people experiencing or at risk of homelessness. Planned amenities include a community room, playground and landscaped courtyard, secure bike parking, Energy Star appliances, and ductless mini-split heating/cooling. Tenants will also benefit from on-site property management and client-centered supportive services provided by Northwest Housing Alternatives and the Native American Rehabilitation Association (NARA). The project will pursue a Gold level certification through the Earth Advantage Multifamily program.

Located on SE 122nd Avenue, Powellhurst is adjacent to TriMet bus lines #10 and #73. Line #73 offers frequent service between the Parkrose/Sumner Transit Center (connecting with MAX Green, Red and Blue lines) and Foster and 94th (with connections to MAX Green line). A few blocks south of Powellhurst is the Springwater Corridor Trail offering close-by open space for cyclists and pedestrians, with access to Gresham to the east and inner Southeast Portland to the west.

- **Dekum Court**



Home Forward will add 147 new affordable units and redevelop 40 existing homes at its family focused Dekum Court property in Concordia. Home Forward will rebuild 40 existing apartments and add 147 new homes at its Dekum Court development, located at NE 27th Avenue and Saratoga Street, with support from Metro Bond funds for the new units. The project will be built in phases to avoid displacing current residents, allowing them to move directly into new units upon completion. Of the 187 new and preserved units, 118 will have two, three or four bedrooms to accommodate a range of family sizes. The redevelopment will eliminate the current on-site

Head Start classroom and build two new classrooms at the nearby Albina Head Start Clegg site, located approximately one-half mile away, increasing the community’s preschool capacity. Home Forward will also set aside a portion of the Dekum Court site for future development by an education partner. Phase 1 completion is anticipated in early 2023 with Phase 2 completion to follow in late 2024.

Planned amenities at Dekum Court include outdoor play spaces, community gardens, and off-street parking. A centralized community center will offer a community room and kitchen, laundry room, staff offices, and other flexible spaces. The property is ideally situated in the amenity-rich Concordia neighborhood, with Faubion Elementary School two blocks away and a Walgreens Pharmacy and New Seasons grocery store approximately one mile away. Dekum Court is served by the #17 and #70 bus lines providing residents with access to inner Northeast/Southeast Portland and Downtown. Also nearby is the #75 bus line offering frequent service to the North Lombard Transit Center (MAX Yellow Line) and Hollywood Transit Center (MAX Red, Blue, and Green Lines)

- **Hattie Redmond Apartments**



Home Forward and the Urban League of Portland will co-develop the Hattie Redmond Apartments for people of color experiencing chronic homelessness. The 60-unit project will also implement the City of Portland’s N/NE Preference Policy giving priority to displaced or longtime residents of north/northeast Portland. Other development team members include SERA Architects and Bremik Construction.

Urban League, an organization that serves and advocates for the African American community in Portland, will rely on its success with their Project HAVEN permanent supportive housing program and will integrate trauma-informed, culturally specific, and client-centered

input into the building design, financing and programming. The on-site services team will include a resident services coordinator, case managers and peer support specialists. Project amenities include common rooms, a community kitchen facility, outdoor areas and other amenities that bring residents together.

The project leverages Metro bonds 5 times with additional funding from Oregon Housing and Community Services (LIHTC), Oregon Health Authority and deferred developer fees.

- **Findley Commons**



Findley Commons is a partnership between Do Good Multnomah, Home First Development and St. Mark's Lutheran Church. The development transformed a large and under-utilized church-owned parking lot into 35 quality, affordable and Permanent Supportive Housing (PSH) units for veterans who are homeless and those at risk of homelessness. Additional development team members and service partners include Doug Circosta, Architect; Beaudin Construction; and National Association of Black Veterans. Building amenities include owner-paid utilities, elevator, community area and service delivery spaces, a bike room, storage, energy-efficient appliances and fixtures, quartz countertops, luxury vinyl plank flooring an outdoor patio and 34 parking spaces.

Metro bonds were leveraged 3.5 times with additional funding from Oregon Housing and Community Services, Meyer Memorial Trust, land donation and private funding.

- **Waterleaf (fka, Riverplace Parcel 3, Phase 2)**





Waterleaf, the second building in a new development by BRIDGE Housing, will provide 178 affordable apartments, ranging from studios to three-bedrooms, directly adjacent to the Vera Apartments in the South Waterfront area of downtown Portland. Other development team members include Ankrom Moisan Architects and Walsh Construction. Impact NW will provide services to families and veterans with very low incomes, including supportive housing services for veterans and individuals experiencing homelessness. Amenities include laundry, conference room and community classroom, community room with kitchen, outdoor courtyard and playground. Car and bike parking are also included.

The project leveraged an additional \$78.5 million in capital funds from Oregon Housing and Community Services (LIHTC), Metro Transit-Oriented Development funds, Prosper Portland and private funding.

- **Aldea at Glisan Landing**



Related Northwest and Immigrant and Refugee Community Organization (IRCO) are partnering to develop 96 units of affordable housing on a Metro-owned site in Montavilla. Aldea at Glisan Landing represents the family housing portion of the larger Glisan Landing development. The family-focused project will target BIPOC, immigrant and refugee households, and intergenerational families. IRCO will provide resident services at the family housing property.

Planned amenities at Aldea at Glisan Landing include a community room and kitchen, laundry room, playground, picnic area, community garden, bike parking, surface parking, and a future planned onsite multicultural preschool. The site is well supported by parks and amenities including Rosemont Bluff Natural Area, the Montavilla Community Center, a grocery store within walking distance, and two frequent-service TriMet bus lines on NE Glisan and NE 82nd Avenue.

- **Beacon at Glisan Landing**



Related Northwest and Catholic Charities are partnering to develop 41 units of affordable housing on a Metro-owned site in Montavilla. The NE 74th Avenue and Glisan Street project will consist of 41 units of Permanent Supportive Housing (PSH). The PSH project targets BIPOC, seniors, and people experiencing homelessness. Catholic Charities will provide case management and services to PSH tenants. The project team is also partnering with Mercy Corps NW to promote small business classes and offer two retail incubator spaces and a café in the ground-floor commercial space. The site is well supported by parks and amenities including Rosemont Bluff Natural Area, the Montavilla Community Center, a grocery store within walking distance, and two frequent-service TriMet bus lines on NE Glisan and NE 82nd Avenue.

- **Dr. Darrell Millner Building**

Dr. Darrell Millner Building (formerly known as 5020 Interstate) will be co-developed and co-owned by Community Development Partners (CDP) and Self Enhancement Inc (SEI). Other development team members include Carleton Hart Architecture, LMC Construction, ALMAR Contracting and Guardian Management and DRCOMM real estate brokerage. The project will serve families and give priority to displaced or longtime residents of north/northeast Portland, especially African American families by implementing the

City of Portland's N/NE Preference Policy. Amenities include a community garden, outdoor play area and courtyard, bike storage, onsite parking and services. A neighborhood-serving commercial space will be located on the ground floor. The project leverages Metro bonds 3.3 times with additional funding from Oregon Housing and Community Services (LIHTC), permanent debt, SDC waivers and deferred developer fees.

- **Albina One**



Albina One is 94 new affordable homes in the Eliot neighborhood developed by Albina Vision Trust and Edlen & Co. The project will prioritize families, as well as displaced or longtime residents of north/northeast Portland under the City's N/NE Preference Policy. Portland Opportunities Industrialization Center + Rosemary Anderson High School will support residents with culturally specific education, mentoring, family support, employment training and career placement. Other development team members include LEVER Architects, Colas Construction and Quantum Residential. Amenities include community rooms on ground floor and top floor, onsite property management, secure bike parking, an outdoor plaza with garden and play areas, and 16 parking spaces.

Metro bonds will be leveraged 3.6 times with additional funding from Oregon Housing and Community Services (LIHTC), Weatherization funds, permanent debt, SDC waivers, deferred developer fees, and other grants and loans.

- **Meridian Gardens**



Meridian Gardens expands Central City Concern’s supportive housing in East Portland, providing recovery-specific housing and services with a peer-delivered service approach for 85 new units. The project will provide single room occupancy and studio apartments to BIPOC individuals and couples experiencing or at risk of homelessness who are in substance use treatment or recovery. On-site culturally specific services will be provided by Puentes, the Imani Center and Flip the Script. Amenities will include common kitchens and community rooms, recovery group rooms, a supportive services office, resident gym and large outdoor courtyard. Other development team members include Ankrom Moisan Architects and Walsh Construction.

The project will leverage Metro bonds 2 times with additional funding from Oregon Housing and Community Services (LIHTC), permanent debt, and deferred developer fees.

- **hollywood HUB**



hollywoodHUB will repurpose the Hollywood Transit Center into family-focused affordable housing for people of color and people with lower incomes. Developed and owned by BRIDGE Housing, the 13-story building will be the first project under TriMet’s transit-oriented development guidelines. In addition to TriMet, other development partners include Holst Architecture, O’Neill Walsh Community Builders, and Try Excellence LLC.

Amenities include a rooftop terrace, community room, meeting space, courtyard, bike and car parking, and on-site services by Hacienda CDC, Immigrant and Refugee Community Organization, Urban Gleaners and others.

The project will leverage Metro bonds 3.5 times with additional funding from Oregon Housing and Community Services (LIHTC), permanent debt, and deferred developer fees.

- **PCC Killingsworth**



Home Forward will bring 84 new affordable homes apartments to the Cully neighborhood, co-located with a new Workforce Development Center operated by Portland Community College. The project will serve larger families and communities of color, including families and youth in the foster care system. On-site services will be provided by the Native American Youth and Family Center. Other development team members include Hacker Architects and O’Neill Walsh Community Builders.

Amenities include a family room, a community kitchen, community computers, large laundry room with healthy food vending machines, secure play spaces for kids of all ages, a bike storage room and easy transit access. Outdoor space includes a dining area, courtyard and an experiential playscape. Through the collaboration with PCC, the site will offer a large public plaza designed to support a farmer’s market and other community activities, a casual amphitheater, Wi-Fi access and parking.

The project will leverage Metro bonds 15 times with additional funding from Oregon Housing and Community Services (LIHTC), permanent debt, and deferred developer fees.

- **Tistilal Village**



Tistilal Village is a redevelopment of an existing housing community by and for Native Americans and BIPOC families. The project will be development and owned by the Native American Youth and Family Center (NAYA) with supportive housing services provided by Native American Rehabilitation Association (NARA) for Native American families coming out of homelessness. Other development team members include Carleton Hart Architecture, Colas Construction, Housing Development Center, DDV Consulting Services and Viridian Management.

Interiors will emphasize trauma informed design approaches including ample sound buffering, clear and simple circulation patterns, plenty of meeting and community spaces, focus on safety at entryways, soothing color palette and direct lines of sight. Native American art will be prominently featured. Outdoor spaces include a play area, seating, community gardens and a plaza. Other amenities include easy bus access, grocery stores, health clinics, parks and a community center within walking distance. Metro bond funds are leveraged 8 times with additional funding from Oregon Housing and Community Services (LIHTC and OAHTC), grants, SDC waivers and deferred developer fees.

- **Garden Park Estates**



Innovative Housing, Inc. will renovate and expand the existing Garden Park Estates, creating and preserving 117 units for low-income households in Southeast Portland’s Powellhurst-Gilbert neighborhood. Garden Park Estates in outer Southeast Portland currently

consists of 62 two-bedroom apartments and one three-bedroom house. Most of the buildings' major systems are now reaching the end of their useful life and the property is in growing need of reinvestment. By better utilizing the generous site, Innovative Housing, Inc. (IHI) will add 54 units, for a total of 117 apartments ranging in size from studios to three bedrooms. The new units will be developed as efficient, well-designed buildings with between nine and eighteen units each, most of them two-story townhouses. The existing units will be substantially rehabilitated into comfortable, energy-efficient apartments. Garden Park's newly configured site will provide lower rent levels and a wider array of unit types than currently offered, including 25 permanent supportive housing (PSH) units for individuals exiting homelessness and additional family-sized units. A phased construction and relocation plan will minimize the impact on existing residents.

Amenities include a children's play area, on-site management offices, laundry room, community/resident services space, and an outdoor amphitheater performance space that will be used by IHI's youth arts program and available to members of the surrounding neighborhood. Garden Park Estates is near two bus lines (the #9 and #17) and three major grocery stores, along with other retail and services to meet the needs of residents. The expansive Powell Butte Nature Park is one mile away.

## SECTION 4: PERMANENT SUPPORTIVE HOUSING

*This section confirms PSH unit commitments in your jurisdiction. PSH is defined as: units using coordinated access systems serving Population A (Extremely low-income individuals who have one or more disabling conditions; and are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness). Please confirm the information in Figure 2.*

**Figure 2. Permanent Supportive Housing Commitments**

Project	Total Units	PSH Units	Target Population	Service Partners	Plans to leverage (SHS) Supportive Housing Services funding (Yes/No/TBD)	
					For rental Assistance	For Wraparound Services
FINDLEY COMMONS	35	35	VETERANS	VETERANS ADMINISTRATION, DO GOOD MULTNOMAH	NO	NO

HATTIE REDMOND	60	60	PEOPLE DISPLACED FROM ALBINA NEIGHBORHOOD, BIPOC COMMUNITY	URBAN LEAGUE, HOME FORWARD	NO	NO
WATERLEAF	176	20	VETERANS	VETERAN'S ADMINISTRATION	NO	NO
POWELLHURST	64	12	PEOPLE EXITING HOMELESSNESS, BIPOC COMMUNITY	NHA, NARA	NO	YES
TISTILAL VILLAGE	24	16	NATIVE AMERICAN FAMILIES	NAYA, NARA	NO	NO
MERIDIAN GARDENS	85	65	PEOPLE IN SUBSTANCE USE DISORDER TREATMENT, PEOPLE EXPERIENCING CHRONIC HOMELESSNESS	CENTRAL CITY CONCERN	NO	YES
BEACON AT GLISAN LANDING	41	41	BIPOC SENIORS, DOMESTIC VIOLENCE AND SEXUAL ASSAULT SURVIVORS	CATHOLIC CHARITIES	NO	YES
GARDEN PARK ESTATES	54	25	PEOPLE EXITING HOMELESSNESS	INNOVATIVE HOUSING, INC	NO	NO
PORTLAND VALUE INN	96	15	FORMERLY HOMELESS FAMILIES, INTERGENERATIONAL FAMILIES, BIPOC FAMILIES AT RISK OF DISPLACEMENT CAUSED BY GENTRIFICATION, WITH DISABILITIES	URBAN LEAGUE OF PORTLAND, CPAH, HAKI	NO	YES



## SECTION 5: CONTRACTING AND WORKFORCE OUTCOMES UPDATE

Local implementation strategies prioritize racial equity by setting contracting goals for COBID-certified firms and tracking workforce participation in the construction of Metro bond projects. Please review and confirm the information in Figures 3 and 4 and let us know of any changes.

**Figure 3. Equitable contracting goals and outcomes**

Project name	Developer, General contractor	Actual/expected construction completion	Contracting goals		Contracting outcome	
			% of total contract amounts paid to...		% of total contract amounts paid to...	
			Project goal (% hard costs)	Project goal (% soft costs)	Project outcome (% hard costs)	Project outcome (% soft costs)
Hattie Redmond	Home Forward/Bremik	Feb-23	30%	20%	35%	29%
Findley Commons	Home First/Beaudin	Dec-21	24%	20%	19.7%	58.4%
Waterleaf	BRIDGE Housing/Walsh	Dec-22	30%	20%	36%	21.6%
Beacon at Glisan Landing	Related NW/LMC	Sept-24	30%	20%		
Aldea at Glisan Landing	Related NW/LMC	Jan-25	30%	20%		
Dr. Darrell Millner Building	Community Development Partners/LMC	Feb-24	30%	20%		
Albina One	Albina Vision Trust/Colas	Jun-25	30%	20%		
Meridian Gardens	Central City Concern/Walsh	Sept-24	30%	20%		
Hollywood Hub	BRIDGE Housing/O'Neil Walsh	Mar-26	30%	20%		

PCC Killingsworth	Home Forward/O'Neil Walsh	Apr-25	30%	20%		
Tistilal Village	NAYA/Colas	Aug-24	30%	20%		
Powellhurst Place	NHA/LMC	Mar-24	30%	20%		
Garden Park Estates	Innovative Housing/LMC	Apr-25	30%	20%		
Barbur Apartments	Innovative Housing/Todd Construction	Dec-25	30%	20%		
Carey Boulevard	HFHPR	Feb-29	20%			
Carter Commons	UL/NHA	Aug-25	30%	30%		
Portland Value Inn	CPAH	Aug-26	30%	30%		
Strong Site	CDP/SEI	Aug-25	30%	20%		
Abbey Site	CDP/SEI	Feb-25	30%			

For projects that provided a minimum and maximum (or "stretch") goal, please use the "minimum goal."

