



Metro

600 NE Grand Ave.  
Portland, OR 97232-2736

# Agenda

Meeting: Housing Bond Oversight Committee Meeting  
Date: Wednesday, March 16, 2022  
Time: 9:00 a.m. to 12:00 p.m.  
Place: Virtual meeting ([Zoom link](#))  
Purpose: Discuss implementation progress with four jurisdictions.

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- 9:00 a.m. Welcome and opening remarks
- 9:20 a.m. Public comment
- 9:30 a.m. Annual progress report: Clackamas County
- Discussion prompts for Clackamas County and each jurisdiction that follows
    - *How are you working to ensure that your investments serve households experiencing homelessness? What opportunities are you exploring to expand permanent supportive housing and integrate supportive housing services investments in your portfolio?*
    - *How are you working to ensure low barrier lease up? How are you monitoring lease up to ensure that households with barriers are served?*
    - *How will you make decisions about how to invest air-conditioning funds?*
    - *Additional committee questions/discussion*
- 9:55 a.m. Annual progress report: Washington County
- 10:20 a.m. Break
- 10:30 a.m. Annual progress report: Beaverton
- 10:50 a.m. Annual progress report: Hillsboro
- 11:10 a.m. Panel discussion with local implementation partners
- Discussion prompt: *What challenges and opportunities do you see for your work ahead? What support do you need?*
- 11:40 a.m. Program updates
- Housing bond dashboard and expenditures
- 11:55 a.m. Next steps
- 12:00 p.m. Adjourn

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

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# Meeting minutes

Meeting: Metro Housing Bond Oversight Committee  
Date/time: Wednesday, March 2, 9:30 AM – 12:30 PM  
Place: Zoom Virtual Meeting  
Purpose: Clarity in roles and functions of oversight, understanding of how we center race throughout the work of the committee, and shared understanding of the work ahead for the rest of the year.

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## **Attendees**

Kira Cador, Brandon Culbertson, Co-chair Jenny Lee, Mara Romero, Co-chair Steve Rudman, Andrea Sanchez, Karen Shawcross, Juan Ugarte Ahumada

## **Absent**

Melissa Erlbaum, Mitch Hornecker, Nicole Stingham, Trinh Tran, Tia Vonil

## **Metro**

Ash Elverfeld, Rachael Lembo, Emily Lieb, Jimmy Oporta, Patricia Rojas, Alison Wicks

## **Facilitators**

Allison Brown, JLA Public Involvement; Shilo George, Lush Kumtux Tumtum Consulting

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

## **Welcome and introductions**

Allison Brown, facilitator with JLA Public Involvement, welcomed the Committee. Shilo George provided a land acknowledgement and Allison provided a labor acknowledgment.

Co-chair, Jenny Lee, welcomed members and thanked them for being at the recent racial equity training to get to know each other. Co-chair, Steve Rudman, also appreciated the recent training and thanked folks for being present.

Members confirmed the meeting summary from November 17, 2021.

## **Group agreements introduction activity**

Allison asked the group how they want to be together in the meeting space and a Jamboard was used to take notes. Members and facilitators generated ideas for the day that included the following:

- Mutual respect
- Have patience with each other
- Foster a learning environment
- Being mindful of the amounts of jargon is used
- Be open to non-closure
- Be good public stewards and be respectful of recipients knowing
- Trust those who are doing the work and ask key questions that help us get a full view of the processes

# Meeting minutes

- Tend to impact- within 24 hours, flexibly, to your level of comfort
- Create space for relationships
- Share space, “step up, step up”, step into a talking role, or a listening role; WAIT (Why Am I Talking, Why Aren’t I Talking?)
- Be careful on how we’re privileging different kinds of knowledge- we all bring important perspectives, knowledge and lived experience.

## **Grounding in committee charge and program structure**

Patricia Rojas, Regional Housing Director, Metro, joined the meeting and used a PowerPoint to review the committee charter and role of oversight. A brief conversation occurred between staff and committee members.

Emily Lieb, Affordable Housing Bond Program Manager, Metro, used a PowerPoint to review the affordable housing bond measure framework, structure, guiding principles, and policy goals.

Steve and Jenny provided a brief review of the work of the committee over the last few years.

## **Discussion: Planning for 2022 work plan**

Emily asked the committee to provide feedback on how they would like the presentations from the local implementation partners to go in the next two meetings on March 16 and March 30.

- Meetings should be conversations; partners should not present on information in their report.
- Committee interest in hearing what is and isn’t working for the partners; what challenges are they experiencing and what support do they need
- How are jurisdictions planning to direct additional A/C funding?
- How are partners ensuring that people seeking housing don’t face barriers?

The idea of additional working groups in April were proposed as an option if members felt more time was needed to process information gathered through local progress reports. Members expressed interest in incorporating time after the annual review process, perhaps in June, to reflect on the process and opportunities for improvement. Finally, members also expressed interest in potential site visits in the future.

## **Program updates**

Emily briefly updated the committee on issues related to private activity bonds (PABs). She said that currently there are 19 Metro bond projects amounting to 1,932 units of new affordable housing with funding commitments that are planning to leverage State-controlled Low Income Housing Tax Credits (LIHTCs) and PAB in order to move forward. Of these projects, nine have been approved for 4% LIHTC/PAB and plan to close this spring. The remaining 10 projects have not yet secured 4% LIHTC/PAB reservations and are at risk of delays to their closing timelines, which are scheduled between 2022 and 2023. Additionally, six Metro partner jurisdictions are planning solicitations in 2022 to allocate up to \$222 million in remaining bond funds, and it is anticipated that the future projects will require over \$425 million in PAB capacity in 2023 and 2024.

## **Next steps**

An optional ask-me-anything session is scheduled for March 10, 9:00-10:00 AM.

# Meeting minutes



The next oversight committee meeting is March 16, 9:30 AM-12:30 PM

Allison adjourned the meeting at 12:30 PM.

Minutes respectfully submitted by Ash Elverfeld, Housing Program Assistant, Metro.