**Figure 4. Workforce diversity goals/outcomes (as applicable based on LIS and project)**

Project name	Developer, General contractor	Actual/expected Construction completion	Workforce tracking? Y/N	Prevailing wage BOLI, Davis Bacon, N/A	Workforce goals % of total labor hours* worked by...			Workforce outcomes % of total labor hours* worked by...		
					POC	Women	Apprentices	POC	Women	Apprentices
Hattie Redmond	Home Forward/Bremik	Feb-23	Y		18%	9%	20%	55%	9.2%	21%
Findley Commons	Home First/Beaudin	Dec-21	Y	Davis Bacon	30%	15%	20%	42%	0%	18%
Waterleaf	BRIDGE Housing/Walsh	Dec-22	Y	Davis Bacon/BOLI	22%	9%	20%	47%	11.8%	24%

Beacon at Glisan Landing	Related NW/LMC	May-24	Y		22%	9%	20%			
Aldea at Glisan Landing	Related NW/LMC	Aug-25	Y	Davis Bacon	22%	9%	20%			
Dr. Darrell Milner Building	Community Development Partners/LMC	Jan-24	Y	BOLI	22%	9%	20%			
Albina One	Albina Vision Trust/Colas	Jun-25	Y	Davis Bacon/BOLI	22%	9%	20%			
Meridian Gardens	Central City Concern/Walsh	May-24	Y	Davis Bacon	22%	9%	20%			
Hollywood Hub	BRIDGE Housing/O'Neil Walsh	Jul-24	Y	Davis Bacon/BOLI	22%	9%	20%			
PCC Killingsworth	Home Forward/O'Neil Walsh	Dec-25	Y	Davis Bacon/BOLI	22%	9%	20%			
Tistilal Village	NAYA/Colas	Jul-24	Y		22%	9%	20%			
Powellhurst Place	NHA/LMC	Feb-26	Y		22%	9%	20%			
Garden Park Estate	Innovative Housing/LMC	Jul-25	Y	Davis Bacon	22%	9%	20%			
Barbur	Innovative Housing/Todd Construction	Dec-25	Y	Davis Bacon	22%	9%	20%			
Carey Boulevard	HFHPR	Feb-29	Y							
Carter Commons	UL/NHA	Aug-25	Y	Davis Bacon/BOLI	22%	9%	20%			
Portland Value Inn	CPAH	Aug-26	Y							
Strong Site	CDP/SEI	Aug-25	Y		22%	9%	20%			
Abbey Site	CDP/SEI	Feb-25	Y		22%	9%	20%			

*For projects that provided a minimum and maximum (or "stretch") goal, please use the "minimum goal."*

## SECTION 6: ADVANCING EQUITY IN CONSTRUCTION

***Please share progress on equitable contracting and workforce strategies in your jurisdiction. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:***

- a. Progress toward achieving equitable contracting goals*
- b. Progress toward advancing workforce participation through workforce tracking*
- c. Plans to expand local capacity to monitor and report on contracting and workforce outcomes*

The Hattie Redmond project opened in 2023, effectively completing construction and beginning the lease-up process. Final contracting and workforce data for Hattie Redmond and the Waterleaf, which completed construction in 2022, projects are not yet available as both projects are closing out contracts for work performed after receiving their Temporary Certificate of Occupancy. Part of this is due to on-going delays in equipment and material supplies. However, reporting to date demonstrates that both projects are on track to meet and exceed both the equity in contracting and workforce diversity goals.

## SECTION 7: ADVANCING EQUITABLE HOUSING OPPORTUNITY, ACCESS, AND STABILITY

*The Affordable Housing Bond Program is guided by principles that aim to help those left behind by the region's housing market. This includes communities of color, families with children, people with disabilities, seniors, veterans, and those at risk of homelessness or displacement. Each local implementation strategy outlines commitments to affirmative marketing, low-barrier lease-up, culturally responsive resident services and housing stability to those who have experienced displacement or are at risk of displacement.*

***Please share updates on the following, along with any best practices, lessons learned, or opportunities for improvement:***

- a. How project locations support strategies described in your LIS, along with any location priorities for future solicitations (feel free to include a map if you can).*

Following the location priorities described in the Metro Bond Workplan and PHB's LIS, project location criteria include projects located in areas of high opportunity and/or high risk of displacement, proximity to transit, services and resources, as well as geographic diversity to balance Metro Bond investments throughout each "region" of Portland. Excluding Central City and Downtown Portland, project selection through past solicitations had resulted in projects throughout the city other than the Southwest Portland neighborhood. During the M-BOS Last Gap solicitation, Capitol Hill, also known as 'Gooseberry Trails', was selected. This project is located in SW Portland and will provide homeownership opportunities to eligible families.

Project sponsors select development locations based on both market opportunities and criteria that aligns with the sponsor organization's mission or an identified community need. For example, the location for the Carter Commons, Strong Site and Abbey Site and Carey Blvd. projects all demonstrated strong ties to Black history and culture in Portland. These four projects are all located in North Portland. Carter Commons is in lower Albina, the historic neighborhood for Black Portlanders that was home to the highest concentration of African American residents anywhere in the city or state of Oregon.

*b. How projects are incorporating affirmative marketing strategies, partnerships for referral, and low-barrier lease-up.*

To effectively reach the priority populations and to ensure equitable access to communities of color within the priority populations of each project, development teams will employ community-centered approaches for initial lease up and re-leasing efforts that begins with the partner service providers and local relationships. Project sponsors and service partners will also leverage their extensive client networks to whom they can appropriately market housing opportunities.

Following industry best practices and PHB policy, key elements of the tenant selection and screening criteria at each project will be tailored to ensure equitable access among applicants. The project specific screening criteria will be reviewed by PHB's Risk and Compliance team as part of their review of projects' Asset Management Plans to ensure that the screening criteria meets all required fair housing laws, works to advance racial equity, and does not directly or indirectly create disadvantages to the target populations. In addition, projects are expected to set clear and consistent policies to override the screening criteria for credit, rental, and criminal history reviews.

*c. Specific strategies for leasing permanent supportive housing units (e.g. coordinated referrals).*

All projects with Permanent Supportive Housing (PSH) units and using supportive services operating support from the Joint Office of Homeless Services (JOHS) will be required to use Multnomah County's Coordinated Access system for referrals to lease PSH units. Additional referral processes may be used if required by another services funder and approved by JOHS.

*d. Partnerships that align culturally specific/responsive services that meet the needs of residents (Figure 5).*

An on-going requirement of PHB's funding solicitations and project selection criteria, all projects must describe and provide evidence of partnerships and/or internal programs to provide services that are culturally specific and responsive for the project's target populations. Most projects' programming and services target BIPOC communities and/or individuals experiencing homelessness or at risk of homelessness. Project teams include either external, culturally specific partners or plans to provide in-house culturally specific programs to residents onsite. For example, Albina One will prioritize families, as well as displaced or longtime residents of north/northeast Portland under the City's N/NE Preference Policy. Portland Opportunities Industrialization Center + Rosemary Anderson High School will support residents with culturally specific education, mentoring, family support, employment training and career placement.

Another example of this is the Abbey Site, selected in the 2022 Metro Bond and TIF solicitation. Abbey Site, co-owned and co-developed by SEI and CDP, aims to celebrate and strengthen Portland’s historically Black N/NE neighborhoods by providing culturally specific affordable housing, supportive services, and a shared sense of community for underserved individuals and families.

*e. Physical accessibility features (Figure 6)*

**Figure 5. Summary of project plans and partnerships for affirmative marketing and culturally responsive services**

Project name	Who the project seeks to serve	Plans/partnerships for affirmative marketing	Plans/partnerships for culturally responsive services
Hattie Redmond Apts.	BIPOC, homeless singles/couples	Urban League of Portland, N/NE Preference Policy	Urban League of Portland
Dekum Court	BIPOC families	*direct Metro project, no PHB oversight.	*direct Metro project, no PHB oversight.
Findley Commons	Veterans, homeless singles/couples, Asian families	Do Good Multnomah, Dept. of Veterans Affairs, St. Mark’s Lutheran Church	Do Good Multnomah, National Association of Black Veterans
Waterleaf	BIPOC, families, veterans, homeless	Dept. of Veterans Affairs, Latino Network, El Programa Hispano Catolico, Community Vision, Easterseals Oregon, Metropolitan Family Service	Impact NW, Latino Network, El Programa Hispano Católico, SEI, IRCO, NAYA, Iron Tribe, Bridges to Change, Transition Projects

74 <sup>th</sup> & Glisan	BIPOC, seniors, homeless, survivors of domestic violence or sexual assault	Catholic Charities and IRCO programs, Intercultural Counseling Center, Immigration Legal Services, Refugee and Migration Services, Housing Transitions Program	Catholic Charities and IRCO internal programs. Other partnerships TBD.
Aldea at Glisan Landing	BIPOC , immigrant and intergenerational families	Community Vision, Latino Network Family Stability Program, Urban League of Portland, NAYA, Catholic Charities	IRCO
5020 N Interstate	African American families	Self Enhancement, Inc. programs and partnerships; N/NE Preference Policy	Self Enhancement, Inc. programs and partnerships
Albina One	African American and other BIPOC families, single fathers	POIC+RAHS, other local agencies; N/NE Preference Policy	POIC+RAHS, NxNW Health, The OHSU Avel Gordly Center for Healing, Prism Health, Black Parent Initiative

Meridian Gardens	BIPOC, homeless adults/couples in treatment or recovery program	Website, email and fliers. Outreach through partner agencies and Central City Concern's Housing and Employment Advisory Council, and Imani, Puentes, Substance Use Disorder Services (SUDS), and Flip the Script Programs.	Central City Imani, Puentes, SUDS, and Flip the Script Programs; LifeWorks, NARA, Northwest Pilot Project, Portland Rescue Mission, Salvation Army Adult Rehabilitation Center, Transition Projects, Inc.,
hollywoodHUB	BIPOC, immigrant/refugee families	Culturally specific media, Hacienda, IRCO, POIC, APANO, NAACP, Muslim Educational Trust, Self Enhancement, Inc., NW Pilot Project, Urban League, Hispanic Metropolitan Chamber, Asian Health & Service Center	Northeast Community Center, POIC, IRCO, Urban Gleaners
PCC Killingsworth	BIPOC families, youth aging out of foster care	NAYA, Living Cully, PCC Workforce Development Center	NAYA programs and services
Tistilal Village	BIPOC, Native American families, homeless	utilize targeted email distribution lists/channels, calling clients/potential residents, reach out to tribal partners and other BIPOC-led organizations and existing tenants	NAYA, NARA programs and services
Powellhurst Place	BIPOC families	NARA	NARA



Garden Park Estate	Individuals exiting homelessness, families	Innovative Housing Inc.	Innovative Housing Inc.
Barbur	Immigrant, refugee, East African and Muslim households	Priority referrals, relaxed screening criteria, provide housing application educational materials	Islamic Social Services of Oregon (ISOS), Black Parent Initiative (BPI), IRCO, Somali American Council of Oregon (SACOO)
Carey Boulevard	BIPOC families who have displaced through gentrification	Homebuyer fairs, homeownership classes and educational resources, N/NE Preference Policy	Habitat for Humanity
Carter Commons	Seniors, people with disabilities, BIPOC, people exiting homelessness	N/NE Preference Policy	Urban League, The Imani Center, Meals on Wheels
Portland Value Inn	East African refugees and immigrants	Low barrier screening	HAKI, CPAH, Urban League, PCC
Strong Site	BIPOC families	N/NE Preference Policy	SEI, Proud Ground, N/NE Oversight Committee
Abbey Site	BIPOC families	N/NE Preference	SEI, Proud Ground, N/NE Oversight Committee

**Figure 6. Physical accessibility features**

Project name	Number of ground floor units	Number of ADA (Type A) units	Universal design (Y/N)
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## SECTION 8: COMMUNITY ENGAGEMENT TO INFORM PROJECT OUTCOMES

*Jurisdictions prioritize racial equity by engaging people of color and historically marginalized communities in shaping project design and outcomes.*

*Please share a summary of community engagement efforts in 2023 (Figures 7 and 8). Please address:*

*a) WHO was engaged*

- b) *WHAT activities were done*
  - c) *WHAT themes came from the engagement, and*
  - d) *WHAT changes were made in response to project design and/or resident services programming*
- If applicable, describe any partnerships used to support reaching community members.*

**Figure 7. WHO WAS ENGAGED: Summary of community engagement demographics (add rows as needed)**

Project or engagement event	Total participants	Were demographics tracked? (Y/N)	If yes, how many voluntarily reported demographics?	Of those reporting demographics...						
				% people of color	% people with low incomes	% older adults (over 60)	% limited English proficiency	% immigrants and refugees	% existing tenants in building	% people who have experience homelessness
Beacon at Glisan Landing, Aldea at Glisan Landing	97	Y	26	65%			12%	39%		
Albina One	150	Y (excluding Blackburn community meeting)	12	60-65%	100%					
Tistilal	24	Y	23	100%	100%					

**Figure 8. ENGAGEMENT ACTIVITIES, THEMES AND OUTCOMES (add rows as needed)**

<p>WHAT YOU DID</p> <p>Include engagement done by developers/CBOs on all your projects in 2023. List community engagement activities such as “focus group,” “3 listening sessions,” “survey,” etc.</p>	<p>WHAT YOU HEARD</p> <p>Summarize major themes of feedback from each engagement activity, e.g. “more large units,” “more garden space,” “preferred cool exterior colors,” etc.</p>	<p>WHAT YOU CHANGED</p> <p>Summarize what changes were made to project in response to each theme of feedback, e.g. “added 5 more three- and four-bedroom units,” “increased garden space,” etc.</p>
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<p><b>Albina One</b></p> <ul style="list-style-type: none"> <li>• Two-day Afrotopia Pop-Up event, in partnership with Portland Playhouse, on the future site of Albina One, engaging vendors, artists, community partners and the broader community</li> <li>• Consultation POIC + RAHS leadership and program staff</li> <li>• Consultation with Albina Vision Trust Board of Directors</li> <li>• Consultation with Community Investment Plan design team members</li> <li>• Consultation with UO Spatial Justice Fellow (regarding Afro-futuristic design)</li> <li>• Consultation with future property management company</li> <li>• Presentation(s) and discussion with the Eliot Neighborhood Association</li> <li>• Presentation(s) and discussion with the N/NE Oversight Committee</li> <li>• Presentation and discussion with the Historic Albina Advisory Body</li> </ul>	<ul style="list-style-type: none"> <li>• The colors should be vibrant, and the overall building design should reflect principles of “Afro-futurism” – the acknowledgement that Black people will exist and thrive long into the future</li> <li>• Generous community spaces that are inviting and can be flexible in use are important</li> <li>• Exterior spaces need to allow for safe play for children and community building, including programming that includes the broader public</li> <li>• Safety as a key consideration (e.g., lighting, fence, controlled access, and close coordination with property management to manage concerns)</li> <li>• Items to address in the long term: mitigation strategies for the lack of parking and the pursuit of additional wealth building strategies for residents (beyond the baseline stability provided by affordable housing)</li> </ul>	<ul style="list-style-type: none"> <li>• The building includes large balconies that will offer residents incredible views across the river. This is in direct response to feedback from the Community Investment Plan wherein Black youth asked where their “million dollar views” would be within the district</li> <li>• The opportunity for storytelling about Black Portland – past, present and future – were consistently raised. The building incorporates exterior metal screens (to be designed by artists) and other significant opportunities for this storytelling through art</li> <li>• The project team learned that after affordable rents, the biggest barrier to stable housing is the high cost of utilities. As a result, internet will be the only utility residents are responsible for (this may change with future funding opportunities)</li> <li>• Discussions with social service providers also led to the inclusion of laundry in all of the 3-bedroom units and the enclosed outdoor play space near the shared laundry room on the ground floor</li> <li>• Plants selected as part of the landscaping will support children’s ability to explore safely, with preference for edible plants.</li> </ul>
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<ul style="list-style-type: none"><li>• Presentation and discussion with current residents of the adjacent Paramount Apartments</li><li>• Presentation and discussion with the Coalition of African and African American Pastors and Imami</li></ul>		
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<p><b>Meridian Park</b></p> <ul style="list-style-type: none"> <li>• 5 community engagement sessions</li> <li>• Outreach to community groups, neighborhood associations</li> </ul>	<ul style="list-style-type: none"> <li>• community centered design meaning spaces should be useable, easily accessible to all residents, should be welcoming, and encourage relationship</li> <li>• flexibility of community spaces which speaks to being able to use community spaces in various ways to support small groups, quiet time, or a larger class with internet access</li> <li>• Technology was the next theme emphasizing access to wi-fi, possibly computer labs and/or ability to check out web accessible devices.</li> <li>• Safety which is at the end of list but was a major priority of the participants we talked to especially those living in CCC housing. Suggestions made were 24/7 CCC staffing, entry points to buildings that pass by staffed areas, ability for community involvement is safety issues, and trauma informed security with de-escalation skills</li> <li>• feeling supported and having access to staff who are understand of their specific experience</li> <li>• having the space to gather with each other but also a level of privacy to cook food and safe</li> </ul>	<ul style="list-style-type: none"> <li>• incorporated cooktops in single room occupancy units and also added ovens to community rooms to help facilitate group meals and multiple cooking options</li> <li>• shower rooms are private lockable rooms with a shower and a space to change and are located at different places on a floor instead on a one designated area to help with issues around safety.</li> </ul>
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	access to community spaces, such as community showers.	
<b>Tistital</b> <ul style="list-style-type: none"> <li>Several in person community engagement sessions (NARA and NAYA)</li> </ul>	<ul style="list-style-type: none"> <li>Not documented</li> </ul>	<ul style="list-style-type: none"> <li>Designed a detailed plan to solicit feedback on design from current Tistital Village residents, NAYA clients and program participants, NAYA and NARA staff, Native elders and others who can advise in the creation of spaces for culturally specific supportive services, providing modern, high quality, trauma informed design, while incorporating Native American art, and thus creating a space of cultural pride and empowerment.</li> </ul>
<b>Garden Park</b> <ul style="list-style-type: none"> <li>7/1/21 Resident meeting: project overview and introduction to relocation. At this meeting we invited folks to join the Resident Advisory Committee</li> <li>7/1/21 Launch of website</li> <li>8/24/21 Informal Q&amp;A with IHI staff</li> <li>9/21/21 Green charrette hosted by sustainability consultant, Project Pivot</li> <li>11/19/21 Architectural charrette hosted by LRS Architects</li> </ul>	<ul style="list-style-type: none"> <li>Concerns about relocation – both the logistics and what their new units will look like.</li> <li>Discussion about site safety.</li> <li>Parking</li> <li>Residents concerned they will lose that space with the new layout.</li> <li>Feedback specific to design and project amenities was limited and contradictory</li> </ul>	<ul style="list-style-type: none"> <li>The design team has added more cameras and outdoor lighting in response to safety concerns.</li> <li>We are also including gates across the automobile entrances to discourage non-residents to access the site. (The site is currently fenced and will continue to be.)</li> <li>The team is continuing discussions about the feasibility of putting washer dryers in a handful of 2BR units. We have decided to include W/D in the larger 3BR units.</li> <li>Two buildings were moved farther away from the property line to accommodate small future backyard spaces, mimicking some of the areas that residents currently enjoy.</li> <li>The playground has been moved closer to the three-bedroom family units.</li> <li></li> </ul>
<b>Dr. Darrell Millner Building</b> <ul style="list-style-type: none"> <li>Overlook Neighborhood Association (OKNA)</li> </ul>	<ul style="list-style-type: none"> <li>Increased access to culturally specific expertise and staff who “look like us” and understand the local community’s needs,</li> </ul>	<ul style="list-style-type: none"> <li>all of the 2- and 3-bedroom family units in the building plans have been retained.</li> <li>made the decision to maximize the number of 30% AMI units, providing 27% of units as 30% AMI units (exceeding</li> </ul>