# Housing Bond Progress Report for Clackamas County | 2021

*The purpose of this report is to summarize local progress toward implementing local implementation strategies for the Affordable Housing Bond program. At the end of each calendar year, participating jurisdictions submit progress reports to Metro. Reports are reviewed by the Affordable Housing Bond Community Oversight Committee, which is charged with monitoring progress toward unit production and policy goals and ensuring alignment with guiding principles. Metro staff produce an annual report summarizing regional progress across all implementing jurisdictions.*

## SECTION 1: UNIT PRODUCTION AND FUNDING

*This section is intended to provide a summary of projects and units in each jurisdiction's Affordable Housing Bond pipeline and Affordable Housing Bond funding commitments. With the passage of the Supportive Housing Services measure in 2020, many jurisdictions are seeking opportunities to expand unit production, deepen affordability, or increase the number of supportive housing units across the portfolio. With this in mind, we are also tracking plans to leverage SHS funding for rental assistance and/or services.*

***Describe progress toward implementing the development plan in your LIS. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following elements:***

- a. Results of competitive selections, including who was involved and how LIS criteria were applied and impacted the outcome.*
- b. Strategies/outcomes supporting efficient use of Metro bond funds and other sources of public funding in the project; including how projects are responding to increases in LIHTC equity or other additional funding to increase sustainability, durability, and livability for residents, or to reduce the amount of Metro bond subsidy*
- c. Summary of ongoing funding commitments for project-based rental assistance and ongoing supportive services not included within the project's resident services budget; including how Metro 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.*
- d. Approach and anticipated timelines for achieving remaining unit production targets, including any priorities for remaining unit production targets. (e.g., location priorities, homeownership, supportive housing etc.)*

The Housing Authority of Clackamas County (HACC) did not release a competitive selection for Metro bonds in 2021. Instead, HACC focused on moving our Phase 1 project and the three 2020 Bond NOFA projects toward construction closing. Of these four projects, two projects, Fuller Station and Tukwila Springs (fka Webster Road) are currently in construction and the other two projects, Good Shepherd Village and Maple Apartments, have construction closings scheduled for February 28th and May 6<sup>th</sup> 2022, respectively.

The Fuller Station project closed on construction financing in April 2021 and, as a result of increases in LIHTC equity due to the 4% floor, was able to reduce the amount of Metro bond subsidy originally requested by \$1.43MM. The Tukwila Springs

project, which closed in June 2021, reduced its anticipated Metro bond subsidy amount by over \$1.25MM. Both projects incorporate high levels of sustainability, durability, and safety into their design—including providing air conditioning in every unit.

Despite steep increases in construction costs amid pandemic-related construction delays and supply chain issues, Good Shepherd Village and Maple Apartments have not requested additional Metro bond subsidy. Additionally, both projects committed to providing air conditioning in all units—a feature not contemplated in their concept construction budgets, but something the sponsors felt was imperative after the 2021 heat event.

In response to the urgent and growing need for supportive housing in the region, the project sponsors developing Fuller Station, Tukwila Springs, and Good Shepherd Village have each committed to providing additional permanent supportive housing units in their developments. HACC is working with the sponsors on integrating SHS funding to support very low income households and households experiencing or at risk of homelessness. While the details are still being finalized, HACC is hopeful that up to 60 more PSH units will be produced beyond what was originally contemplated.

HACC has also focused on progressing its own Hillside Master Plan Redevelopment project and strategizing ways to provide first-time affordable homeownership opportunities while creating long term affordability through the repositioning of HACC's 145 unit scattered site public housing portfolio. Producing more supportive housing units and creating homeownership opportunities are HACC's top priorities for its remaining bond-supported unit production targets.

HACC is the oldest Housing Authority in the state of Oregon and operates some of the oldest public housing in the country. Hillside Park, completed in Milwaukie in June 1942, was Oregon's first public housing project. The Hillside Park public housing complex is situated on nearly 14 acres and currently consists of eighty-six (86) single story residential apartment buildings containing one hundred (100) dwelling units. In 2019, HACC conducted a Physical Needs Assessment (PNA) which identified that the residential structures are in poor physical condition and require significant rehabilitation and retrofit to render the structures viable for on-going safe and sanitary housing. The PNA concluded that the property warrants consideration for demolition and redevelopment versus rehabilitation based upon the estimated cost of repairs. With the assistance of a Metro 2040 Planning & Development Grant, HACC conducted a comprehensive master planning process to contemplate the future redevelopment of the site. This planning process engaged residents and community members who helped develop a vision for a vibrant mixed-use, mixed-income community. The final Master Plan proposes to demolish and rebuild the existing affordable housing at Hillside Park and provides the opportunity to develop up to 400 units of additional housing, creating opportunities for expanded housing choice and type.

In late 2020, the Authority submitted a land use application to the City of Milwaukie seeking to rezone the site to allow for increased density and mixed-use housing. As a testament to the level of community outreach and communication conducted in support of this development, the project's land use application received no public testimony in opposition when it was brought before city council for adoption. In November 2021, the Authority's land use application was unanimously approved and the final decision on the Planned Development was adopted by Milwaukie City Council.

HACC recently released a developer solicitation seeking conceptual proposals for the redevelopment of the site. This Request for Expressions of Interest (RFEI) sets forth the Authority's intentions for this project, including the selection criteria and selection process. HACC has earmarked approximately 30% of Clackamas County's total Affordable Housing Bond allocation to ensure that a sizable portion of the newly developed units are affordable to households making 80% AMI and below. HACC also plans to integrate SHS funding in order to support supportive housing units within the new development. The first phase of redevelopment is anticipated to break ground in 2023.

HACC has been coordinating with Metro and the City of Lake Oswego on what is expected to be approximately 50 units of bond-funded affordable housing in Lake Oswego. The three agencies are preparing to commence a community process with the goal of developing a guiding vision for the site. This vision statement will be included in a developer RFP expected to be released in the third quarter of 2022.

Finally, HACC has been coordinating with our Housing Advisory Board, culturally-specific service providers, sustainability consultants, and local workforce development agencies to develop HACC's next bond solicitation. HACC expects to release this solicitation mid-2022 with the goal of supporting the development of up to 200 bond-funded units.

**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>				Plans to leverage Supportive Housing Services (SHS) funding <i>(yes/no/TBD)</i>		Status  <i>Concept, final approval, construction, complete</i>	Construction start <i>(anticipated or actual)</i>	Completion
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units	For rental assistance	For wraparound services			
Fuller Road Station	\$47,344,650	\$8,570,000	100	25	83	25	TBD	Yes	In Construction	Apr-2021	Aug-2022
Good Shepherd Village	\$53,902,667	\$18,330,000	143	58	80	35	No	Yes	Final Approval	Feb-2022	Aug-2023
Maple Apartments	\$53,041,069	\$15,903,000	171	70	129	9	No	Yes	Final Approval – In Review	May-2022	Dec-2023
Tukwila Springs	\$19,418,863	\$5,639,209	48	48	0	48	No	Yes	In Construction	Jun-2021	Jun-2022
<b>Total committed or underway</b>		<b>\$48,442,209</b>	<b>461</b>	<b>201</b>	<b>292</b>	<b>117</b>					
<b>LIS commitment</b>		<b>\$116,188,094</b>	<b>812</b>	<b>333</b>	<b>403</b>						
<b>% of commitment complete</b>		<b>41.7 %</b>	<b>57%</b>	<b>60%</b>	<b>73%</b>						
<b>Remaining for LIS</b>		<b>\$67,745,885</b>	<b>351</b>	<b>132</b>	<b>111</b>						

## SECTION 2: 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 brief 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. Funding sources leveraged*
- d. Noteworthy features or highlights (e.g., community space, free wi-fi, accessibility features, childcare, climate resilience and sustainability)*
- e. Anything else worth highlighting*

## FULLER ROAD STATION: 9608 SE FULLER RD, HAPPY VALLEY, OR 97086



Fuller Road Station is 100 units of new affordable housing in unincorporated urban Clackamas County, located directly adjacent to the MAX Green Line. The six-story building with a mix of one-, two- and three-bedroom homes will serve families and individuals with incomes between 30% and 80% area median income (AMI). The units include 17 one-bedroom units, 63 two-bedroom units and 20 three-bedroom units. Energy-efficient heating and cooling will be provided in every unit and any unit in the building can be converted for ADA accessibility. Additionally, the three-bedroom units include in-unit washer/dryers. Future residents will benefit from amenities such as a community room with free wifi, a computer lab with free wifi, an outdoor community plaza, open air nature playgrounds, community gardens, 83 parking spaces, secure bike storage, excellent public transit and space available to local community groups for on-site services.