<ul style="list-style-type: none"> <li>• Discussions with Portland African American Leadership Forum, the Urban League, Black Parents Initiative</li> <li>• SEI participated in the 2014 community forums</li> <li>• SEI conducts online surveys, hosts in-person and remote community town halls and panel discussions, facilitates focus groups, and shares information on the organization’s website and social media, distributes press releases, and collaborates with local media serving Black and other communities of color, including The Skanner newspaper and the Numberz radio station (e.g., through public service announcements and talk-show interviews).</li> </ul>	<p>strengths, history, norms, and value</p> <ul style="list-style-type: none"> <li>• Increased access to high-quality and culturally responsive and welcoming wraparound support services (e.g., support for education, workforce development, emergency assistance, help in accessing various housing, energy, other assistance)</li> </ul>	<p>PHB’s request of 15%). Providing deeply affordable family units in the neighborhood is a key strategy to meet the policy objectives outlined through prior engagement with N/NE residents and stakeholders.</p>
<p><b>Powellhurst Place</b></p> <ul style="list-style-type: none"> <li>• presented the project concept early in the schematic design phase to interested parties in the surrounding neighborhood as well as to internal Resident Advisory Council, which is a group of residents from various NHA properties we regularly convene for advice on projects, programs, and services.</li> <li>• The neighborhood interested party presentation took place on June 21<sup>st</sup>, 2021 via a remote ZOOM meeting. The meeting information was posted on a project sign onsite and also</li> </ul>	<ul style="list-style-type: none"> <li>• Members voiced their opinions concerning safety and security features, garbage collection plans, and finishing/waterproofing details, which will help inform later stages of the project designs.</li> <li>• importance of creating quality community space with covered outdoor seating, play areas, and flexible indoor space with the ability to accommodate various social gatherings, and laundry facilities that accept multiple forms of payment.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Security</b>- Ensure cameras are placed in all entryways, corridors, parking facilities, bike rooms and laundry facilities. Include wide-angle peepholes in resident doorways. In common spaces like community and laundry room, include relights in doors to allow viewing into the space prior to entry.</li> <li>• <b>Community spaces</b>- Include large screen TV to allow for live streaming of community meetings, high tables for people who prefer to stand, and trauma-informed colors utilizing a softer color palette. Include seating near or in the laundry room as well as a high table and large basin utility sink.</li> <li>• <b>Community art</b>- ensure murals and other artwork connects residents to cultural identity through imagery and medium.</li> </ul>



<p>shared via emails to the Powellhurst Gilbert Neighborhood Association and the East Portland Community Coalition. The attendees provided input about the overall project and helped inform our parking egress/ingress strategy as well as worker access/operations during the construction period.</p> <ul style="list-style-type: none"> <li>• The Resident Advisory Council meeting took place via ZOOM on August 11<sup>th</sup>, 2021. Six longtime residents of different NHA properties attended the meeting, which took members through the conceptual drawings, funding and population targets, planned amenities, etc.</li> <li>• partnered with NARA (Native American Rehabilitation Association) to be permanent supportive housing services</li> </ul>		
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## SECTION 9: INITIAL APPLICATION AND LEASING OUTCOMES

*For projects that are currently leasing or have completed the initial leasing process, please share any progress, lessons learned, or best practices related to application and leasing strategies.*

# Housing Bond Progress Report for Home Forward | 2023

This progress report summarizes how local jurisdictions are carrying out their Affordable Housing Bond strategies. Each year, jurisdictions share progress reports with Metro, which are then reviewed by the Affordable Housing Bond Community Oversight Committee. Metro staff then create a yearly report summarizing progress across all implementing areas.

## SECTION 1: UNIT PRODUCTION AND FUNDING

This section provides a high-level overview of the Affordable Housing Bond projects and units in your jurisdiction, along with plans to leverage SHS funding for rental assistance and/or services. Please review and confirm the information in Figure 1 and let us know of any changes.

**Figure 1. Production progress and resources committed**

Project	Total Project Cost	Metro Bond Funds	Number of BOND ELIGIBLE units <i>(excludes manager units and non-eligible units)</i>					Status	Construction start <i>(anticipated or actual)</i>	Completion
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units	Number of occupants (as of Dec-2022)			
Dekum*	\$ 81,249,000	\$ 21,170,883	147	61	78			Construction	May-22	Jan-25
Troutdale	\$ 45,280,180	\$ 15,213,585	94	39	47			Pre-construction	Jun-24	Sep-24
<b>Total committed or underway</b>		<b>\$ 36,384,468</b>	<b>241</b>	<b>100</b>	<b>125</b>					
<b>LIS commitment</b>		<b>\$37,046,036**</b>	<b>245</b>	<b>107</b>	<b>129</b>					
<b>% of commitment complete</b>		<b>98%</b>	<b>98%</b>	<b>93%</b>	<b>97%</b>					
<b>Remaining for LIS</b>		<b>\$ 661,568</b>	<b>4</b>	<b>7</b>	<b>4</b>					

\*Dekum is reported in PHB’s annual report. Numbers are provided here because the total LIS targets include Dekum. The report below focuses on east county, the area covered by the LIS.

\*\* Home Forward will undergo an IGA amendment to secure an additional \$95,170, as outlined in the Work Plan, bringing the total Metro Bond funding to \$37,141,206.

## SECTION 2: LOCAL IMPLEMENTATION STRATEGIES UPDATE

*Please share how the development plan in your LIS is going. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:*

**a. Results of competitive selections, who was involved and how LIS criteria influenced the outcome.**

- ❖ Home Forward is incorporating bond funds directly in the Troutdale and Dekum projects, eliminating the need for competitive selection processes.

**b. How projects are efficiently using Metro bond funds and other public funding.**

- ❖ Home Forward consistently explores efficient design and construction processes. Troutdale’s design team carefully crafted cost-effective buildings that harmonize with the surrounding neighborhood. The finalized plan comprises three, three-story buildings.

**c. Summarize ongoing commitments for project-based rental assistance and supportive services as well as progress in achieving any PSH goals.**

- ❖ Home Forward will set aside 36 units to serve people at or below 30% AMI. Twenty-five of those units will have SHS regional long term rent assistance vouchers (RLRA).
- ❖ Home Forward will provide a guarantee for the 25 RLRA vouchers to fulfill lender and investor requirements.
- ❖ 11 units will be designated to serve individuals with incomes at or below 30% AMI by using Oregon Affordable Housing Tax Credits to reduce rents, to achieve the 36 total 30% AMI units.
- ❖ Home Forward is talking to El Programa Hispano and IRCO to identify a culturally suitable service provider for resident services.

**d. Summarize impacts of increased construction costs and private activity bond constraints on Metro bond housing projects. Please describe how the jurisdiction is working with developers to ensure housing quality and mitigate risks when projects face cost escalations, unexpected challenges, or delays related to local regulations or the changing funding landscape.**

- ❖ In the Summer of 2023, Home Forward secured Land Use approval after 1 ½ years of effort. From the time of initial construction pricing in summer of 2022 to the most recent permit set pricing in October 2023, construction costs increased by \$2.87M. The land use approval delay was particularly impactful during a time of high cost escalation.

- ❖ The design phase is finished, and building permits were submitted in October 2023. The project received first round of permit comments in late 2023, and is expecting the second round in February 2024 with permit receipt in April 2024. Construction is set to commence in June 2024, aligning with Home Forward’s unit production targets.
- ❖ Home Forward has been actively working to control costs, improve design and secure additional funding sources as the Troutdale project timeline extended due to the protracted Land Use approval process and construction costs continued to rise.
- ❖ We applied for and received 9% tax credits, rather than 4% tax credits, to eliminate the need for Private Activity Bonds. We also received competitive federal funding to help fill gaps. Additionally, Home Forward will support the project with our own CAP Grant funds.

***e. How Supportive Housing Services (SHS) funding is being integrated or leveraged to support outcomes for serving very low-income households and households experiencing or at risk of homelessness.***

- ❖ Home Forward will use SHS RLRA vouchers for 25 units and will guarantee those units with 25 project-based rental assistance vouchers to meet the lender and investor requirements.
- ❖ 11 additional units will serve people with 30% AMI and below by using Oregon Affordable Housing Tax Credits to reduce rents.

***f. Describe the approach and timelines for achieving remaining unit production targets, including any priorities for remaining unit production targets, such as homeownership or supportive housing.***

- ❖ Home Forward’s goal was to meet all the East County Metro bond requirements on one site in Troutdale to be most efficient with funding and create the most housing as quickly as possible. Challenges in meeting unit production goals arose from the unique nature of this single-site project in Troutdale, compounded by various Land Use issues that the project encountered; there was particular community concern and opposition to density, parking, and traffic. Unfortunately, after years of Land Use processes and negotiations with the city of Troutdale we are not able to fully meet the Metro bond targets in East County. We are requesting that all remaining funds be allocated to the Troutdale project to help mitigate construction cost and interest rate increases due to the delay caused by the Land Use processes.

### **SECTION 3: PROJECT HIGHLIGHTS**

*This section is intended to provide a brief overview of each project in the pipeline—and some of the noteworthy features.*

***Please provide a summary of each project in your portfolio, along with an image of the project. Be sure to describe:***

***The Troutdale Project***

**a. *Who the project intends to serve.***

- ❖ Low-income residents, including seniors, people experiencing disabilities, and families with children.

**b. *Project team and partnerships***

- ❖ Developer/Owner- Home Forward
- ❖ Architect- MWA Architect
- ❖ Construction- Bremik Construction
- ❖ Resident Service Partner- Not yet finalized (El Programa Hispano or IRCO)

**c. *Noteworthy features or highlights (e.g., community space, free wi-fi and project amenities)***

- ❖ Buildings are arranged in L-shapes with parking nearby to address Community Advisory Committee input regarding extreme weather and east winds.
- ❖ The community room will serve for classes and resident meetings, offering free WIFI access along with a computer lab and a kitchen.
- ❖ The design incorporates energy-efficient mini-split heat pumps for heating and cooling in all units. In community spaces, a combination of single-zone and multi-zone split system heat pumps will be utilized for effective heating and cooling.
- ❖ Funding has been secured to integrate photovoltaic system (solar panels) into the project, providing solar powered electrical energy.
- ❖ There are two communal laundry rooms accessible to all residents.
- ❖ 5 fully accessible ADA units and 24 fully visitable units

**d. *How projects are incorporating sustainability, climate resilience and AC/cooling strategies to keep people safe***

- ❖ Troutdale's design utilizes mini-split heat pumps which are extremely energy efficient and provide heat and cooling.
- ❖ The photovoltaic system (solar panels) will reduce cost of common area electricity.

**e. *Anything else worth highlighting***

- ❖ A transportation and parking analysis prompted discussions to lower parking ratios in the affordable housing development. The agreement with Home Forward and the city of Troutdale includes 123 parking spaces for residents and allocates 14 parking spaces for public use, catering to downtown businesses.

## Home Forward's Troutdale Project



## SECTION 4: PERMANENT SUPPORTIVE HOUSING

This section confirms PSH unit commitments in your jurisdiction. PSH is defined as: units using coordinated access systems serving Population A (Extremely low-income individuals who have one or more disabling conditions; and are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness). Please confirm the information in Figure 2.

**Figure 2. Permanent Supportive Housing Commitments**

Project	Total Units	PSH Units	Target Population	Service Partners	Plans to leverage (SHS) Supportive Housing Services funding (Yes/No/TBD)	
					For rental Assistance	For Wraparound Services
N/A						

## SECTION 5: CONTRACTING AND WORKFORCE OUTCOMES UPDATE

Local implementation strategies prioritize racial equity by setting contracting goals for COBID-certified firms and tracking workforce participation in the construction of Metro bond projects. Please review and confirm the information in Figures 3 and 4 and let us know of any changes.

**Figure 3. Equitable contracting goals and outcomes**

Project name	Developer, General contractor	Actual/expected construction completion	Contracting goals % of total contract amounts paid to...	Contracting outcome % of total contract amounts paid to...

			Project goal (% hard costs)	Project goal (% soft costs)	Project outcome (% hard costs)	Project outcome (% soft costs)
Troutdale	Home Forward/Bremik	Dec-25	30%	28%		

For projects that provided a minimum and maximum (or “stretch”) goal, please use the “minimum goal.”

**Figure 4. Workforce diversity goals/outcomes (as applicable based on LIS and project)**

Project name	Developer, General contractor	Actual/expected Construction completion	Workforce tracking?  Y/N	Prevailing wage  BOLI, Davis Bacon, N/A	Workforce goals  % of total labor hours* worked by...			Workforce outcomes  % of total labor hours* worked by...		
					POC	Women	Apprentices	POC	Women	Apprentices
				Troutdale	Home Forward/Bremik	Dec-25	Y	Davis Bacon Residential	20%	9%

For projects that provided a minimum and maximum (or “stretch”) goal, please use the “minimum goal.”

## SECTION 6: ADVANCING EQUITY IN CONSTRUCTION

**Please share progress on equitable contracting and workforce strategies in your jurisdiction. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:**

**a. Progress toward achieving equitable contracting goals**

- ❖ Home Forward intentionally selected a construction company that prioritizes the inclusion of MWESB employees through initiatives such as early awareness campaigns, pre-bid outreach, and on-the-job mentoring/training. Consequently, upon choosing Bremik Construction, they proactively initiated the hiring of COBID firms during the MEP design phase, demonstrating a commitment to early COBID participation.

**b. Progress toward advancing workforce participation through workforce tracking**

- ❖ Home Forward not only maintains its own workforce goals, aiming for 20% POC, 9% women, and 20% apprentices, but the construction company, Bremik Construction, has established similar objectives. Additionally, they actively engage in a program that hires high school students to provide them with valuable construction knowledge.



**c. Plans to expand local capacity to monitor and report on contracting and workforce outcomes**

- ❖ Home Forward uses B2Gnow, a common system that is used by other government entities, for monitoring and reporting on contracting and workforce outcomes. This system has proven to be highly effective, and we intend to sustain this approach going forward.

## **SECTION 7: ADVANCING EQUITABLE HOUSING OPPORTUNITY, ACCESS, AND STABILITY**

*The Affordable Housing Bond Program is guided by principles that aim to help those left behind by the region's housing market. This includes communities of color, families with children, people with disabilities, seniors, veterans, and those at risk of homelessness or displacement. Each local implementation strategy outlines commitments to affirmative marketing, low-barrier lease-up, culturally responsive resident services and housing stability to those who have experienced displacement or are at risk of displacement.*

**Please share updates on the following, along with any best practices, lessons learned, or opportunities for improvement:**

**a. How project locations support strategies described in your LIS, along with any location priorities for future solicitations (feel free to include a map if you can).**

- ❖ Home Forward works to site all projects near public transit, jobs, schools, grocery stores and other everyday amenities. Home Forward's geography as the LIS is East Multnomah County. After much research based on amenities and need, Troutdale rose to the top of the 3 major cities. Based on that and the availability of free land from Multnomah County, the Troutdale site was selected.
- ❖ Our project is located within a short walking distance from Troutdale Elementary School, jobs, services, parks and several bus stops. To ensure early and consistent communication, Home Forward lead a Community Advisory Committee (CAC) to get input and provide updates.
- ❖ Bus access will be key to the success of the project. Metro's TOD staff were also invited to participate in the CAC.

**b. How projects are incorporating affirmative marketing strategies, partnerships for referral, and low-barrier lease-up.**

- ❖ Once construction is near complete, Home Forward will work with our property management company and services provider to ensure effective affirmative marketing strategies are being used.
- ❖ Home Forward's Policy and Planning Department, along with the Equity Department, collaborated to address housing accessibility and retention barriers. This effort led to the integration of affirmative marketing strategies and a reduction

in lease-up barriers. Eligibility criteria for were modified, removing categories such as prior evictions and outstanding debts to prior housing providers. The revised criteria also disregard 183 felonies and 241 misdemeanors (making its barrier lower than Portland’s Fair Access in Renting Ordinance). Additionally, a nonpayment of rent policy was adopted and implemented to prioritize housing stability for residents.

**c. Specific strategies for leasing permanent supportive housing units (e.g. coordinated referrals).**

❖ N/A

**d. Partnerships that align culturally specific/responsive services that meet the needs of residents (Figure 5).**

❖ Home Forward is working with El Programa Hispano and IRCO to identify a culturally specific service provider.

**e. Physical accessibility features (Figure 6)**

**Figure 5. Summary of project plans and partnerships for affirmative marketing and culturally responsive services**

Project name	Who the project seeks to serve	Plans/partnerships for affirmative marketing	Plans/partnerships for culturally responsive services
Troutdale	Low-income residents, which includes seniors, people experiencing disabilities, and families with children	Partnering with El Programa Hispano and IRCO to ensure affirmative marketing occurs and culturally appropriate services are provided.	Working with El Programa Hispano and IRCO to find culturally suitable service provider.

**Figure 6. Physical accessibility features**

Project name	Number of ground floor units	Number of ADA (Type A) units	Universal design (Y/N)
Troutdale	23	5	Y

## SECTION 8: COMMUNITY ENGAGEMENT TO INFORM PROJECT OUTCOMES

*Jurisdictions prioritize racial equity by engaging people of color and historically marginalized communities in shaping project design and outcomes.*

*Please share a summary of community engagement efforts in 2023 (Figures 7 and 8). Please address:*

Home Forward's community engagement and resident focus groups were held in 2022. In 2023 Home Forward's engagement focused on Land Use issues.

**a) WHO was engaged**

- ❖ Troutdale City Council and Planning Commission, and other members of the community.

**b) WHAT activities were done**

- ❖ In our 2023 meetings, we passionately concentrated on working with the city to define, apply for and receive Land Use approval. Multiple presentations and Land Use applications were submitted. Community members joined these public meetings, and though our primary goal was to achieve an agreement on Land Use in order to move the project forward; we did not request demographic details of the attendees during these public meetings.

**c) WHAT themes came from the engagement, and**

- ❖ Parking and safety were important issues for Troutdale elected leaders and community members. Through our engagement and a Development Agreement we were able to reach an agreement on Land Use, number of units, how the right of way would be used (an easement rather than a vacation), and public use/space and number of residential and public parking spaces.

**d) WHAT changes were made in response to project design and/or resident services programming**

- ❖ A decrease in the number of units from 94 to 85 and an increase in residential parking spaces and adding 14 public parking spaces.

*If applicable, describe any partnerships used to support reaching community members.*

**Figure 7. WHO WAS ENGAGED: Summary of community engagement demographics (add rows as needed)**

Project or engagement event	Total participants	Were demographics tracked? (Y/N)	If yes, how many voluntarily reported demographics?	Of those reporting demographics...						
				% people of color	% people with low incomes	% older adults (over 60)	% limited English proficiency	% immigrants and refugees	% existing tenants in building	% people who have experience homelessness
Troutdale	~25/meeting	N								

**Figure 8. ENGAGEMENT ACTIVITIES, THEMES AND OUTCOMES (add rows as needed)**

WHAT YOU DID Include engagement done by developers/CBOs on all your projects in 2022. List community engagement activities such as “focus group,” “3 listening sessions,” “survey,” etc.	WHAT YOU HEARD Summarize major themes of feedback from each engagement activity, e.g. “more large units,” “more garden space,” “preferred cool exterior colors,” etc.	WHAT YOU CHANGED Summarize what changes were made to project in response to each theme of feedback, e.g. “added 5 more three- and four-bedroom units,” “increased garden space,” etc.
Four meetings with the city of Troutdale (2 city council and 2 planning commission)	Not supportive of affordable housing on this site; concerns about safety, traffic and insufficient parking (code is 2 spaces/unit)	Reduced number of affordable housing units from 94 to 85; increased parking from original proposal; provided some public parking

## SECTION 9: INITIAL APPLICATION AND LEASING OUTCOMES

*For projects that are currently leasing or have completed the initial leasing process, please share any progress, lessons learned or best practices related to application and leasing strategies.*

N/A

# Housing Bond Progress Report for City of Gresham | 2023

This progress report summarizes how local jurisdictions are carrying out their Affordable Housing Bond strategies. Each year, jurisdictions share progress reports with Metro, which are then reviewed by the Affordable Housing Bond Community Oversight Committee. Metro staff then create a yearly report summarizing progress across all implementing areas.

## SECTION 1: UNIT PRODUCTION AND FUNDING

This section provides a high-level overview of the Affordable Housing Bond projects and units in your jurisdiction, along with plans to leverage SHS funding for rental assistance and/or services. Please review and confirm the information in Figure 1 and let us know of any changes.

**Figure 1. Production progress and resources committed**

Project	Total Project Cost	Metro Bond Funds	Number of BOND ELIGIBLE units <i>(excludes manager units and non-eligible units)</i>					Status <i>Pre-construction, construction, complete</i>	Construction start <i>(anticipated or actual)</i> Month/Year	Completion Month/Year
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units	Number of occupants (as of Dec-2023)			
Wynne Watts Commons	\$45,493,680	\$11,292,447	147	30	31	30		Complete	Jan-21	Jun-22
Rockwood Village	\$68,116,895	\$5,237,814	47	47	39	0		Complete	Jan-20	Apr-22
Terracina Vista	\$43,098,998	\$2,500,000	91	0	56	0		Construction	Dec-23	Mar-25
Oak Row at Rockwood	\$4,180,476	\$2,200,000	11	0	11	0		Pre-construction	Apr-24	Dec-24
<b>Total committed or underway</b>		<b>\$21,230,261</b>	<b>296</b>	<b>77</b>	<b>137</b>	<b>30</b>				
<b>LIS commitment</b>		<b>\$27,140,995</b>	<b>187</b>	<b>77</b>	<b>93</b>					
<b>% of commitment complete</b>		<b>78%</b>	<b>158%</b>	<b>100%</b>	<b>147%</b>					
<b>Remaining for LIS</b>		<b>\$5,910,734</b>	<b>Goal Exceeded</b>	<b>Goal Met</b>	<b>Goal Exceeded</b>					

## SECTION 2: LOCAL IMPLEMENTATION STRATEGIES UPDATE

***Please share how the development plan in your LIS is going. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:***

- a. *Results of competitive selections, who was involved and how LIS criteria influenced the outcome.*
  - Gresham issued RFP 23-16 in January 2023 for the remaining housing bond funds. Gresham needed 23 family sized units to meet LIS production targets. Gresham received nine applications and City Council endorsed four projects to advance for Metro review. Two of the projects are affordable rental and two of the projects are affordable ownership. The projects met all investment criteria, however the selected rental projects (Terracina Vista & Civic Drive Family Housing) maximize family sized-units and the ownership projects (Oak Row at Rockwood & Glisan Street Townhomes) provide affordable buying opportunities for families, which has been a top priority for the community and LIS. The new projects that have received concept endorsement and/or final approval from Metro are Terracina Vista and Oak Row at Rockwood, which provide 67 family sized units thereby exceeding the remaining 23 family sized unit target.
- b. *How projects are efficiently using Metro bond funds and other public funding.*
  - Terracina Vista, a 91-unit rental project, averages \$27,500 per unit while Oak Row at Rockwood, an 11-unit ownership project averages \$200,000 per unit. Combined they represent 102 units of new housing at \$46,000 Metro bond funds per unit. Prior investments in Wynne Watts Commons and Rockwood Village yielded 194 units at approximately \$85,000 Metro bond funds per unit.
- c. *Summarize ongoing commitments for project-based rental assistance and supportive services as well as progress in achieving any PSH goals.*
  - For Wynne Watts Commons, OHCS will be managing the waitlist for Section 811 PRA units and the development team is working with them and the process to ensure that interested applicants can be clearly directed to a Referral Agent or other qualify state/county or other service provider to help and certify the applications to OHCS.
- d. *Summarize impacts of increased construction costs and private activity bond constraints on Metro bond housing projects. Please describe how the jurisdiction is working with developers to ensure housing quality and mitigate risks when projects face cost escalations, unexpected challenges, or delays related to local regulations or the changing funding landscape.*
  - Terracina Vista is a project that needed gap funding due to cost escalations. They met Gresham's LIS and investment criteria, and the City was able to provide \$2,500,000 in housing bond funds to close the gap.
- e. *How Supportive Housing Services (SHS) funding is being integrated or leveraged to support outcomes for serving very low-income households and households experiencing or at risk of homelessness.*
  - N/A

f. Describe the approach and timelines for achieving remaining unit production targets, including any priorities for remaining unit production targets, such as homeownership or supportive housing.

- Gresham has already met and exceeded the unit production targets; however, the City has two additional projects from the latest RFP (not listed in figure 1.) which have yet to receive concept endorsement from Metro. Civic Drive Family Housing is a 59-unit rental project, requesting \$2.1M in bond funds (in addition to \$2.95M in Site Acquisition funds) and is under review for concept endorsement. Glisan Street Townhomes is a 20-unit ownership project, requesting \$3.8M in bond funds but has not yet been submitted for review. Both projects received endorsement from Gresham City Council on 6/6/23. Provided that these projects receive concept endorsement from Metro, Gresham will have spent down its remaining eligible share of housing bond funds. See tables below for more details.

Final RFP Proposals	Sponsor	30% Units	2+bed Units	Total Bond Funded Units	Bond Funds Awarded	Site Acquisition Funds Awarded
Glisan Street Townhomes	Habitat for Humanity	0	20	20	\$3.8M	\$0
Oak Row at Rockwood*	WCHS – Habitat	0	11	11	\$2.2M	\$0
Terracina Vista**	NHA – USA	0	56	91	\$2.5M	\$0
Civic Drive Family Housing	Home Forward	0	59	59	\$2.1M	\$2.95M
<b>Totals</b>	4	0	146	181	\$10.6M	\$2.95M

\*METRO CONCEPT ENDORSEMENT \*\*CONSTRUCTION UNDERWAY

Completed Projects	Target	Achieved	%Achieved
<b>Total Units</b>	187	194	104%
<b>30% Units</b>	77	77	100%
<b>2+ Bed Units</b>	93	70	75%

All Projects	Target	Achieved	%Achieved
<b>Total Units</b>	187	375	200%
<b>30% Units</b>	77	77	100%
<b>2+ Bed Units</b>	93	216	232%



### SECTION 3: PROJECT HIGHLIGHTS

This section is intended to provide a brief overview of each project in the pipeline—and some of the noteworthy features.

**Please provide a summary of each project in your portfolio, along with an image of the project. Be sure to describe:**

- a. Who the project intends to serve.
- b. Project team and partnerships
- c. Noteworthy features or highlights (e.g., community space, free wi-fi and project amenities)
- d. How projects are incorporating sustainability, climate resilience and AC/cooling strategies to keep people safe
- e. Anything else worth highlighting
  - The responses to section 3 are best summarized in the attached project summaries.

### SECTION 4: PERMANENT SUPPORTIVE HOUSING

This section confirms PSH unit commitments in your jurisdiction. PSH is defined as: units using coordinated access systems serving Population A (Extremely low-income individuals who have one or more disabling conditions; and are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness). Please confirm the information in Figure 2.

**Figure 2. Permanent Supportive Housing Commitments**

Project	Total Units	PSH Units	Target Population	Service Partners	Plans to leverage (SHS) Supportive Housing Services funding (Yes/No/TBD)	
					For rental Assistance	For Wraparound Services
WYNNE WATTS COMMONS	147	30	INTELLECTUAL & DEVELOPMENTAL DISABILITIES	ALBERTINA KERR STATE K PLAN SECTION 811 PRA	NO	NO

## SECTION 5: CONTRACTING AND WORKFORCE OUTCOMES UPDATE

Local implementation strategies prioritize racial equity by setting contracting goals for COBID-certified firms and tracking workforce participation in the construction of Metro bond projects. Please review and confirm the information in Figures 3 and 4 and let us know of any changes.

**Figure 3. Equitable contracting goals and outcomes**

Project name	Developer, General contractor	Actual/expected construction completion	Contracting goals % of total contract amounts paid to...		Contracting outcome % of total contract amounts paid to...	
			Project goal (% hard costs)	Project goal (% soft costs)	Project outcome (% hard costs)	Project outcome (% soft costs)
Wynne Watts Commons	Edlen & Co/Pence	Jun-22	20.0%		25.4%	
Rockwood Village	CDP/LMC	Apr-22	20.0%		21.9%	
Terracina Vista	USA/NHA	Mar-25	30.0%	20.0%		
Oak Row at Rockwood	WCHS/HFHPR	Dec-24	20.0%			

For projects that provided a minimum and maximum (or “stretch”) goal, please use the “minimum goal.”

**Figure 4. Workforce diversity goals/outcomes (as applicable based on LIS and project)**

For projects that provided a minimum and maximum (or “stretch”) goal, please use the “minimum goal.”

Project name	Developer, General contractor	Actual/expected Construction completion	Workforce tracking? Y/N	Prevailing wage BOLI, Davis Bacon, N/A	Workforce goals % of total labor hours* worked by...			Workforce outcomes % of total labor hours* worked by...		
					POC	Women	Apprentices	POC	Women	Apprentices
Wynne Watts Commons	Edlen & Co/Pence	Jun-22	N							
Rockwood Village	CDP/LMC	Apr-22	N							
Terracina Vista	USA/NHA	Mar-25	Y	N/A	N/A	N/A	N/A			
Oak Row at Rockwood	WCHS/HFHPR	Dec-24	N							

## SECTION 6: ADVANCING EQUITY IN CONSTRUCTION

***Please share progress on equitable contracting and workforce strategies in your jurisdiction. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:***

*a. Progress toward achieving equitable contracting goals*

- Our investment requirements include minimum 20% COBID targets for development costs and strongly encourage Gresham workforce participation.
- Both completed projects (Wynne Watts Commons, Rockwood Village) exceeded 20% COBID targets.

*b. Progress toward advancing workforce participation through workforce tracking*

- Terracina Vista will track workforce outcomes via GC Walsh.

*c. Plans to expand local capacity to monitor and report on contracting and workforce outcomes*

- N/A

## SECTION 7: ADVANCING EQUITABLE HOUSING OPPORTUNITY, ACCESS, AND STABILITY

*The Affordable Housing Bond Program is guided by principles that aim to help those left behind by the region's housing market. This includes communities of color, families with children, people with disabilities, seniors, veterans, and those at risk of homelessness or displacement. Each local implementation strategy outlines commitments to affirmative marketing, low-barrier lease-up, culturally responsive resident services and housing stability to those who have experienced displacement or are at risk of displacement.*

***Please share updates on the following, along with any best practices, lessons learned, or opportunities for improvement:***

*a. How project locations support strategies described in your LIS, along with any location priorities for future solicitations (feel free to include a map if you can).*

- Gresham's LIS location strategy identified that the overall portfolio of sites should increase choice for residents on where to live. This includes:
  - i. Providing new affordable housing in high opportunity neighborhoods and sites. This would include sites that have good access to educational, economic, and recreational opportunities in addition to access to transit. Development proposals should demonstrate an analysis of these opportunities and community assets in relation to the project area by utilizing resources including the Opportunity Atlas or other tools.
  - ii. Increasing affordable housing in areas with existing underserved diverse populations, including areas with increasing housing cost. For investments in these areas, the project must demonstrate community development opportunities that will increase overall services in the neighborhood. Gresham will support development proposals by providing demographic and socioeconomic data.

- Both Wynne Watts Commons and Rockwood Village are located in areas well-served by transit with a variety of services, including services located on the campuses of both investments. Both projects have light-rail stations within a half-mile. Both projects are adjacent to grocery. Wynne Watts Commons provided street improvements, including sidewalks and bike lanes to improve active transportation.
- Terracina Vista is located in a neighborhood that is largely comprised of communities of color. It is located on the corner of 165<sup>th</sup> and E Burnside, next to the light rail stop. The Latino Network, Rockwood Boys and Girls Club, New Avenues for Youth, and Open School East services campus are all within blocks of the project. Additionally, an elementary school, the El Porvenir Mini Market and the Outside In Medical Clinic are within a short walk.
- Oak Row will be located near the heart of Rockwood Town Center, which has great access to educational, economic and recreational opportunities, as well as transit. Amenities including grocery stores, and pharmacy are all within a half-mile of the site. The project is just over half a mile from Pat Pfeifer Park, which is the largest in Rockwood and includes a baseball diamond, soccer field, playground and forested paths. Nine schools are located within a mile of Oak Row.

*b. How projects are incorporating affirmative marketing strategies, partnerships for referral, and low-barrier lease-up.*

- Wynne Watts Commons is using affirmative marketing practices to market the housing units to communities of color and persons with disabilities per the Affirmative Fair Housing Marketing Plan (AFHMP). Wynne Watts Commons solicits feedback from referring and culturally specific organizations to make desired low barrier screening criteria and leasing processes more responsive to our target populations, notably communities of color and those with disabilities. This additional feedback plan is outlined in the Community Engagement Plan in more detail. The project has more direct outreach and marketing with referral organizations for both of its target populations prior to occupancy to ensure effective outreach and successful lease-up. The management practices include emphasis on low barriers to tenant access. Baseline low-barrier goals will be established for the following criteria and evaluated as needed: lower income-to-rent requirements, identification requirements, lower application fees and deposits, and credit history requirements.
- Rockwood Village marketing and leasing efforts have been centered around prospective residents and their needs, including providing low-barrier screening criteria focused around connections to local service organizations and multilingual resources. The marketing flyers for the property are available in seven different languages, based on the predominant languages of the existing Rockwood / Gresham community. Additionally, Property Management has been utilizing IRCO during leasing appointments with prospective residents as needed, and the Resident Services team with Hacienda has been available to assist residents with translations and the LIHTC paperwork process. The property website can be translated into 100+ languages and leasing forms are available in the online resident portal in just as many languages. In alignment with the

AFHMP, several service organizations with clients in need of housing have received leasing information for the property including Hacienda (co-owner), NAYA, Urban League, Beyond Black, The Rosewood Initiative, APANO and IRCO.