Fuller Station will serve families and individuals with incomes between 30% and 80% of area median income. Thirty (30) units will be for 30% AMI, seven (7) at 50% AMI, fifty-eight (58) at 60%, and five (5) at 80% AMI. 30 units will be dedicated for families and individuals who are homeless or at risk of homelessness, including foster youth exiting or having exited the system. Project-based vouchers provided by the Housing Authority and services funding from the Metro Supportive Housing Services measure will support these 30 units.

Guardian Real Estate Services, the project's General Partner, will manage the property including the initial lease-up and coordinate the resident services program with non-profit partners, JOIN and DEV NW.

Funding Sources leveraged for this project include: Low Income Housing Tax Credits, OMEP, Metro Affordable Housing Bonds and Transit Oriented Development funds, Clackamas County HOME funds, Project-based vouchers from HACC, Metro Supportive Housing Services funding, and private funding.

**GOOD SHEPHERD VILLAGE: 12596 S.E. 162ND AVENUE, HAPPY VALLEY, OR 97086**



Good Shepherd Village, the first regulated affordable housing development in Happy Valley, will include 143 units ranging in size from studios to three-bedrooms. The project sets aside 35 units of Permanent Supportive Housing (PSH) for those who have experienced houselessness or are at risk of becoming houseless, including 15 units expressly for Veterans. Residents will have convenient access to public transit, grocery stores, schools, a public library, multiple parks and healthcare resources.

The development includes 1 management unit, 13 studios, 50 one-bedrooms, 60 two-bedroom units and 19 three-bedroom units. The three-bedrooms and several of the two-bedroom units will be focused in two buildings each surrounding a small courtyard. A third building will house all of the studios, one-bedrooms, and remaining two-bedrooms, as well as community

rooms and office space for resident and supportive services. In addition to the large, multi-use community room, there is also a separate “quiet room” for resident use. This is one of several trauma-informed design elements in the building, informed through community engagement. Energy-efficient heating and cooling will be provided in every unit. Each building will also provide laundry facilities and secure bike parking for residents. The site will include parking and outdoor gathering and play areas as well as a community garden which was noted as a high priority during engagement activities. Beyond the developed part of the property, the 11-acre site features four acres of protected green space which will remain undeveloped and contribute to the peaceful, natural surroundings. The project uses trauma-informed design, universal design, and sustainable design elements. The project will achieve Earth Advantage Multifamily Gold certification for all three buildings.

Good Shepherd Village will serve families and individuals with incomes up to 60% of area median income. Fifty-eight (58) units will be reserved for households with incomes at or below 30% of AMI and eighty-five (85) units will be reserved for households with incomes up to 60% of AMI. 35 units of Permanent Supportive Housing will be dedicated for families and individuals who have experienced houselessness or are at risk of becoming houseless, including 15 apartments expressly for Veterans. VASH and project-based vouchers provided by the Housing Authority will support these 35 units. Wrap-around services for these 35 units will be supported with Metro Supportive Housing Services funding.

Catholic Charities of Oregon (CCO) is called by a tradition of social justice to the work of equity and inclusion. CCO works to advance equity for immigrants, refugees, and people who are homeless and vulnerable, with a special emphasis on those who are not served by other providers. Good Shepherd Village will serve priority populations with a broad range of needs based on an analysis of people living and/or working in Happy Valley. Services will be provided by Catholic Charities of Oregon in addition to project partners, and the housing arm of CCO, Caritas Housing, will act as the developer.

Funding Sources leveraged for this project include: Low Income Housing Tax Credits, OHCS Permanent Supportive Housing Funds, OHCS Energy Program, Metro Affordable Housing Bond, Project-based vouchers from HACC, Metro Supportive Housing Services funding, private funding, General Partner Equity, Seller Financing, Deferred Developer Fee, and donated land.

## MAPLE APARTMENTS: SOUTH MAPLE LANE COURT, OREGON CITY, OR 97045



Maple Apartments, located minutes from Clackamas Community College in Oregon City, is a multi-building complex set around a gracious central green space. It will include 171 units ranging in size from one-bedroom to four-bedroom units. Designed with immigrant, agricultural worker, and low-income families in mind, 75% of units are two-bedroom and bigger. The project sets aside nine (9) units of Permanent Supportive Housing (PSH) for those who have experienced homelessness or are at risk of becoming homeless.

The development includes 42 one-bedroom units, 54 two-bedroom units, 66 three-bedroom units, and 9 four-bedroom units. Energy-efficient heating and cooling will be provided in every unit. The project also includes an accessible community room with spaces for a movie/game room, book share library, a demonstration kitchen area for events/classes and shared laundry facility. The site design supports a series of amenities within a park-like setting which include community garden space, walking paths, children's play areas and outdoor picnic areas. The project is targeting Earth Advantage Multifamily Gold certification which incorporates a multitude of sustainable design elements.

Maple Apartments will serve families and individuals with incomes between 30% and 60% of area median income. Seventy (70) units will be reserved for households with incomes at or below 30% of AMI and one hundred and one (101) units will be reserved for households with incomes up to 60% of AMI. Forty-three units (43) will reserved for agricultural workers and field laborers and their families. Maple will provide year-round, off-farm, permanent housing with programmatic elements designed with farmworkers in mind. Through a partnership with Northwest Housing Alternatives (NHA), Maple will also set aside 9 PSH units for individuals and families transitioning out of homelessness. These units will include support services

through NHA in addition to services provided by Hacienda’s Youth and Family Services division. Project-based vouchers provided by the Housing Authority will support the seventy units reserved for household with incomes at or below 30% of AMI. Wrap-around services for the 9 PSH units will be supported with Metro Supportive Housing Services funding.