- Terracina Vista will use NHA’s innovative and proven marketing and outreach model designed to serve Communities of Color. NHA’s last project leased up to 60% families of COC. Some of the most significant barriers to housing amongst groups and underrepresented communities is navigation of the application process, cultural and trust concerns, and access to information. NHA will use an analysis of both existing and resident demographics and census data that identifies and markets and groups that are underrepresented and least likely to apply. The project will use various internet media, printed advertising through culturally specific newspapers, property flyers, and physical outreach distributed throughout local surrounding areas. Translation services, language assistance, and standard documentation in several languages will be available. NHA will partner with Hacienda and Black Community of Portland to coordinate these outreach efforts. Furthermore, screening criteria will use lower income to rent ratios, low credit requirements individualized assessments for criminal background and reduced look back periods for criminal convictions. A “review positive” approach to appeals will be used to consider rehabilitation, recovery and supportive services.
- Oak Row will use Habitat for Humanity Portland Region (HFHPR) to source potential buyers. HFHPR partners with culturally specific organizations (CSO) to ensure effective culturally competent outreach to communities of color who are disproportionately in need of affordable housing. These partners include: Bienestar, African American Alliance for Homeownership, Native American Youth and Family Center, Hacienda CDC, Immigration and Refugee Community Organization and Asian Pacific American Network of Oregon. HFHPR affirmatively furthers fair housing goals by prioritizing applications referred by community partners who are CSOs. Over 80% of HFHPR’s homeowner communities are households of color. HFHPR’s program supports homeowners before and after their purchase to ensure generations of stability.

*c. Specific strategies for leasing permanent supportive housing units (e.g. coordinated referrals).*

- For Wynne Watts Commons, OHCS manages the waitlist for Section 811 PRA units and the development team is working with them and the process to ensure that interested applicants can be clearly directed to a Referral Agent or other qualify state/county or other service provider to help and certify the applications to OHCS.

*d. Partnerships that align culturally specific/responsive services that meet the needs of residents (Figure 5).*

- See below.

*e. Physical accessibility features (Figure 6)*

- See below.

**Figure 5. Summary of project plans and partnerships for affirmative marketing and culturally responsive services**

Project name	Who the project seeks to serve	Plans/partnerships for affirmative marketing	Plans/partnerships for culturally responsive services
Rockwood Village	Residents earning below 30% AMI, families	Hacienda, NAYA, Urban League, Beyond Black, The Rosewood Initiative, APANO, and IRCO	Hacienda CDC provides resident services programming
Wynne Watts Commons	Direct support professionals and adults with IDD	Wynne Watts solicits feedback from referring and culturally specific organizations to make low barrier screening and processes more responsive to target populations: communities of color, those with disabilities	Residents can access services from Albertina Kerr as well as Boys and Girls Club
Terracina Vista	Residents earning 60% AMI, families	Hacienda CDC to coordinate outreach efforts with NHA as well as help with initial outreach to external partners	Black Community of Portland will recruit, hire, train and supervise on-site staff for lease-up process and education success programming
Oak Row at Rockwood	Residents earning 35%-80% AMI, families	Habitat for Humanity, Bienestar, African American Alliance for Homeownership, NAYA, Hacienda, IRCO, APANO	Culturally Specific Organizations to provide pre and post purchase counseling

**Figure 6. Physical accessibility features**

Project name	Number of ground floor units	Number of ADA (Type A) units	Universal design (Y/N)
Rockwood Village	34	11	Y
Wynne Watts Commons	36	17	Y
Terracina Vista	20	5	N – units are adaptable
Oak Row at Rockwood	N/A	N/A	N/A

## SECTION 8: COMMUNITY ENGAGEMENT TO INFORM PROJECT OUTCOMES

*Jurisdictions prioritize racial equity by engaging people of color and historically marginalized communities in shaping project design and outcomes.*

*Please share a summary of community engagement efforts in 2023 (Figures 7 and 8). Please address:*

- a) WHO was engaged*
- b) WHAT activities were done*
- c) WHAT themes came from the engagement, and*
- d) WHAT changes were made in response to project design and/or resident services programming*

*If applicable, describe any partnerships used to support reaching community members.*

**Figure 7. WHO WAS ENGAGED: Summary of community engagement demographics (add rows as needed)**

Project or engagement event	Total participants	Were demographics tracked? (Y/N)	If yes, how many voluntarily reported demographics?	Of those reporting demographics...						
				% people of color	% people with low incomes	% older adults (over 60)	% limited English proficiency	% immigrants and refugees	% existing tenants in building	% people who have experience homelessness
Terracina Vista engagement	13+	N								
Oak Row Applications for 11 units	322	Y	100%	75%						

**Figure 8. ENGAGEMENT ACTIVITIES, THEMES AND OUTCOMES (add rows as needed)**

<b>WHAT YOU DID</b> Include engagement done by developers/CBOs on all your projects in 2022. List community engagement activities such as “focus group,” “3 listening sessions,” “survey,” etc.	<b>WHAT YOU HEARD</b> Summarize major themes of feedback from each engagement activity, e.g. “more large units,” “more garden space,” “preferred cool exterior colors,” etc.	<b>WHAT YOU CHANGED</b> Summarize what changes were made to project in response to each theme of feedback, e.g. “added 5 more three- and four-bedroom units,” “increased garden space,” etc.
Terracina Vista Community Meeting, Hacienda Outreach, Neighborhood Organization Housing Subcommittee (2 sessions), NHA Resident Advisory Council.	Need for parking, secure courtyards with play areas, places to gather such as community room, and more family sized units.	Terracina Vista has 56 family sized units (39 three-bed & 17 two-bed) and includes a community space with a community pantry. The unique ‘S’ shape of the building was used to create a variety of protected courtyards. 56 parking spaces available.
1 Oak Row info session held by Habitat at Hacienda office. 2 Oak Row info sessions held by Habitat at Rockwood Village community room.	Desire for on-site parking and community greenspace. Streamlined and transparent applications.	Oak Row has on-site parking for each unit (garage) and open community space for the neighborhood. Revamped application and website to better communicate process and homes available.

## SECTION 9: INITIAL APPLICATION AND LEASING OUTCOMES

*For projects that are currently leasing or have completed the initial leasing process, please share any progress, lessons learned or best practices related to application and leasing strategies.*

- Both completed projects have finished lease-up. Please refer to the initial resident demographic report for Rockwood Village and Wynne Watts Commons for a summary of outcomes.
- Since Gresham’s projects were some of the first to be constructed, there was a bit of a learning curve. Reporting templates were changed after demographic information had already been collected, which made some data requests challenging to comply with. It was difficult to retroactively request information from developers (specifically when templates changed after final reports had already been submitted) and we had had a few requests to re-submit information. In terms of lessons learned and best practices, it would be beneficial to provide training to property managers on how to collect demographic data. Another suggestion would be to align demographic templates with reports that can be pulled through the property management software Yardi, which is aligned with OHCS reporting templates.



# Housing Bond Progress Report for Metro Site Acquisition Program | 2023

*This progress report summarizes how local jurisdictions are carrying out their Affordable Housing Bond strategies. Each year, jurisdictions share progress reports with Metro, which are then reviewed by the Affordable Housing Bond Community Oversight Committee. Metro staff then create a yearly report summarizing progress across all implementing areas.*

## SECTION 1: UNIT PRODUCTION AND FUNDING

*This section provides a high-level overview of the Affordable Housing Bond projects and units in your jurisdiction, along with plans to leverage SHS funding for rental assistance and/or services. Please review and confirm the information in Figure 1 and let us know of any changes.*

**Figure 1. SAP resources committed per jurisdiction**

Project	Partner Jurisdiction	Expended or Disbursed	Committed (Concept Endorsement, Final Approval, or forecast)	Total SAP Share
Elmonica Station	Beaverton	\$76	\$3,459,990	\$3,460,066
Lake Grove	Clackamas	\$2,618,921	\$10,290,867	\$12,909,788
Civic Drive	Gresham	\$18,744	\$2,954,255	\$2,972,999
The Dolores	Hillsboro	\$2,688,592	\$1,828,861	\$4,517,453
Troutdale	Home Forward	\$0	\$1,764,347	\$1,764,347
74th and Glisan (Family)	Portland	\$11,500,000	\$0	\$11,500,000
74th and Glisan (PSH)	Portland	\$0	\$0	\$0
Portland Value Inn at Barbur	Portland	\$4,569,501	\$7,332,006	\$11,901,507
SW 47th and Barbur*	Portland	\$49,224	NA	\$49,224
3140 SW 209th Ave	Washington	\$139,907	\$12,800,708	\$12,940,615

\* Some due diligence complete but acquisition not pursued

**Figure 2. Production progress and resources committed per project**

Project	Partner Jurisdiction	SAP Funding	Number of BOND ELIGIBLE units <i>(excludes manager units and non-eligible units)</i>				Status	Construction start <i>(anticipated or actual)</i>	Completion
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units			
Elmonica Station	Beaverton	\$ 3,460,142	80	33	32	0	Pre-construction	July 2024	Jan 2026
Lake Grove	Clackamas	\$ 12,909,788	54	20	28	10	Pre-construction	May 2025	June 2026
Civic Drive	Gresham	\$ 2,972,999	59	0	59	0	Pre-construction	Feb 2025	May 2026
The Dolores	Hillsboro	\$ 4,517,453	66	30	46	10	Pre-construction	June 2024	Nov 2025
Troutdale	Home Forward	\$ 1,764,347	94	39	47	0	Pre-construction	TBD	24-Oct
74th and Glisan (Family)	Portland	\$ 11,500,000	96	56	63	0	Construction	April 2023	May 2024
74th and Glisan (PSH)	Portland	-	41	41	0	41	Construction	May 2023	May 2024
Portland Value Inn at Barbur	Portland	\$ 11,901,507	98	39	58	15	Pre-construction	April 2025	Sept 2026
SW 47th and Barbur	Portland	\$ 49,224	-	-	-	-	Acquisition not pursued	-	-
3140 SW 209th Ave	Washington	\$ 2,945,500	86-100	TBD	TBD	TBD	Pre-construction	TBD	TBD
<b>Total committed or underway</b>		<b>\$ 10,554,195</b>	<b>529</b>	<b>258</b>	<b>274</b>				

All SAP funds for unincorporated Multnomah County have been transferred to Home Forward for use in the Troutdale project. SAP staff have no involvement in that project and will not report on any items in subsequent sections. The remaining funds will be disbursed when the project closes.

## **SECTION 2: LOCAL IMPLEMENTATION STRATEGIES UPDATE**

***Please share how the development plan in your LIS is going. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:***

- a. Results of competitive selections, who was involved and how LIS criteria influenced the outcome.*
- b. How projects are efficiently using Metro bond funds and other public funding.*
- c. Summarize ongoing commitments for project-based rental assistance and supportive services as well as progress in achieving any PSH goals.*
- d. Summarize impacts of increased construction costs and private activity bond constraints on Metro bond housing projects. Please describe how the jurisdiction is working with developers to ensure housing quality and mitigate risks when projects face cost escalations, unexpected challenges, or delays related to local regulations or the changing funding landscape.*
- e. How Supportive Housing Services (SHS) funding is being integrated or leveraged to support outcomes for serving very low-income households and households experiencing or at risk of homelessness.*
- f. Describe the approach and timelines for achieving remaining unit production targets, including any priorities for remaining unit production targets, such as homeownership or supportive housing.*

### **Portland**

Metro, Portland Housing Bureau, and Related NW began construction on the 74<sup>th</sup> and Glisan Family and PSH buildings in the spring of 2023. Together with a third parcel that will be developed into a multi-cultural preschool by IRCO, the 137-unit, 1.65 acre project is named Glisan Landing. The 41-unit PSH building is now called the Beacon at Glisan Landing and is partially supported through SHS funds through Multnomah County. The 96-unit family building is now officially called the Aldea at Glisan Landing. Both projects should be complete in the spring or early summer of 2024. Closing on the Aldea was delayed due to an unanticipated BOLI prevailing wage determination due to the project's perceived connection to the adjacent and separately financed pre-school and PSH building (which includes ground floor retail). Since the SAP allocation was fixed at \$11.5 million, PHB had to pledge additional funds to close the several million-dollar gap.

The SAP's remaining Portland funds will be used to fund the redevelopment of the Portland Value Inn on Barbur Blvd. Community Partners for Affordable Housing (CPAH) continues through the predevelopment process and anticipates breaking ground in April or May of 2025. This project is not currently in the OHCS development pipeline and does not anticipate receiving an allocation of PAB

until 2025. Without the undersupply of PAB at the state level, the project could potentially close as early as January, 2025. In anticipation of the extended timeline, Metro will amend the existing lease with Multnomah County to allow the site to operate as a temporary shelter until March 2025. A recent City of Portland rezoning of the site instituted a new density minimum of one unit per 500 square feet of site area, which was not considered in CPAH's response to PHB's 2022 NOFA. Thirty-nine units will be supported by project-based Section 8 vouchers and 15 of those units will receive additional supportive housing services funds.

### **Beaverton**

REACH CDC continues through the predevelopment process with the Elmonica Station apartments and anticipates closing in September 2024. Metro acquired the property with TOD Program funds in 2018, prior to passing the Affordable Housing Bond. Metro and the City of Beaverton made the property available as a Site Acquisition Program project after the bond was approved by voters. The project previously received PAB allocation and a modest LIFT award, however a protracted negotiation with Washington County over access rights delayed the project for several months during the land use approval process. This delay occurred during an inflationary period of higher interest rates and increasing construction prices, widening the financial gap necessary to close and start construction. Despite an allocation of PAB, REACH will need to apply for and secure additional LIFT funding from OHCS to close a financing gap of about seven million dollars. However, construction drawings and necessary approvals are nearly complete, so the project should be near shovel ready at the time of the anticipated OHCS NOFA in April 2024.

### **Washington County**

Metro closed on the purchase of a three-acre parcel located at 3140 SW 209<sup>th</sup> Ave in the Aloha area of unincorporated Washington County. The Housing Authority of Washington County (HAWC) will develop approximately 85 – 100 units of family-oriented housing which will skew towards higher bedroom counts that are generally missing from affordable projects in that neighborhood. Metro and HAWC will manage a community engagement process in the first half of 2024 that will inform the building design and programming, while HAWC also procures a general contractor and architect. Whether SHS funds will be incorporated into the project and in what degree will be determined in 2024 as the project advances through the design and predevelopment process. HAWC intends to begin construction in 2025.

### **Gresham**

Gresham and the SAP received five proposals as part of the January 2023 NOFA for the Metro-owned, 1.91 acre property at Gresham Civic Station. From those proposals, Gresham selected Home Forward's concept for family housing as the preferred project and is in the process of submitting materials to Metro for concept endorsement. The project will include 59 units that will range from two to four bedrooms.

### **Hillsboro**

In October 2023, Metro provided concept endorsement to Hacienda CDC's proposal for the Site Acquisition Program's site on 9985-10085 NE Walker Road in Hillsboro. This followed a joint developer selection process led by the City of Hillsboro. The approved concept calls for 66 units, including 46 family sized units. 10 units will be reserved for Permanent Supportive Housing. The project is currently in land use review and HUD environmental review. Construction is currently scheduled to begin in May 2024.

### **Clackamas County**

In September 2023, Metro provided concept endorsement to Hacienda CDC's proposal for the Site Acquisition Program acquired site on West Sunset Drive and Boone's Ferry Road in Lake Oswego. This followed a joint selection process led by Metro and involving the Housing Authority of Clackamas County and the City of Lake Oswego. Hacienda's selection was the culmination of four months of engagement lead by Metro, HACC, and a workgroup of neighbors and community members with experiences similar to those who will live in future housing on the site. The group met six times to develop a statement of values that Hacienda's proposal was evaluated against. The approved concept includes 50 units including 24 family sized units. The project will include 10 units providing PSH services utilizing RLRA vouchers and SHS subsidy from the Housing Authority of Clackamas County. The project is currently in design development and is scheduled to start construction in June 2025.

## **SECTION 3: PROJECT HIGHLIGHTS**

*This section is intended to provide a brief overview of each project in the pipeline—and some of the noteworthy features.*

***Please provide a summary of each project in your portfolio, along with an image of the project. Be sure to describe:***

- a. Who the project intends to serve.*
- b. Project team and partnerships*
- c. Noteworthy features or highlights (e.g., community space, free wi-fi and project amenities)*
- d. How projects are incorporating sustainability, climate resilience and AC/cooling strategies to keep people safe*
- e. Anything else worth highlighting*

### ***Elmonica***



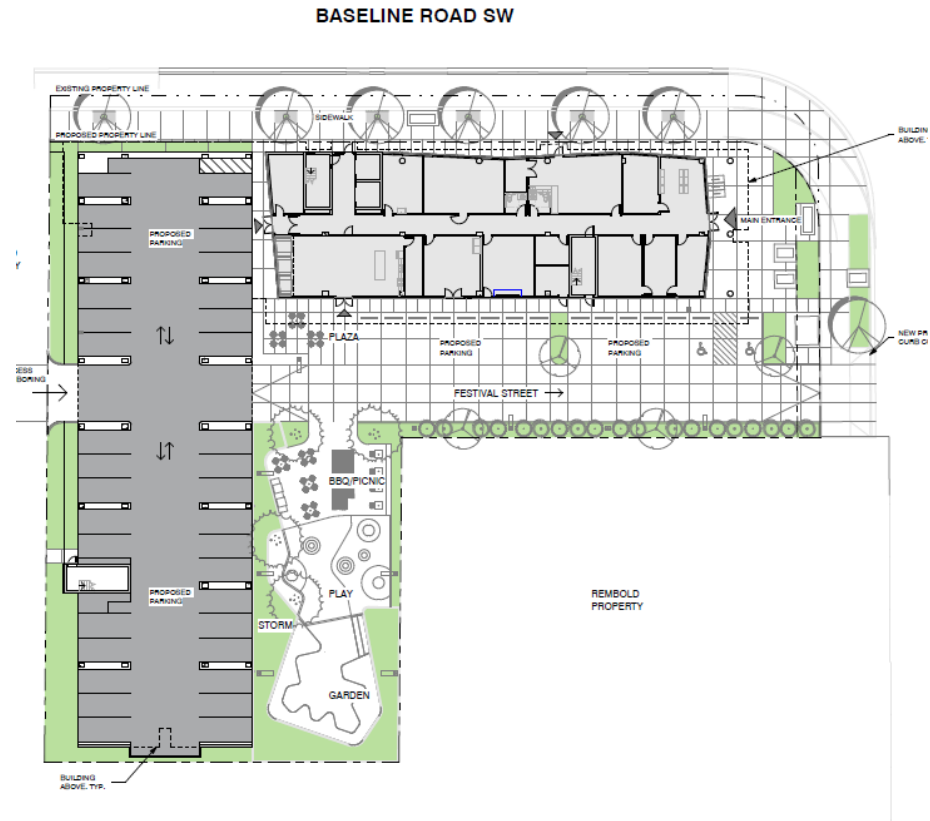
REACH's Elmonica project is a four-story, L-shaped, 81-unit building focusing on filling an unmet demand for multigenerational affordable housing that serves families and single-generation households. The development team convened focus groups made up of residents from other REACH communities and representatives from Bienestar, HomePlate Youth Services, Somali Empowerment Circle and the City of Beaverton to gather their ideas on project design. This process highlighted the importance of outdoor space that fosters community and pride in residence.

As a response to its engagement findings, REACH developed a site plan that included a woonerf to help maximize outdoor areas while also addressing the site's access constraints. Other outdoor amenities include a picnic/lawn area, play structures and a pedestrian walking loop. Indoor areas include a fitness room, full-sized kitchen, bike parking, and a community pantry operated in partnership with the Oregon Food Bank. Laundry rooms will be centrally located with flexible community spaces and play areas.

The proposed 81-unit building includes studios and three-bedroom apartments. REACH proposes placing studio units adjacent to three-bedroom units and using a preference policy to prioritize placement of extended family members within those studios. Sixty percent of the units are studios or one-bedroom units based on the strong preference REACH received for those units through their engagement process. Over 40 percent of the units will be available to households earning 30 percent of Area Median Income (AMI) or below.

The development team includes Colas Construction, Bienestar, and Salazar Architect. Colas is the largest Black-owned construction firm in the Pacific Northwest and has ample experience building affordable housing within the region. Bienestar has a long history of working with Latinx and immigrant communities within Washington County and will be providing services to the residents of the proposed project. Salazar Architects also has a history of designing contemporary and collaborative affordable housing projects, including the recently approved Las Adelitas project in Portland.

### Lake Grove



Metro, the City of Lake Oswego and the Housing Authority of Clackamas County selected Hacienda CDC as the preferred developer of Metro's property at the intersection of Boones Ferry Road and West Sunset Drive in Lake Oswego's Lake Grove neighborhood. Hacienda proposes 54 new affordable units and one manager unit that will include 26 one-bedroom and 25 two-bedroom, and four three-bedroom units. Hacienda plans a courtyard that exceeds the code minimum and that can be programed as play areas, green space, or covered gathering space. This design will keep some of the existing trees on the west side of the site and preserve existing shaded areas for the residents. The project will meet Earth Advantage Gold certification.



Hacienda CDC is an experienced culturally-specific affordable housing development firm that also provides wrap around services. Hacienda has brought on Access Architecture as the architect for the project. Access Architecture is a minority-owned, equity-driven architecture firm that focuses on creating designs based on strong community engagement. Access Architecture is also joined by Mackenzie, which has experience designing projects in Lake Oswego. Colas Construction, a minority-led general contractor, extensive experience building affordable housing in the region. New Narrative will serve as the resident services provider.

## **Civic Drive**





Through a partnership between Home Forward and IRCO, Civic Drive Family Housing will bring deeply affordable housing, early learning classroom space and culturally specific resident services to the Metro-owned parcels offered through Gresham’s Bond Opportunity Solicitation. The proposed unit mix includes 59 new affordable home for families, all with project-based rental assistance from Home Forward, meaning that residents will only pay rents at the 30% AMI level regardless of their income. The project will include a large number of units for larger families, with five 4-bedroom, 42 3-bedroom, and twelve 2-bedroom units.

## **The Dolores**



The SAP's properties at 9985 and 10085 NE Walker Rd. in Hillsboro will be developed by Hacienda CDC into a three-story affordable housing project named the Dolores. The Dolores will include 67 units that will include 20 one-bedrooms, 18 two-bedrooms, 26 three-bedrooms, and three four-bedroom units. Thirty of these units will be reserved for households earning 30 percent AMI or below. New Narrative will manage ten of those units as PSH. LMC will be the general contractor for the building, which will be designed by Access Architecture. Hacienda will be the developer, owner, and resident services provider. Project amenities include air conditioning, a community room, bike room, shared laundry on each floor, and a large courtyard with play area.

The Dolores will be designed to meet or exceed Earth Advantage Gold certification.

## **Aldea at Glisan Landing (74<sup>th</sup> & Glisan Family)**

Related NW in partnership with Immigrant and Refugee Community Organization (IRCO) broke ground on 96 units of family-oriented housing on part of Metro's property at 432 NE 74<sup>th</sup> Ave in Portland. Aldea at Glisan Landing will include studios, one-, two-, three-, and four-bedroom units ranging from 400 SF to 1,200 SF. Income levels will range from 30 percent to 60 percent. The building will be four stories tall and constructed on a concrete podium with 62 parking spaces. IRCO also plans to build a multi-cultural preschool adjacent to the family building on a separate parcel.



Related Northwest is a division of Related California. The company has developed 16,000 residences and has more than 3,000 affordable units in predevelopment in San Francisco, Los Angeles, Irvine and Portland. Related is backed by The Related Companies, L.P. of New York, a privately owned real estate firm with over \$60 billion of assets.

IRCO was founded in 1976 and has over 40 years of experience working with refugee and immigrant communities. IRCO will provide culturally specific family services targeting BIPOC, new arrival families, immigrants, refugees and multi-generational families including seniors. IRCO will also operate the multi-cultural preschool as well as educational classes, translation services and economic programs.

***Beacon at Glisan Landing (74<sup>th</sup> & Glisan PSH)***

Related NW in partnership with Catholic Charities broke ground on Beacon at Glisan Landing, a 41 unit enhanced supportive housing building on the remainder of Metro's property at 432 NE 74<sup>th</sup> Ave in Portland. Beacon will include all studio PSH units that will be supported by project-based vouchers and serve residents earning 30 percent of AMI or below. The project will build off of Catholic Charities' experience managing the Kenton's Women's Shelter and will focus on providing housing for survivors of domestic violence. The ground floor of the building will include a commercial kitchen and retail storefront operated by Stone Soup PDX, which will provide job training to residents and the community at large.

Catholic Charities was founded in 1933 to combat poverty and injustice throughout Western Oregon by operating an array of programs and services to meet the needs of the most vulnerable people in the community regardless of faith. Expanding on their experience operating the Kenton Women's Village, Catholic Charities will provide wraparound services to the 41-unit permanent supportive housing units.

***Portland Value Inn at Barbur***





Community Partners for Affordable Housing (CPAH) and HAKI Community Organization are developing Metro's Portland Value Inn property at 10450 SW Barbur Blvd in Portland. The team will build approximately 98 units on the one-acre property that will serve formerly homeless families and immigrant communities. It will include 17 studios, 23 1-bedroom units, 40 2-bedroom units, 10 3-bedroom units, and eight 4-bedroom units. Planned amenities include a community room with a shared kitchen, a second flexible community space, lending library, computer stations, and flexible outdoor space.

Humanity Assistance Kindness Interculturalism (HAKI) Community Organization will provide resident services along with CPAH. These services will include eviction prevention, job training, community building, and both after school and summer youth programs. Urban League of Portland will provide additional culturally specific supportive services for 15 PSH units in the project.

## SECTION 4: PERMANENT SUPPORTIVE HOUSING

*This section confirms PSH unit commitments in your jurisdiction. PSH is defined as: units using coordinated access systems serving Population A (Extremely low-income individuals who have one or more disabling conditions; and are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness). Please confirm the information in Figure 2.*

**Figure 2. Permanent Supportive Housing Commitments**

Project	Total Units	PSH Units	Target Population	Service Partners	Plans to leverage (SHS) Supportive Housing Services funding (Yes/No/TBD)	
					For rental Assistance	For Wraparound Services
Aldea at Glisan Landing	96	0	Multicultural families	IRCO	No	No
Beacon at Glisan landing	41	41	Populations identifying as women exiting homelessness	Catholic Charities	No	No
Elmonica station	81	0	BIPOC families	Bienestar, homeplate	No	No
Civic Drive	59	0	BIPOC Families	IRCO	No	No
Lake Grove	55	10	Families and individuals exiting homelessness	New Narrative	Yes	Yes
The Dolores	67	10	Individuals exiting homelessness	New Narrative	Yes	TBD
Portland Value Inn at Barbur	98	15	Formerly homeless families and immigrant communities	Urban League of Portland	TBD	TBD

## SECTION 5: CONTRACTING AND WORKFORCE OUTCOMES UPDATE

*Local implementation strategies prioritize racial equity by setting contracting goals for COVID-certified firms and tracking workforce participation in the construction of Metro bond projects. Please review and confirm the information in Figures 3 and 4 and let us know of any changes.*

**Figure 3. Equitable contracting goals and outcomes**

Project name	Contracting goals % of total contract amounts paid to...	Contracting outcome % of total contract amounts paid to...

	Developer, General contractor	Actual/expected construction completion	Project goal (% hard costs)	Project goal (% soft costs)	Project outcome(% hard costs)	Project outcome(% soft costs)
Aldea at Glisan Landing	Related NW + IRCO, LMC/Almar	March 2025 (complete)	35%	30%	31.68% (to date)	TBD
Beacon at Glisan Landing	Related NW + Catholic Charities, LMC/Almar	September 2025 (complete)	35%	30%	36.56% (to date)	TBD
Elmonica Station	REACH CDC, Colas	Fall 2025 (expected)	35%	35%	TBD	TBD
Civic Drive	Home Forward, Bremik	Spring 2026 (expected)	30%	30%	TBD	TBD
Lake Grove	Hacienda CDC, Colas	Summer 2026 (expected)	25%	25%	TBD	TBD
The Dolores	Hacienda CDC, LMC	Spring/Summer 2025	20%	50%	TBD	TBD
Portland Value Inn at Barbur	CPAH + HAKI, Walsh	Spring/summer 2026 (expected)	30%	30%	TBD	TBD

For projects that provided a minimum and maximum (or “stretch”) goal, please use the “minimum goal.”

**Figure 4. Workforce diversity goals/outcomes (as applicable based on LIS and project)**

Project name	Developer, General contractor	Actual/expected Construction completion	Workforce tracking?	Prevailing wage	Workforce goals % of total labor hours* worked by...			Workforce outcomes % of total labor hours* worked by...		
			Y/N	BOLI, Davis Bacon, N/A	POC	Women	Apprentices	POC	Women	Apprentices
Aldea at Glisan Landing	Related NW + IRCO, LMC/Almar	Spring 2024 (complete)	Y	BOLI	22%	9%	20%	TBD	TBD	TBD
Beacon at Glisan Landing	Related NW + Catholic Charities, LMC/Almar	Spring 2024 (complete)	Y	BOLI	22%	9%	20%	TBD	TBD	TBD
Elmonica Station	REACH CDC, Colas	Fall 2025 (expected)	Y	Davis Bacon	NA	NA	NA	TBD	TBD	TBD
Civic Drive	Home Forward, Bremik	Spring 2026 (expected)	Y	N/A	20%	9%	20%	TBD	TBD	TBD
Lake Grove	Hacienda CDC, Colas	Summer 2026 (expected)	Y	N/A	NA	NA	NA	TBD	TBD	TBD
The Dolores	Hacienda CDC, LMC	Spring/Summer 2025	Y	Davis Bacon	25%*	25%*	NA	TBD	TBD	TBD
Portland Value Inn at Barbur	CPAH + HAKI, Walsh	Spring/summer 2026 (expected)	Y	BOLI	TBD	TBD	TBD	TBD	TBD	TBD

For projects that provided a minimum and maximum (or “stretch”) goal, please use the “minimum goal.”

\*The Dolores has a combined workforce goal of 25 percent for women and people of color. The workforce goal for the Portland Value Inn at Barbur will be determined at a later date and included in the final endorsement application.

## SECTION 6: ADVANCING EQUITY IN CONSTRUCTION

***Please share progress on equitable contracting and workforce strategies in your jurisdiction. Please highlight any best practices, lessons learned, or opportunities for improvement. Please address:***

- a. Progress toward achieving equitable contracting goals*
- b. Progress toward advancing workforce participation through workforce tracking*
- c. Plans to expand local capacity to monitor and report on contracting and workforce outcomes*

Metro's SAP works in partnership with Local Implementing Partners to set equitable contracting goals and workforce tracking goals for projects developed on SAP sites. Workforce tracking and contract monitoring are managed by each jurisdiction and not through Metro's SAP. However, the SAP can provide an update on contracting and workforce goals for each project on Metro property.

For the Aldea and Beacon at Glisan Landing, Related NW with LMC/ALMAR Impact Builders and Holst Architecture established a 35 percent minimum goal for COBID-certified hard cost and 30 percent for professional services. Holst is a certified women-owned business enterprise and disadvantaged business enterprise. LMC is partnering with ALMAR Contracting, a BIPOC owned contractor, to help maximize participation from other BIPOC-owned subcontractors. Both Aldea and Beacon are under construction and report COBID goals about on target as of Q4, 2023. Initial workforce demographic reporting is not yet available at the time this report is submitted.

At Elmonica Station, REACH CDC established a 35 percent minimum goal for COBID-certified hard cost and professional services. The team has set an aspirational goal of 50 percent COBID participation for hard costs and 70 percent for professional services. Both the project architect, Salazar, the general contractor, Colas, are COBID certified firms. In addition, Colas is a BIPOC-owned prime contractor with a history of developing a racially equitable and diverse construction workforce.

Colas will also serve as the general contractor for Hacienda CDC's project in the Lake Grove neighborhood of Lake Oswego. Lake Grove established a 25 percent goal of COBID participation for both hard and soft costs. Hacienda CDC's other SAP project, the Dolores in Hillsboro, will include a 20 percent COBID participation goal for hard costs and 50 percent in soft costs.

Home Forward aims to achieve a COBID participation rate of at least 30 percent for both hard and soft costs at Gresham's project at Civic Drive. In addition to the contracting goals, Home Forward's own workforce participation goals require a minimum of 20



percent of construction labor hours be performed by apprentices, and that BIPOC and women workers make up 20 percent and 9 percent of the total hours worked, respectively.

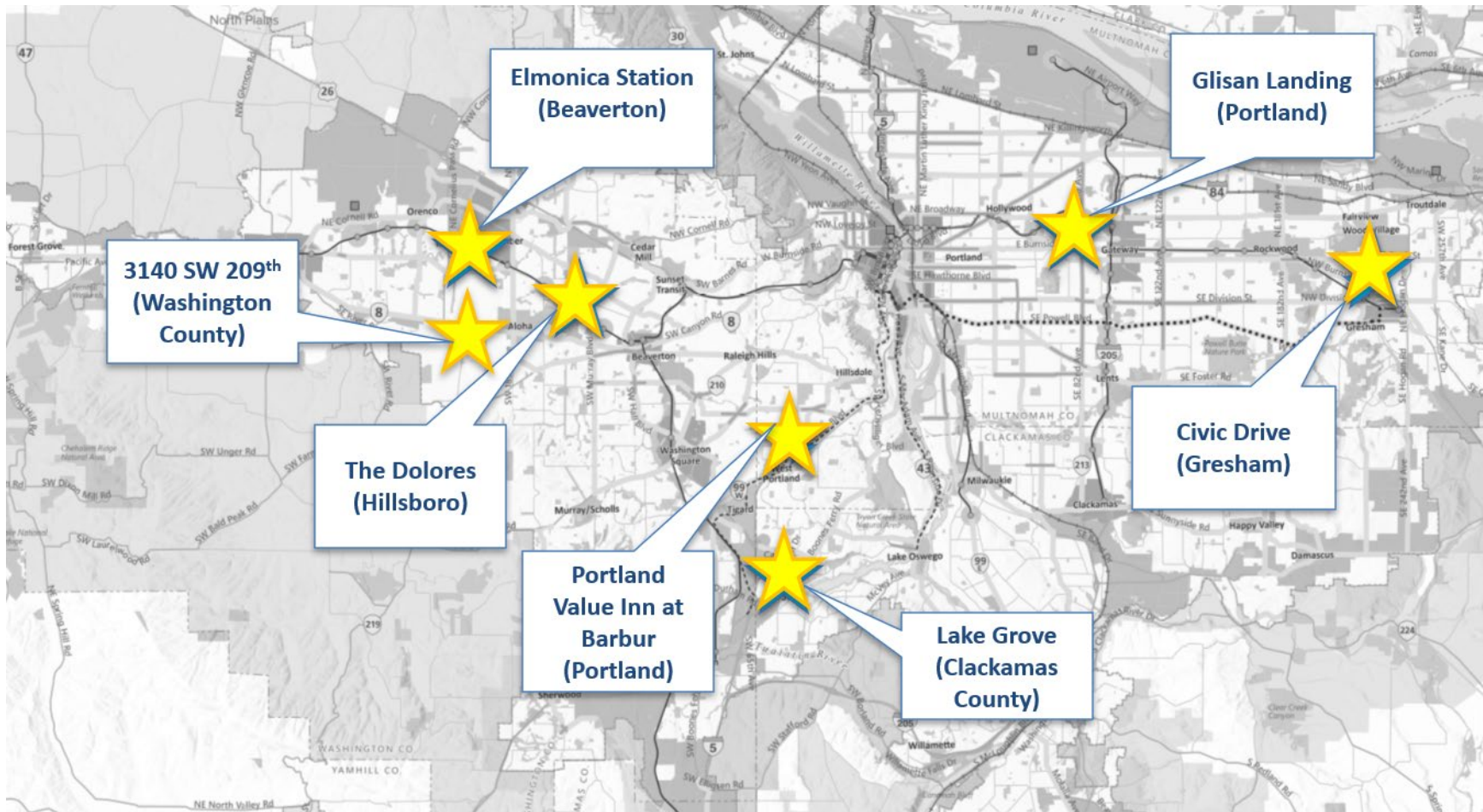
Walsh Construction has partnered with O’Neill Construction, a COBID certified minority owned business, to form Walsh O’Neill Community Builder, which will serve as general contractor for CPAH’s Barbur Portland Value Inn project. CPAH is targeting a 30 percent COBID participation goal for hard and soft costs.