Maple Apartments is a partnership between Community Development Partners (CDP) and Hacienda CDC. CDP and Hacienda are also partnering on Rockwood 10, an affordable workforce housing project located in Gresham. CDP develops affordable housing with a focus on long term community engagement. Hacienda’s expertise is in delivering culturally specific programming for Latino, immigrant, and communities of color. With nearly 2,000 affordable housing units completed between the two organizations, CDP and Hacienda are well-versed in the development of this project type and finance structure and committed to adding diverse and targeted programs unique to Maple Apartments, its residents, and the surrounding community.

CDP’s team will lead the development team comprising of: Hacienda CDC, LMC Construction, Salazar Architect, and Portland State University-Center for Public Interest Design (CPID).

Funding Sources leveraged for this project include: Low Income Housing Tax Credits, Agriculture Workforce Housing Tax Credit, Metro Affordable Housing Bond, Project-based vouchers from HACC, Metro Supportive Housing Services funding, and private funding.

**TUKWILA SPRINGS (FKA WEBSTER ROAD): 18000 WEBSTER ROAD, GLADSTONE, OR 97027**



Located in the City of Gladstone, Tukwila Springs is the rehabilitation of a former congregate care facility into 48 units of Permanent Supportive Housing. Originally constructed in the early 1960s, the building was previously used as a nursing home and most recently as a juvenile rehabilitation center but has been vacant since 2017. HACC acquired the property in 2019 using Metro Affordable Housing Bonds. Tukwila Springs is Clackamas County's Phase 1 Housing Bond Project.

After conferring with the Confederated Tribes of the Grand Ronde and the Mayor of Gladstone, we have selected Tukwila Springs as the project's name. The area the housing development sits on was known for both natural springs and filbert orchards. Tukwila is the Clackamas Tribe word for Filbert.

Tukwila Springs includes 48 units, including 40 studio units & 8 SROs – all units include full bathrooms and, at minimum, a microwave and mini-fridge. Energy-efficient heating and cooling will be provided in every unit. The project includes a robust array of community amenities including a spacious community living room with a fireplace and free wifi, a community kitchen with a spacious dining hall, a large conference room, a wellness room, an exam room with tele-health capabilities, a shared laundry room, and dedicated offices Property Management, Resident Services, and Case Management. The site design will include a landscaped courtyard, accessible resident garden beds, walking paths around the property, and covered outdoor seating areas. The project incorporates trauma-informed design, universal design, and sustainable design elements throughout. The project will achieve at least Earth Advantage Multifamily Gold certification.

All units will serve households with incomes 30% of AMI and below. HACC will provide project-based vouchers (PBVs) for all 48 units. The marketing plan will target near-elderly (50 or older) households who are currently experiencing homelessness or at risk of becoming unhoused and/or disabled. Leasing preferences will be given to applicants with who live or work in Gladstone. All applicants will be referred through the county's Coordinated Housing Access (CHA) wait list. Wrap-around services will be supported by State Permanent Supportive Housing and Metro Supportive Housing Services funding.

The Housing Authority of Clackamas County was the first housing authority in Oregon. It was formed on May 4, 1938. It was formed because county officials saw they had many of the same issues we're facing today – that there was simply not enough safe and affordable housing to meet the needs of low income Oregonians. HACC's mission is to provide and develop affordable housing with supportive services for individuals and families on their path to improved health, wellness, prosperity and inclusion. Tukwila Springs aligns with HACC's mission to provide deeply affordable housing and services for Clackamas County's most vulnerable residents.

HACC's team of development staff will lead the development team comprising of Walsh Construction, Carleton Hart Architects, and Cornerstone Management. Given the organization's extensive experience serving a PSH population, HACC partnered with Home Forward to provide property management, resident services and coordinate wrap around services.

Funding Sources leveraged for this project include: Low Income Housing Tax Credits, Metro Affordable Housing Bond, OHCS Permanent Supportive Housing Funds, Clackamas County HOME funds, Project-based vouchers from HACC, Metro Supportive Housing Services funding, Seller Financing, Deferred Developer Fee, and private funding.

### **SECTION 3: ADVANCING EQUITABLE OPPORTUNITY IN PLANNING AND CONSTRUCTION**

*In keeping with the guiding principle of leading with racial equity, local implementation strategies include commitments to advance racial equity through the planning and construction process, including goals for the amount of contract dollars (hard and soft costs) that will be paid to COBID-certified Minority, Women, and Emerging Small Business (MWESB) firms and strategies for encouraging inclusion of women and people of color in the workforce. Goals and tracking commitments for workforce diversity vary across jurisdictions and projects. Within three months of construction completion, each project will report on contracting outcomes and those tracking workforce diversity will report on workforce outcomes. This data will be included in future annual progress reports.*

***Describe progress toward implementing the equitable contracting and workforce strategies described in your LIS. Be sure to address the following elements:***

- a. Progress toward achieving the equitable contracting goals and strategies in your LIS*
- b. Progress toward advancing the workforce diversity goals and strategies in your LIS*
- c. If applicable, work complete or underway to expand local capacity to monitor and report on contracting and workforce outcomes*

HACC's 2020 NOFA required sponsors to provide a detailed plan to achieve at least 20% COBID certified subcontractor participation and 20% COBID certified professional services participation. The County's first two bond projects, Fuller Road Station and Tukwila Springs, broke ground in the first half of 2021. HACC is tracking labor and wage monitoring closely and both projects appear on track to meet or exceed their contracting goals. Workforce tracking is something that HACC has interest in implementing but additional resources like tracking software and technical assistance are needed to meet this goal. With funding support provided by Metro, HACC recently (Jan 2022) purchased LCP tracking software and is getting trained on the software and process. In addition, HACC has been coordinating with Workforce Clackamas and hopes to require or incentivize projects awarded in the 2022 NOFA round to set workforce goals.

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

Project name	Developer, General contractor	Contracting goals % of total contract amounts paid		Notes and preliminary progress
		Project goal (% hard costs)	Project goal (% soft costs)	
Fuller Road Station	GSA,GRES/R&H	20%	20%	Project is on track to meet or exceed this goal. COBID firms include concrete, waterproofing, insulation, siding, flooring, signage, accessories, window coverings, electrical, low voltage, plumbing, earthwork, and landscaping
Good Shepherd Village	Caritas/Walsh	25%	20%	Not in construction yet. Currently, the project is on track to exceed their original participation goals with approximately 29% participation rate for soft costs and 28% for hard costs. The focus on reaching minority and women-owned sub-contracting firms in particular is reflected by nearly 27% participation from minority- and/or women-owned firms specifically.
Maple Apartments	CDP,Hacienda CDC/LMC	20%	20%	Not in construction yet. COBID contracting goals for hard costs is a minimum of 20%. COBID goals for soft costs is 20%, but the project is currently above 70% for design and consultant services.
Tukwila Springs	HACC/Walsh	20%	20%	Project is on track to exceed this goal. Current estimate is 23%

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	Workforce goals % of total labor hours* worked by			Workforce tracking? Y/N	Prevailing wage BOLI, Davis Bacon, N/A	Notes and preliminary progress
		POC	Women	Apprentices			
Fuller Station	GSA,GRES/R&H				N	Davis Bacon, BOLI	
Good Shepherd Village	Caritas/Walsh				N	Davis Bacon	The project team has connected with local training and education programs and will provide learning opportunities for local CET programs and local community college programs. HACC hopes to work with contractor to gather anecdotal info or voluntary data regarding workforce participation once the project breaks ground.
Maple Apartments	CDP,Hacienda CDC/LMC				N	Davis Bacon	HACC hopes to work with contractor to gather anecdotal info or voluntary data regarding workforce participation once the project breaks ground.
Tukwila Springs	HACC/Walsh				N	Davis Bacon	

For projects that provided a minimum and maximum (or “stretch”) goal, please use the “minimum goal.” Workforce tracking is recommended for contracts above \$250,000.

## SECTION 4: ADVANCING EQUITABLE HOUSING OPPORTUNITY, ACCESS, AND STABILITY

*The guiding principles for the Affordable Housing Bond Program include commitments to lead with racial equity and to create opportunity for those who have been left behind by the region's housing market, especially communities of color, families with children and multiple generations, people living with disabilities, seniors, veterans, households experiencing or at risk of homelessness, and households at risk of displacement. Each local implementation strategy defines commitments and strategies to ensure affirmative marketing, low-barrier lease up practices, and culturally responsive programming—in addition to location priorities that affirmatively further fair housing and support community stability for those who have experienced displacement or risk of displacement. Once projects begin to lease up, data will be collected to report on marketing and lease up metrics and demographics of the initial resident population.*

**Describe progress toward implementing your LIS strategies for supporting fair housing access and community stability through project locations, affirmative marketing strategies, and lease up. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. *How locations of selected projects supported the location strategy described in your LIS, and 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. *Plans and partnerships to align culturally specific/responsive programming and services to meet the needs of tenants.*
- e. *If you have projects that are beginning to lease up, please feel free to share any preliminary data on demographics.*

HACC's 2020 NOFA gave points to priority locations described in the LIS. Location priorities included projects sited in close proximity to public transit, grocery or drug stores, medical services, libraries, or senior centers, public schools, and parks, recreation or community centers. As a result, 100% of HACC's bond projects are located within a quarter mile of bus-service or light rail and within a half mile of a grocery or drug store.

There is strong community support for siting more affordable housing along SE McLoughlin Blvd. McLoughlin Boulevard connects communities in Clackamas and Multnomah counties to jobs, housing, and transit. The McLoughlin Boulevard Transit Corridor connects downtown Milwaukie with downtown Oregon City and Clackamas Community College and the MAX Orange Line goes as far south as Park Avenue connecting Portland City Center to Portland State University (PSU), Southeast Portland, Milwaukie, and Oak Grove. Recently adopted zoning code amendments allow for increased density and provide a significant density bonus for affordable housing. As we draft the 2022 NOFA, HACC is considering prioritizing locations along McLoughlin Boulevard that are within a half mile of the MAX station.

HACC supports low-barrier screening and requires that bond-funded units are made available to households with adverse credit, rental, and legal histories, and very limited income. While none of HACC’s bond projects leased up in 2021, HACC will closely monitor screening criteria and lease-up processes as projects progress.

All Permanent Supportive Housing units receiving project-based rental assistance from HACC will be referred through the county's Coordinated Housing Access (CHA) wait list. HACC is working on services packages that pair rental assistance with wrap around services to encourage sponsors to support additional PSH units in bond-funded projects. In response to the urgent and growing need for supportive housing in the region, the project sponsors developing Fuller Station, Tukwila Springs, and Good Shepherd Village have each committed to providing additional permanent supportive housing units in their developments. While not yet finalized, HACC is hopeful that up to 60 more PSH units will be produced beyond what was originally contemplated.

Aligning culturally specific and responsive programming and services to meet the needs of tenants is something that HACC prioritized in the first NOFA round and plans to incorporate in future solicitations. In coordination with the Metro Supportive Housing Services program, Clackamas County is working to build a consortium of culturally specific community organizations and service providers that can provide culturally responsive services and programming to our residents.

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

<b>Project name</b>	<b>Who the project seeks to serve</b>	<b>Plans/partnerships for affirmative marketing</b>	<b>Plans/partnerships for responsive services</b>
Maple Apartments	Farmworkers and their families	Hacienda CDC, NAYA, El Programa Hispano Católico, NHA, Urban League of Portland, Asian Health & Service Center, IRCO, Impact NW, Clackamas County Social Services & CHA	Hacienda CDC, NHA
Fuller Station	PSH, Foster Youth to Independence (FYI), Asian, Lantinx	Asian Health & Service Center, IRCO, NAYA, Urban League of Portland, El Programa Hispano Católico, Oregon Outreach, Impact NW, Independent Living Resources, Clackamas County Social Services & CHA	JOIN, DevNW, IRCO
Good Shepherd Village	Asian, Lantinx, Veterans, PSH	NARA, Asian Family Center, NAACP, JOIN, NW Pilot Project, Clackamas County Social Services & CHA	Catholic Charities of Oregon, APANO, El Programa Hispano Católico, Familias en Acción, Do Good Multnomah,

## SECTION 5: COMMUNITY ENGAGEMENT TO INFORM PROJECT OUTCOMES

*In keeping with the Affordable Housing Bond Program include commitments to lead with racial equity, each local implementation strategy defines commitments and strategies for ensuring that people of color and members of other historically marginalized communities are engaged in shaping project outcomes. To ensure that we can measure these outcomes, Metro is encouraging and supporting jurisdictional and development partners in collecting and reporting on demographic outcomes for community engagement. While this data is not expected to be complete/thorough for each project, the goal is to expand best practices for tracking and reporting on demographic outcomes.*

**Describe your progress toward implementing your LIS strategies for ongoing community engagement. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to include the following:**

- a. Briefly summarize community engagement activities used (WHAT YOU DID, e.g. “3 listening sessions, 1 survey,” etc.) and partnerships for community engagement—including completing below table.
- b. Summarize who participated in community engagement (WHO PARTICIPATED, e.g. 79 people participated in community engagement activities for Project X, of whom 92% had low incomes and 64% were people of color)—including completing below table.
- c. Summarize major themes of feedback (WHAT YOU HEARD, e.g. “participants want more large units or garden space,” etc.)
- d. Describe themes in how feedback directly informed project implementation and outcomes (WHAT CHANGED, emphasis on feedback from communities of color and other marginalized groups)
- e. Use table to show number of community-engagement partnerships with community-based organizations. Use narrative to briefly describe partnerships, and outreach strategies used to encourage participation and mitigate barriers.

Both the Maple Apartments and Good Shepherd Village projects conducted community engagement activities in 2021. Tukwila Springs and Fuller Station are currently in construction.