## **SECTION 7: ADVANCING EQUITABLE HOUSING OPPORTUNITY, ACCESS, AND STABILITY**

*The Affordable Housing Bond Program is guided by principles that aim to help those left behind by the region’s housing market. This includes communities of color, families with children, people with disabilities, seniors, veterans, and those at risk of homelessness or displacement. Each local implementation strategy outlines commitments to affirmative marketing, low-barrier lease-up, culturally responsive resident services and housing stability to those who have experienced displacement or are at risk of displacement.*

***Please share updates on the following, along with any best practices, lessons learned, or opportunities for improvement:***

- a. How project locations support strategies described in your LIS, along with any location priorities for future solicitations (feel free to include a map if you can).*
- b. How projects are incorporating affirmative marketing strategies, partnerships for referral, and low-barrier lease-up.*
- c. Specific strategies for leasing permanent supportive housing units (e.g. coordinated referrals).*
- d. Partnerships that align culturally specific/responsive services that meet the needs of residents (Figure 5).*
- e. Physical accessibility features (Figure 6)*



Metro’s Site Acquisition Program seeks to provide affordable housing sites in a geographically distributed manner within each of the eight implementing jurisdictions. The SAP targets properties that will help expand the affordable housing supply in Metro Equity Focus Areas and/or areas with limited existing income-restricted housing. To date SAP has acquired four properties (The Dolores/Walker Road, Portland Value Inn at Barbur, 3140 SW 209<sup>th</sup>, and Lake Grove) and contributed three previously acquired Metro TOD properties (Glisan Landing, Civic Drive, and Elmonica Station). Based on surveys of residential preferences of affordable housing residents in the SAP LIS, Metro has prioritized sites in locations near key amenities including transit, grocery stores, parks, and elementary schools. Metro has also sought to acquire sites in areas at risk of gentrification and displacement such as Barbur

Boulevard in Southwest Portland and northeast Portland, and in locations where there is limited existing affordable housing, such as the Walker Road site in Hillsboro’s Tanasbourne neighborhood, and the Boone’s Ferry Road site in Lake Oswego’s Lake Grove neighborhood. The SAP’s most recent purchase at 3140 SW 209<sup>th</sup> in the Aloha area is near a proposed bus rapid transit line on Tualatin Valley Highway. As part of the transit planning process, the community identified affordable housing as a top priority for the area. Neighborhoods near proposed transit improvements can be at increased risk of future gentrification.

**Figure 5. Summary of project plans and partnerships for affirmative marketing and culturally responsive services**

Project name	Who the project seeks to serve	Plans/partnerships for affirmative marketing	Plans/partnerships for culturally responsive services
Aldea at Glisan Landing	Immigrant families	IRCO, Quantum	IRCO, PDX Urban Gardens, Children’s Book Bank
Beacon at Glisan Landing	Survivors of domestic abuse, women-identifying single households	Catholic Charities / Kenton Women’s Shelter, Quantum	Catholic Charities PSH services, Stone Soup PDX
Lake Grove	Multicultural households and individuals at risk of homelessness	Hacienda CDC, New Narrative	Hacienda CDC’s suite of on-site programs, New Narrative PSH and mental health services
The Dolores	Multicultural households and individuals at risk of homelessness	Hacienda CDC, New Narrative.	Hacienda CDC’s suite of on-site programs, New Narrative PSH and mental health services
Civic Drive	Immigrant families	IRCO	IRCO
Portland Value Inn at Barbur	Formerly homeless families, immigrants and refugees	HAKI, Urban League of Portland	HAKI, Urban League of Portland PSH services
Elmonica Station	Multi-generational families, homeless youth	Bienestar, Homeplate, Somali Empowerment Circle, REACH CDC	Bienestar, Homeplate, Somali Empowerment Circle, REACH CDC

**Figure 6. Physical accessibility features**

Project name	Number of ground floor units	Number of ADA (Type A) units	Universal design (Y/N)
Aldea at Glisan Landing	0	5	Y
Beacon at Glisan Landing	0	5	Y
Lake Grove	14	TBD	Y
The Dolores	17	TBD	Y
Civic Drive	4	TBD	Y

Portland Value Inn at Barbur	17	TBD	Y
Elmonica Station	0	TBD	Y

## SECTION 8: COMMUNITY ENGAGEMENT TO INFORM PROJECT OUTCOMES

*Jurisdictions prioritize racial equity by engaging people of color and historically marginalized communities in shaping project design and outcomes.*

When preparing developer solicitations, SAP has often conducted site specific engagement to supplement the efforts of the local implementation partner. SAP’s approach to engagement typically combines a diverse stakeholder body of 12-24 participants plus a survey focused on low-income households in the surrounding area. Metro has conducted site specific engagement for the Glisan, Portland Value Inn at Barbur, and Lake Grove.

The SAP is working with Unite Oregon and HAWC to convene a new stakeholder group that will guide development of the recent acquisition of 3140 SW 209<sup>th</sup>. Approximately a third of the participants are Spanish speakers with limited English proficiency, so simultaneous interpretation is being provided for each meeting. The group has met two times at the time of this report, and the group will have an opportunity to weigh in several more times before the project is submitted for Concept Endorsement, and again before Final Approval. SAP can report on final demographics in the next annual report as soon as the stakeholder group’s work is complete.

For the Elmonica site, REACH conducted engagement efforts prior to development of the project design. They conducted engagement with residents of REACH’s other properties to develop programming at the Elmonica site. At The Dolores on Walker Road and at Lake Grove, Hacienda CDC is currently managing an engagement process to refine project design elements.

At Civic Drive, Home Forward is currently planning engagement sessions to be led by IRCO. These will involve visits to their satellite locations (Africa House, Greater Middle East Center, Pacific Islander and Asian Family Center, and the Slavic and Eastern European Center) to discuss housing preferences. At the end of these visits additional meetings will show how input will be used in the final designs.

The following tables just include engagement information for activities that occurred in 2023. Please see subsequent annual reports for engagement activities from previous years.

*Please share a summary of community engagement efforts in 2023 (Figures 7 and 8). Please address:*

- a) WHO was engaged*
- b) WHAT activities were done*

- c) WHAT themes came from the engagement, and
  - d) WHAT changes were made in response to project design and/or resident services programming
- If applicable, describe any partnerships used to support reaching community members.

**Figure 7. WHO WAS ENGAGED: Summary of community engagement demographics (add rows as needed)**

Project or engagement event	Total participants	Were demographics tracked? (Y/N)	If yes, how many voluntarily reported demographics?	Of those reporting demographics...						
				% people of color	% people with low incomes	% older adults (over 60)	% limited English proficiency	% immigrants and refugees	% existing tenants in building	% people who have experience homelessness
3140 SW 209 <sup>th</sup> Stakeholder Committee (in process)	20 (estimate)	Y	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD

**Figure 8. ENGAGEMENT ACTIVITIES, THEMES AND OUTCOMES (add rows as needed)**

WHAT YOU DID Include engagement done by developers/CBOs on all your projects in 2023. List community engagement activities such as “focus group,” “3 listening sessions,” “survey,” etc.	WHAT YOU HEARD Summarize major themes of feedback from each engagement activity, e.g. “more large units,” “more garden space,” “preferred cool exterior colors,” etc.	WHAT YOU CHANGED Summarize what changes were made to project in response to each theme of feedback, e.g. “added 5 more three- and four-bedroom units,” “increased garden space,” etc.
Hacienda CDC focus group for The Dolores	Focus on outdoor art and mural locations. Sound attenuation from Walker Road	Working on design concepts and will present later in 2024.

## SECTION 9: INITIAL APPLICATION AND LEASING OUTCOMES

*For projects that are currently leasing or have completed the initial leasing process, please share any progress, lessons learned or best practices related to application and leasing strategies.*

No SAP projects are currently leasing.

The following materials were received  
during the meeting.



Metro

Metro affordable housing bond oversight committee meeting | April 1st, 2024



# Agenda

- Welcome and introductions
- Conflict of Interest Declarations
- Public Comment
- Director Update
- Annual Progress Reports: Portland Housing Bureau, Home Forward, Gresham, and Metro Site Acquisition Program
- Committee discussion and reflection on themes from local presentations



Metro

# Annual Progress Reports

# Questions for local implementation partners

1. Provide an overview of where your jurisdiction is in the process of committing funds and your timeline for committing remaining funds
2. Share an example of a project(s) that has completed construction. What are your lessons learned on:
  - Equitable contracting and workforce participation
  - Affirmative marketing strategies, partnerships for referral and low-barrier lease up
  - Projects that have included Permanent Supportive Housing. Provide a description of the PSH units, % of building, population served, and service providers
3. Share an example of a project(s) in pre-development
  - Share about any known financing issues including the impacts of private activity bonds shortfall, market issues, or gaps. Does the project have a PAB/LIHTC allocation?
  - Share about the impacts of cost escalation on housing quality. How are development partners and jurisdictions solving for cost increases?
4. What are your overall lessons learned on the Metro AHB?



Metro

# Portland Housing Bureau

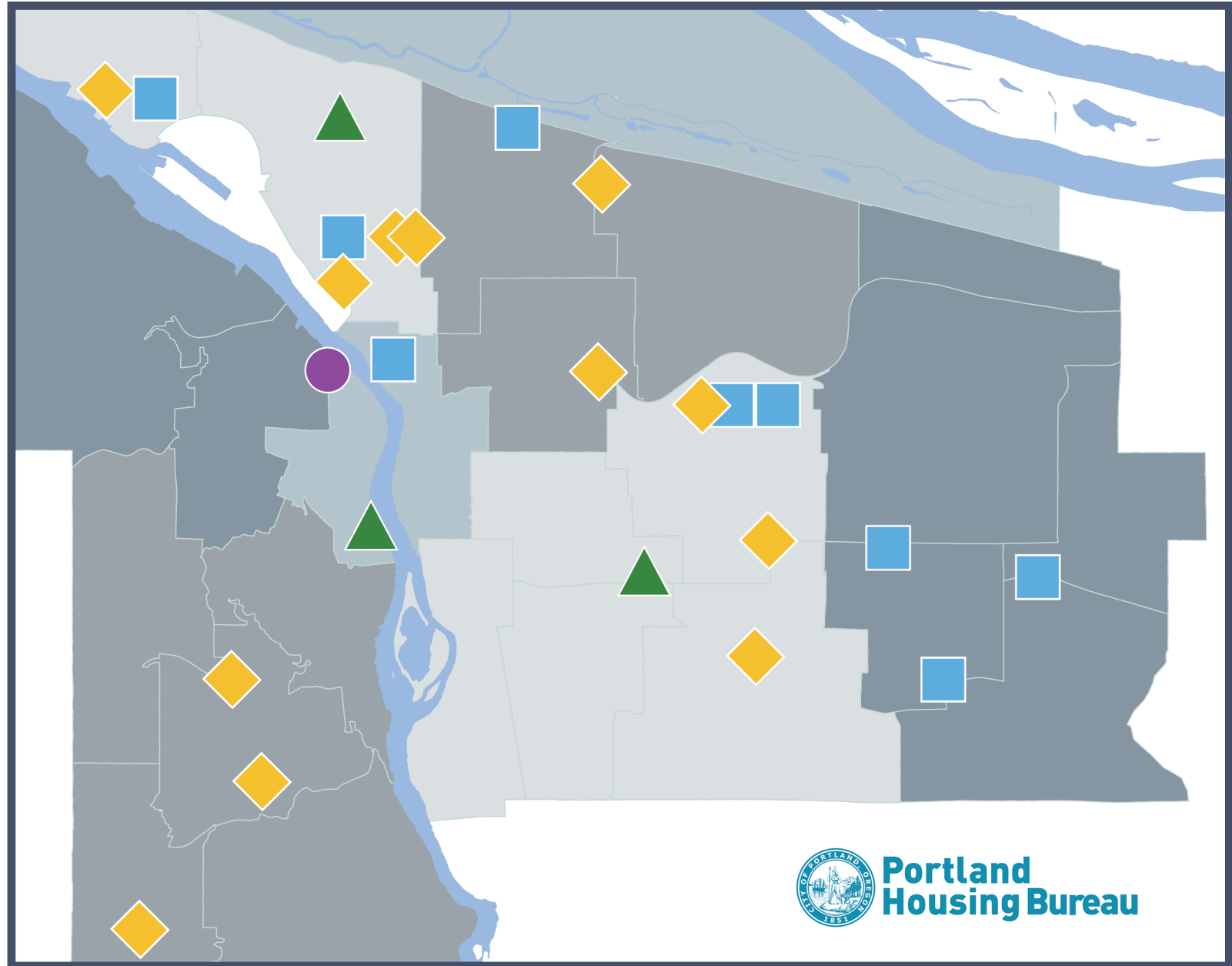


**Portland  
Housing Bureau**

# Metro Bond Oversight Committee

Monday, April 1, 2024

- **\$211 MILLION ALLOCATED TO PORTLAND**
- **1,475 UNIT GOAL**
- **1,787+ UNITS OPEN OR IN DEVELOPMENT**
- **4,700+ PORTLANDERS HOUSED**
- **278 UNITS OPEN**
- **277 UNITS OPENING IN '24**
- **1,232 UNITS EXPECTED IN '25 AND '26**
- **890+ FAMILY-SIZED UNITS**
- **311+ PERMANENT SUPPORTIVE HOUSING UNITS**
- **597+ DEEPLY AFFORDABLE UNITS**
- **\$155M ALLOCATED, OVER \$55M EARMARKED OR RESERVED**



# Remaining under PHB's Metro Bonds



ZGF Architects | Broadway Corridor

<b>Committed to Projects</b>	<b>\$130.3M</b>
<b>2024 Broadway Corridor RFP</b>	<b>\$42.0M</b>
<b>Remaining Funds (incl. Contingency &amp; Admin Fee)</b>	<b>\$27.3M</b>

# Completed Project Highlights

## Hattie Redmond

Project Characteristics, Lease-Up Strategies and Demographics

### Home Forward and Urban League

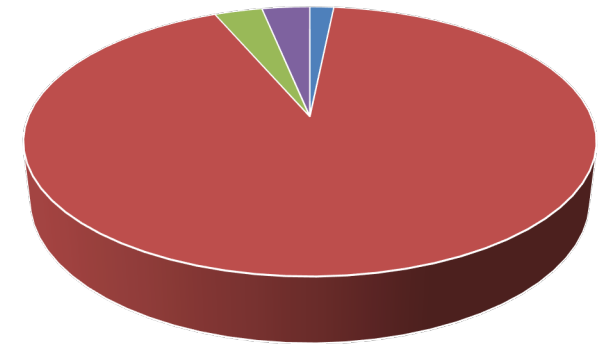
100% PSH

#### Site Amenities Include:

- community room with Wi-Fi access
- laundry facilities
- bike storage
- common kitchen/pantry, outdoor plaza
- dog run
- rooftop terrace



Initial Demographics  
100% BIPOC



- Asian or Asian American
- Black, African American or African
- Hispanic or Latin(a)(o)(x)
- American Indian, Alaska Native or Indigenous