### **Maple Apartments:**

The project team engaged with community members in a number of ways including a survey, interviews with community-based organizations, listening sessions with seniors living in affordable housing, a listening session with Oregon City School District migrant families, and a design workshop with Latinx migrant families living in affordable housing.

The survey was distributed in English and in Spanish with 22 multiple choice questions about preferences in apartments, community spaces, and participant demographics. Survey participation included 7 English speaking white participants.

Interviews with community based organizations started with questions to get to know the organization and what they do, then the project team would ask how they would use spaces in a community building and how the design could fit their needs. The

project team would also discuss their interpretation of what their communities needed. The senior listening sessions and in-person tour participants included 7 women. Demographic information like age and race was not collected.

In the listening sessions with seniors, the project team mainly discussed their experiences living in multi-unit affordable housing. This was followed by an in-person tour that the residents provided the project team of their building to show what they loved and what they would change. The Oregon City School Board listening session participants included 5 Latina, Spanish-speaking women.

The design workshop with Latinx migrant families was held over zoom and the project team used the digital white board Miro to facilitate design discussions and programmatic preferences. Participants gave input on the programs for outdoor spaces and shared community spaces. They also designed entryways for the apartments and gave input on parking needs. The Community Design Workshop included 8 Latina women, 1 Latino man, and 1 white woman.

#### Summary of Feedback Received:

Communities and community-based organizations (CBOs) have been overwhelmed since before the pandemic. After a year including many monumental and historic events, CBOs seem to emphasize the importance of resilience by meeting community needs today. Community members expressed needing better access to technology and wifi, better access to transportation, safe and reliable places to keep their car(s), access to childcare especially when accessing services provided by CBOs, reliable maintenance and friendly staff where they live, good relationships with their neighbors, emergency preparedness, apartments built with accessibility in mind beyond ADA requirements, apartments with storage, an easy laundry experience, and access to outdoor spaces.

#### How feedback directly informed project implementation:

Much of the community building program was informed by the engagement sessions. The community building and outdoor shared areas near it will host programs that community organizations and community members need such as access to computers, storage for arts and crafts or cooking classes, quiet areas to study or read, a flex space for child care during appointments or meeting with community orgs, play areas for all ages, exercise equipment, community gardens with raised beds, multiple locations for mural and sculpture art, and programming that supports formal and informal events to create a strong sense of community so residents feel safe and supported. Some items that are still being discussed include designating a space for a backup generator to be built in the future, power back-up for a fridge/freezer to keep medicine cold, and other emergency preparedness measures.

### Engagement Partners:

The project team interviewed or worked directly with the following organizations:

Unite Oregon, Senior Citizens Council of Clackamas County, LoveOne, Do Good Multnomah, Northwest Housing Alternatives, Clackamas Service Center, Clackamas County Youth and Homeless Diversion, The Living Room, DevNW, Oregon City Together, LifeWorks NW, Oregon City Public Library, Homeless Solutions Coalition of Clackamas County, Coalition of Communities of Color, Bridging Cultures, Providence St. Joseph Oregon Regional Behavioral Health - Better Outcomes Through Bridges (BOB) Programs, Latino Network, HINT (Hispanic Interagency Networking Team), OSU Extension Service Family & Community Health, Unite Oregon City, Love in the Name of Christ (Love Inc), Parrot Creek Child & Family Services, OSU Extension Service - Master Gardener, NW Family Service, AntFarm, Here Together, Residents Organizing for Change, Clackamas County Behavioral Health Peer Support Services, Clackamas County Coordinated Housing Access (CHA), Coordinated Housing Access Evolution Group (CHA Evolution), Storyline Community, Clackamas County Public Health, Oregon City School District, Office of Special Programs, Clackamas Workforce Partnership, Hacienda CDC, Center for Public Interest Design

### Outreach strategies and methods:

With the help of the Center for Public Interest Design and Hacienda, the project team was able to reach out to participants by connecting directly with property managers and other community organization leaders to distribute the surveys and encourage participation in the focus groups. The seniors in the listening session all live at Oak Ridge Apartments, an affordable senior living community in Lake Oswego. The families that participated in the design workshop live at Hacienda's Molalla apartments. Participants in the focus groups were compensated with a \$40 gift card to Fred Meyer. The survey participants were encouraged to participate by entering a raffle for \$10 gift cards. The engagement on the surveys was lacking. For future surveys the project team would consider using a shorter survey or distributing and collecting physical surveys.

### Good Shepherd Village:

Caritas Housing hosted a virtual design focus group on Zoom and sent out a survey about interior and exterior color preferences via Google Forms with the hope of getting feedback from groups that represent the communities they aim to house.

In the focus group, the project team shared various unit layouts, interior communal space features, and outdoor communal space features. The larger group split into three breakout rooms where Caritas staff and design team members (MWA Architects and Shapiro Didway landscaping) facilitated open discussions about what participants preferred and why, as well as discussing priorities for potential uses for community spaces. The groups were based on language interpretation needs to allow the most natural dialogue to take place and to minimize the need for multiple language interpreters in one "room" at a time. Participants received a summary of how their input was incorporated into the project and invited further feedback based

on design outcomes. The virtual focus group had 10 participants. Of the attendees, 8 were recruited by APANO (all 8 spoke Chinese as their first language) and 2 were recruited by Do Good Multnomah (both were senior Veterans that had experienced homelessness). There were several recruits from Familias en Acción that did not show up to the virtual meeting. Caritas did not formally collect demographic information from these participants because the engagement took place before Metro distributed the engagement template, thus, demographics noted above are based on input from partner organizations.

Caritas again reached out to these communities through their partners to get feedback on interior and exterior color through a survey. Interior color themes were presented in “mood boards” while exterior colors were presented directly on an elevation of the buildings. Participants were presented with 4 options for interior and exterior colors and asked to rate them on a scale from 1 (do not like) to 5 (like a lot). Similarly, results were shared with participants once they were compiled, and final design decisions based on their input were communicated out. Survey participation included 56 participants including 20 people who identify as Asian/Asian American, 17 people who identify as Hispanic/Latinx/Spanish Origin, 17 people who identify as White and 2 people who preferred not to answer.

#### Summary of Feedback Received:

In the focus group, Caritas received input on unit layout, interior common space uses, and outdoor common space uses. Key takeaways from this meeting were prioritizing covered outdoor space and gardening beds, separating out active and quiet common spaces inside the building, and learning culturally-specific preferences inside units (e.g. strong range hoods, cabinet space instead of a dishwasher).

The color preferences survey was split into interior and exterior spaces. Caritas gathered both quantitative and qualitative responses (rankings and comment responses). Overall, interior responses trended towards more neutral color schemes. Responses varied from appreciation of natural colors like green, light blue, and lighter wood tones, to concerns about keeping these light neutral tones clean over time- especially with children around. Exterior responses were more mixed. Participants seemed to moderately prefer more neutral tones for this color scheme as well. Yellow proved to be a very polarizing color, so yellow was minimized (though not excluded) in the final color decision for the building exterior.

#### How feedback directly informed project implementation:

Because of this engagement process, Caritas is planning on implementing the most popular interior and exterior color scheme selections as voted on by the networks of their culturally-specific community partners. Additionally, as requested by focus group participants, there will be a quiet space set aside from the more active, common space for children to do homework or for relaxing away from group activities, and spaces for quiet reflection are provided throughout the site. The site provides both a formal playground area and nearby, protected paths for bicycle rides, as well as less formally programmed open spaces for

kids to play and for other popular activities to occur (tai chi, yoga, playing ball, etc). The site will also provide gardening beds, an outdoor kitchen/cooking area, and a covered outdoor space for gathering-- outdoor features that were mentioned several times in the focus group. Unit layouts prioritized counter space over pantries, tried to position ranges near operable windows (based on feedback that many traditional dishes utilize high-heat and oils and thus, both a hood vent and a nearby window is strongly preferred to minimize smells and oils infiltrating into other areas of the home), and provided built-in dining space for extra counter space rather than smaller kitchens in exchange for formal dining areas.

#### Engagement Partners:

Caritas partnered with Asian Pacific American Network of Oregon (APANO), El Programa Hispano Católico, Familias en Acción, Do Good Multnomah, and Easterseals. The first three are culturally-specific organizations focused on the Asian and Latinx communities in Portland, respectively. Do Good Multnomah focuses on the Veteran population in the county. Easterseals works with seniors, people living with disabilities, and has culturally-specific services for the Latinx communities within these populations. Caritas had a formal project-specific memorandum of understanding with APANO and El Programa, a general organizational MOU with Easterseals, and will pursue formal partnerships with both Familias and Do Good Multnomah building on our successful partnership for the project's design-focused engagement. The most important take away from this process was learning the lead time necessary to connect with these organizations, translate informational materials about the upcoming engagement, and recruit participants virtually. Caritas' goal is to prioritize the feedback from these populations (to the extent that they can) and cater to the self-identified needs of the historically marginalized communities in Happy Valley. This will hopefully lead to stability and comfort in many future resident's lives—small changes that can make all the difference.

#### Outreach strategies and methods:

Caritas recruited participants through our culturally-specific community partners (detailed below). Their methods included emails, flyer, word-of-mouth at in-person meetings, and WhatsApp texts. The latter method came as a result of APANO realizing the best way to reach out to their network was via WhatsApp, as many of them were not responding to email invitations. Additionally, Caritas compensated all focus group participants with a \$30 Visa gift card and made this known throughout the recruitment process to encourage participation.

Similarly, Caritas shared with potential survey participants that three \$25 Visa gift cards would be raffled off among those who answered the design survey. As noted below, there were Latinx community members that had RSVP'd for the focus group but did not attend. Caritas attempted to follow-up with them via e-mail in order to collect input on the topics described earlier, however, this did not result in any responses. This was potentially related to limited capacity by their partners at Familias in conducting direct follow-up with community members they had recruited to participate. Although Caritas tried to provide

materials and follow-ups in Spanish, responses may have been absent due to lack of consistency in point of contact and/or translation limitations.

## **SECTION 6: CLIMATE RESILIENCE AND SUSTAINABILITY**

*The historic heat wave experienced by the Pacific Northwest in June 2021 made it clear that climate change is not only a challenge for the future; it's here. How are your projects incorporating cooling strategies to keep people safe as temperatures increase and wildfires that impact air quality become more frequent? More broadly, how is your jurisdiction working with affordable housing developers to support climate resilience and climate smart building strategies? What challenges do you face and what opportunities do you see for regional coordination?*

All four Clackamas County Metro bond projects include in-unit, energy efficient heating and cooling. Maple Apartments, Good Shepherd Village, and Tukwila Springs are targeting Earth Advantage Multifamily Gold certification and include a multitude of sustainable design elements. All future bond-funded projects will require air-conditioning in the units. HACC is currently contemplating how best to work with affordable housing developers to build climate resilient projects and strategizing ways to incentivize this work in the 2022 NOFA. HACC anticipates the biggest challenge will be balancing the addition of sustainability measures with community expectations around projects costs. Regional coordination may help normalize thinking around lifecycle costs and weighting the triple bottom line more heavily.

# Housing Bond Progress Report for Washington County | 2021

*The purpose of this report is to summarize local progress toward implementing local implementation strategies for the Affordable Housing Bond program. At the end of each calendar year, participating jurisdictions submit progress reports to Metro. Reports are reviewed by the Affordable Housing Bond Community Oversight Committee, which is charged with monitoring progress toward unit production and policy goals and ensuring alignment with guiding principles. Metro staff produce an annual report summarizing regional progress across all implementing jurisdictions.*

## SECTION 1: UNIT PRODUCTION AND FUNDING

*This section is intended to provide a summary of projects and units in each jurisdiction's Affordable Housing Bond pipeline and Affordable Housing Bond funding commitments. With the passage of the Supportive Housing Services measure in 2020, many jurisdictions are seeking opportunities to expand unit production, deepen affordability, or increase the number of supportive housing units across the portfolio. With this in mind, we are also tracking plans to leverage SHS funding for rental assistance and/or services.*

***Describe progress toward implementing the development plan in your LIS. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following elements:***

- a. Results of competitive selections, including who was involved and how LIS criteria were applied and impacted the outcome.*

Washington County did not have any competitive selections in 2021. Work implementing the Metro Bond in 2021 focused on moving the County's pipeline of ten projects toward construction and completion. The County's pipeline consists of one Phase I project that was selected before the County's LIS was approved, eight projects selected through a competitive solicitation process based on LIS criteria that occurred in 2020, and one acquisition/rehab project selected through the process identified in the County's LIS.

Work in 2021 specifically included:

- Working toward construction completion and equitable lease-up of the County's Phase I Project.
- Working toward closing and construction start for three projects.
- Working on predevelopment for six projects with five of those projects scheduled to close and begin construction in the first half of 2022.

- b. Strategies/outcomes supporting efficient use of Metro bond funds and other sources of public funding in the project; including how projects are responding to increases in LIHTC equity or other additional funding to increase sustainability, durability, and livability for residents, or to reduce the amount of Metro bond subsidy*

Overall, Washington County is positioned to exceed its unit production goal through the efficient use of Metro Bond funds within its implementation area. While the Omnibus resolution passed by US Congress in January 2021 that fixed the rate for Low Income

Housing Tax Credit (LIHTC) equity generally increased that source in each project, those increased sources have help combat extreme cost increases in construction materials and labor. Without this fixed rate it is likely that the County and other implementing partners would have received request for additional funding from project sponsors. Washington County intentionally made funding awards to projects that were less than the per unit subsidy available of \$143,000 per unit, engaging in thoughtful stewardship of the funds by incentivizing larger units and lower income units with additional subsidy. With one project completed, three under construction, one with Final Approval and five others with Concept Endorsement, the County does not plan to reduce the amount of Metro bond subsidy for projects in its pipeline unless there are significant changes to projects at the time of Final Approval that impact a project's contribution to the overall unit production goals.