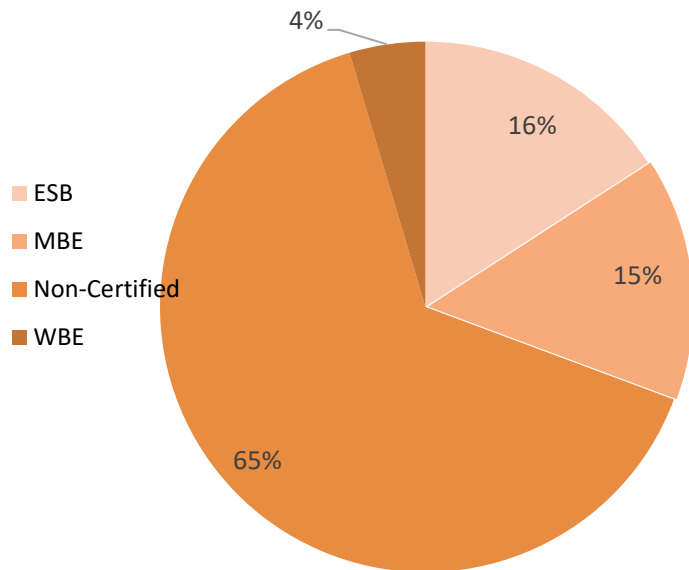


# Completed Project Highlights

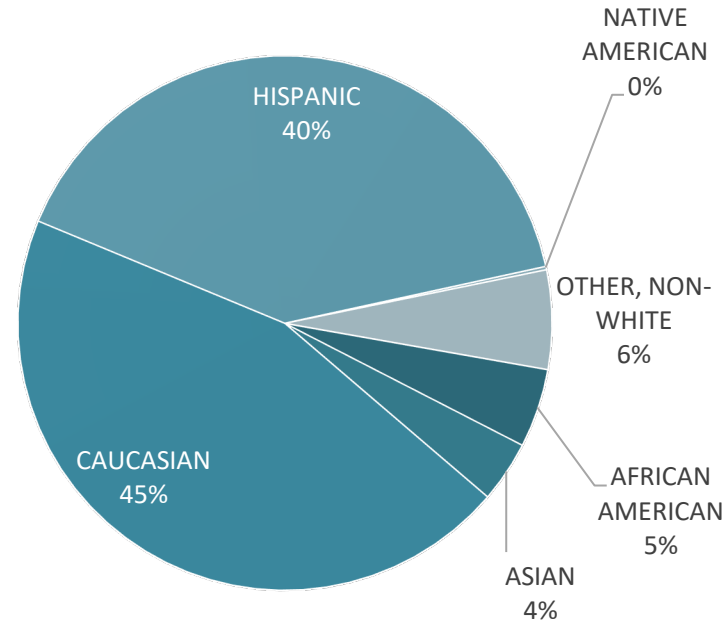
## Hattie Redmond

### Equity and Workforce Goals Outcomes

Total Certified Firm Participation  
(as a % of total hard costs)



Workforce Diversity (by hours)



Percent of Hours Worked by:

<b>Women</b>	<b>9.2%</b>
<b>People of Color</b>	<b>55%</b>
<b>Apprentices</b>	<b>21%</b>

# Pre-Development Project Highlights

## M. Carter Commons

- Northwest Housing Alternatives and Urban League
- 62 units of senior housing in Overlook
- Priority for N/NE Preference Policy Waitlist
- Anticipated start of construction: Early 2025

## Gooseberry Trails

- Habitat for Humanity and Proud Ground
- 52 townhomes, 2–5-bedroom units in SW
- 5 single story fully ADA accessible units, all 52 units visitable
- Anticipated start of construction: Late summer 2024



Salazar Architect



Brett Schulz Architect

# PSH Project Highlight

## Beacon at Glisan Landing

- 41 units in Montavilla at NE 74<sup>th</sup> Avenue and NE Glisan Street
- 100% PSH, targeting BIPOC seniors and people experiencing homelessness
- Service Providers:
  - Catholic Charities - PSH services, case management
  - Stone Soup - barista/culinary training, café on ground floor
- Community room, telehealth room, service offices, food bank, commercial kitchen and café with training space



Holst Architecture

This is an SAP project. **Thank you, Metro, for securing the site and partnering on engagement and goal setting!**

# Thank you!

## Questions?





Metro

# Home Forward



**Home Forward**

**Metro's 2023 Annual  
Report Presentation**

**April 1, 2024**



# The Housing Authority of Multnomah County

- Serves over 15,000 households/month with vouchers
- Owns over 6,500 units of affordable housing
- Systems partner - especially related to homelessness response





# Dekum Courts – 187 Units

\*Left picture: Beginning of phase 2; phase 1 in background





Interior picture of 3BD unit at Dekum

## **Dekum Phase I**

### **A project that has completed construction**

- ❖ Equitable contracting and workforce participation
- ❖ Affirmative marketing strategies, partnerships for referral and low-barrier lease up

Troutdale



# Troutdale



# Lessons Learned

- ❖ Successful at creating new housing that is specific to the needs of each community.
- ❖ Establishing clear goals allowed us to meet our target renter's income and develop diverse unit types.
- ❖ Difficulty working in smaller jurisdictions.
- ❖ Consider a sliding scale for per unit funding allocation based on: unit sizes, unit AMI restrictions, community/commercial uses, location.



**home**forward

**Questions & Answers**

**April 1, 2024**



Metro

# Gresham

# Gresham Funding Commitment

Project	Total Project Cost	Metro Bond Funds	Number of BOND ELIGIBLE units <i>(excludes manager units and non-eligible units)</i>				Status	Construction start <i>(anticipated or actual)</i>	Completion
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units			
Wynne Watts Commons	\$45,493,680	\$11,292,447	147	30	31	30	Complete	21-Jan	22-Jun
Rockwood Village	\$68,116,895	\$5,237,814	47	47	39	0	Complete	20-Jan	22-Apr
Terracina Vista	\$43,098,998	\$2,500,000	91	0	56	0	Construction	23-Dec	25-Mar
Oak Row at Rockwood	\$4,180,476	\$2,200,000	11	0	11	0	Pre-Construction	24-Apr	24-Dec
Myrtlewood Way	\$11,778,782	\$3,800,000	20	0	20	0	Pre-Development	24-Dec	Summer 2025*
Civic Drive Family Housing	\$45,500,309	\$2,100,000	59	0	59	0	Pre-Development	25-Apr	Summer 2026
<b>Total committed or underway</b>		<b>\$27,130,261</b>	<b>375</b>	<b>77</b>	<b>216</b>	<b>30</b>			
<b>LIS commitment</b>		<b>\$27,140,995</b>	<b>187</b>	<b>77</b>	<b>93</b>				
<b>% of commitment complete</b>		<b>99%</b>	<b>200%</b>	<b>100%</b>	<b>232%</b>				
<b>Remaining for LIS</b>		<b>\$10,734</b>	<b>Goal Exceeded</b>	<b>Goal Met</b>	<b>Goal Exceeded</b>				



Metro

# **Metro Site Acquisition Program**



# Metro Affordable Housing Bond Site Acquisition Program

Housing Bond  
Oversight Committee

April 1, 2024

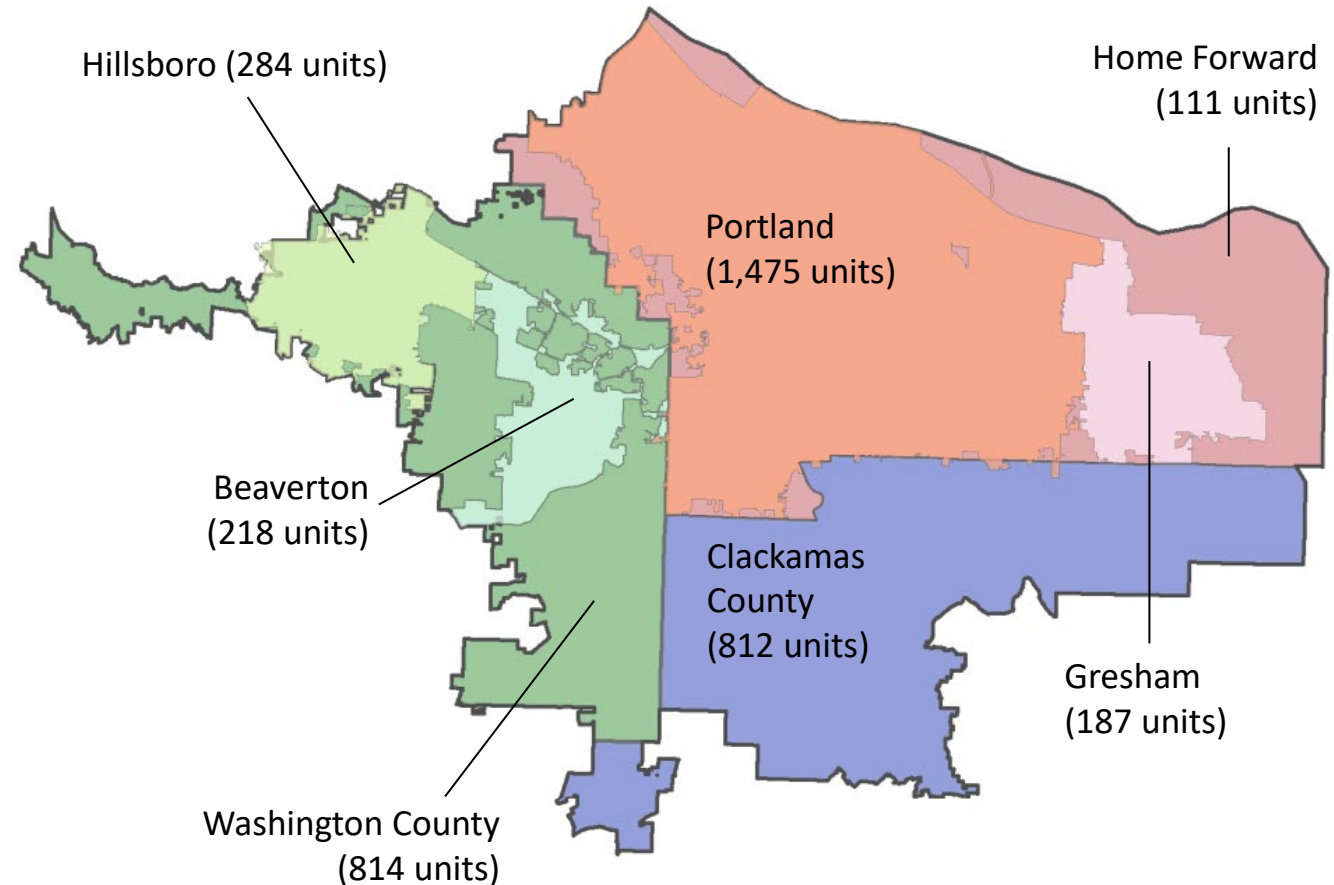


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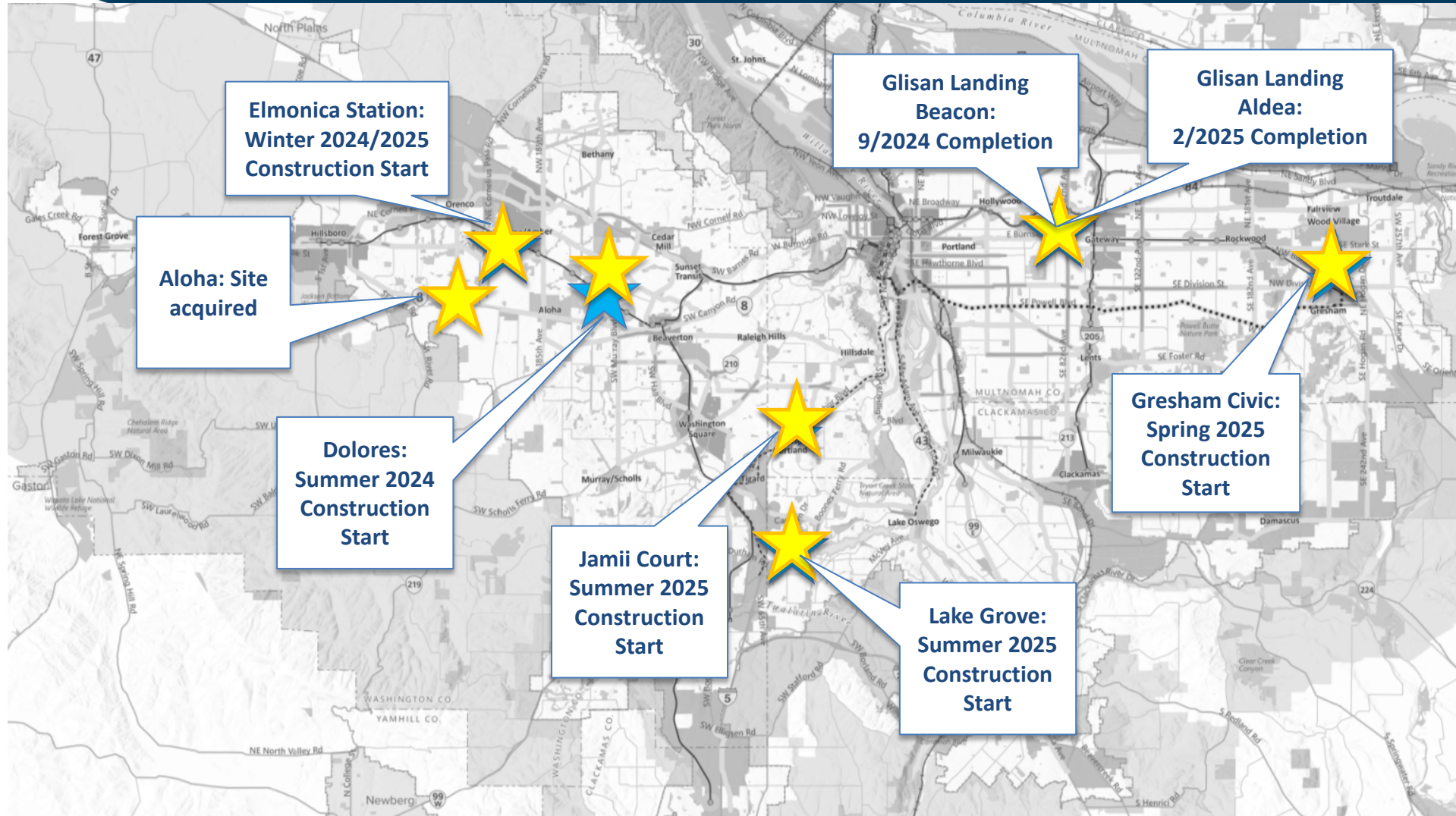
# SAP role in housing bond implementation

Metro's site acquisition program (SAP) administers 10% of housing bond funds

SAP acquires land, engages stakeholders, solicits developers and provides gap financing *in partnership* with local implementing jurisdictions



# Progress to date



# Beaverton: Elmonica Station

- 81-unit project including 8 PSH units and 33 family units (18 2BR, 15 3BR)
- Walkable to Elmonica MAX Station, Beaver Acres & Elmonica Elementary Schools, and Tualatin Hills Park
- Challenge navigating multijurisdictional land use/access approvals



# Portland: Jamii Court

- 96 units including 15 PSH units and 47 family size units (29 2BR, 10 3BR, 8 4BR)
- Interim lease of existing motel to Multnomah County to operate as shelter
- Challenge in transitioning site for redevelopment from shelter use



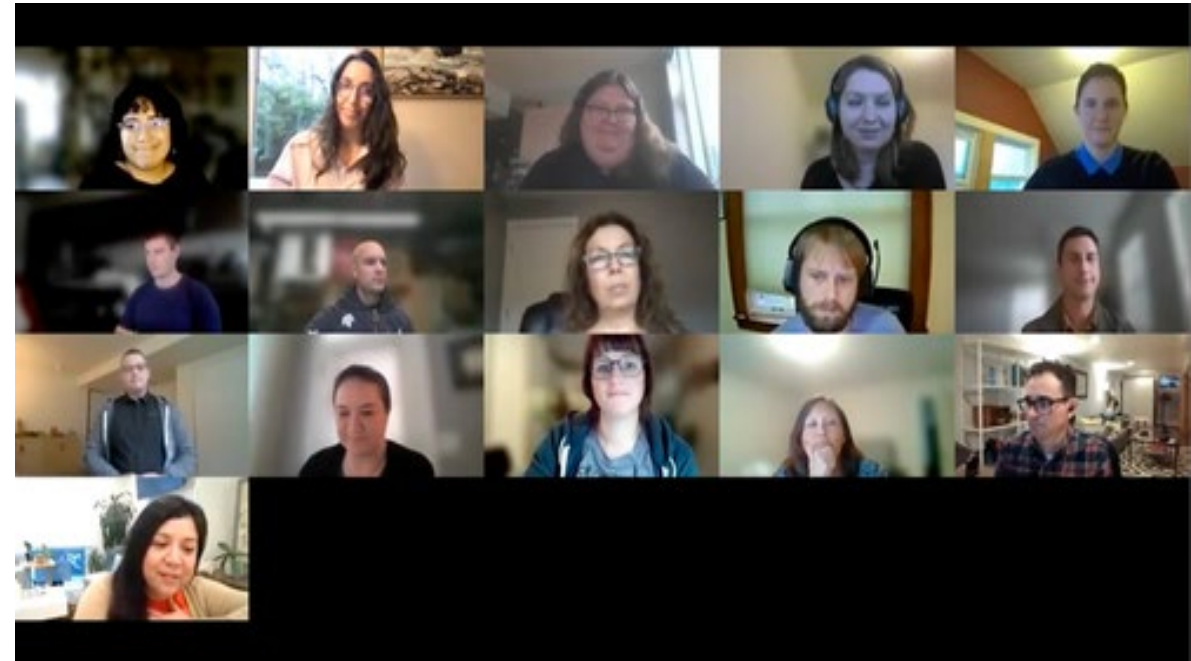
# Clackamas County: Lake Grove

- 55 units including 10 PSH/RLRA units and 27 family sized units (22 2BR and 5 3BR)
- First affordable rental project for families in Lake Oswego's history
- Challenge meeting neighborhood expectations for parking



# Conclusions

- SAP brings affordable housing to strategic locations and broadens the range of developers we can partner with
- PAB limitations are stretching timelines and increasing costs
- Predevelopment costs and entitlements can also challenge community-based developers
- So far, projects with PAB aren't diluting quality, instead seeking more state funding



# Questions

*THANK YOU!*



**oregonmetro.gov**



Zoom Meeting Chat, page 1 of 1

00:40:02 Sandi Saunders, Metro (she/her): Please be sure to change your chat settings to "everyone", not just "host and panelists".

01:55:42 Emily Lieb: DLCDC = Department of Land Conservation and Development

02:03:10 Katherine Rozsa: very helpful