In 2020, the Washington County Board of Commissioners approved an increase to \$4 million per year for five years to the Housing Production Opportunity fund. \$2.5 million of that annual amount is to support Metro Bond projects within the County if a funding gap emerges as the project near construction closing. These HPOF funds help ensure a timely closing for projects.

- c. *Summary of ongoing funding commitments for project-based rental assistance and ongoing supportive services not included within the project's resident services budget; including how Metro 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.*

Since the passing of the Metro Bond measure in 2018, Washington County has committed 200 Project Based Section 8 Vouchers to the implementing jurisdictions within Washington County – Beaverton, Hillsboro, and Washington County. That commitment remains to achieve the unit production goal for 30% MFI units as well as the PSH goal established in the County's LIS. The Washington County Board of Commissioners leadership direction was to pursue PSH units and work to identify potential funding for supportive services. The passage of the Metro Supportive Housing Services Measure brings that necessary funding for PSH. Staff at the County have been aligning to integrate additional PSH units into Metro Bond projects, and to financially support the ongoing supportive services at projects. The County's Phase I project, Viewfinder, and its first all PSH project, the Aloha Inn are two current examples of this integration.

Viewfinder: This 81-unit project had 8 Project Based Section 8 vouchers and 8 VASH vouchers, as well as a Memorandum of Understanding for resident services with a local homeless services provider prior to the start of the SHS program. As the SHS program has quickly mobilized, SHS and Affordable Housing Bond staff at Washington County discussed with the Viewfinder project sponsor, Community Development Partners, opportunities for additional PSH units at the property. As the property was planning to begin its lease-up process, Community Development Partners agreed to provide 11 additional units for PSH, supported through rental assistance and services funding from the SHS measure.

Aloha Inn: This is a 52-unit motel purchased with Metro Bond funds by the Housing Authority of Washington County in early 2021 with the intent to convert it into 54 units of Permanent Supportive Housing once the SHS funding was available. In addition to working toward renovation of the motel for that permanent use, Washington County was able to use one wing of the motel as an

interim homeless shelter for up to 22 individuals beginning July 1, 2021. A flooding issue decreased the available shelter rooms in late 2021 but 13 rooms continue to be operated as shelter as the other wing of the building is renovated to PSH in late spring 2022.

In addition, County SHS staff together with Affordable Housing Bond staff are discussing with developers on a per project basis opportunities for projects to have additional project-based PSH units. Through the County’s equitable lease-up outreach and process with low-barrier screening criteria, there will be individuals with tenant-based SHS rent assistance that will move into Metro Bond projects as well. This has already occurred at Viewfinder as that project leases up.

- d. *Approach and anticipated timelines for achieving remaining unit production targets, including any priorities for remaining unit production targets. (e.g., location priorities, homeownership, supportive housing etc.)*

The County plans to issue a NOFA in summer of 2022 for Washington County’s remaining allocation of Affordable Housing Bond funds. Geographic dispersal is an important development priority with the County’s implementation area covering such a large area. Based on locations of the County’s approved Metro Bond projects, the County will be eager to fund more projects in southern Washington County, understanding that location is subject to land availability and cost. Additionally, the County intends to continue to align its Affordable Housing Bond work with the Supportive Housing Services program and provide additional PSH units.

The County also has an allocation of Metro’s Regional Acquisition Funds (\$12.9 million) to support additional project(s). County staff are working with Metro staff in early 2022 to pursue potential site acquisitions. With this work, the County will exceed its unit production goals.

**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>				Plans to leverage Supportive Housing Services (SHS) funding <i>(yes/no/TBD)</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	For rental assistance	For wraparound services			
Aloha Housing	\$31,205,650	\$10,230,000	82	33	51	0	No	No	Concept	Mar-2022	Apr-2023
Aloha Inn	\$9,000,000	\$8,465,000	54	54	0	54	Yes	Yes	In Construction	Dec-2021	Aug-2022

Plambeck Gardens	\$54,840,995	\$14,320,000	116	49	62	8	TBD	TBD	Concept	Mar-2023	Jun-2024
Goldcrest	\$33,283,866	\$8,700,000	75	14	46	0	No	No	Final Approval	Feb-2022	Jun-2023
Plaza Los Amigos	\$43,895,104	\$12,830,000	113	26	72	16	TBD	TBD	Concept	May-2022	Aug-2023
Saltzman Road Senior	\$18,339,108	\$5,400,000	54	28	9	24	No	Yes	Concept	May-2022	Jul-2023
Terrace Glen	\$53,579,287	\$17,484,000	144	51	74	3	No	No	In Construction	Nov-2021	May-2023
The Valfre at Avenida 26	\$13,803,343	\$3,792,088	36	8	30	8	No	Yes	In Construction	Jul-2021	Sep-2022
Tigard Senior Housing	\$24,224,047	\$6,270,000	57	23	0	23	No	Yes	Concept	Apr-2022	Jun-2023
Viewfinder	\$32,951,190	\$11,583,000	81	34	56	27	Yes	Yes	Complete	Jun-2020	Dec-2021
<b>Total committed or underway</b>	<b>\$99,074,088</b>	<b>\$116,465,532</b>	<b>812</b>	<b>320</b>	<b>400</b>	<b>163</b>					
<b>LIS commitment</b>	<b>\$116,465,532</b>		<b>814</b>	<b>334</b>	<b>407</b>						
<b>% of commitment complete</b>	<b>85.1%</b>		<b>99.8%</b>	<b>95.8%</b>	<b>98.3%</b>						
<b>Remaining for LIS</b>	<b>\$17,391,444</b>		<b>2</b>	<b>14</b>	<b>7</b>						

## SECTION 2: 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 brief 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. Funding sources leveraged*
- d. Noteworthy features or highlights (e.g., community space, free wi-fi, accessibility features, childcare, climate resilience and sustainability)*
- e. Anything else worth highlighting*

*We do this work on the land of Indigenous people including the Atfalati, the Clatskanie, and the Kalapuya.*

<p><b>Completed</b></p>	<p><b>Viewfinder</b> - Community Development Partners &amp; Housing Authority of Washington County - 81 units - Tigard</p> <p><i>Population to be served:</i> Individuals and Families; 8 units set-aside for Veterans</p> <p><i>Leveraged Funding Sources:</i> 4% LIHTC, SDC Exemption</p> <p><i>Service Partnerships:</i> Good Neighbor Center &amp; Veterans Administration</p> <p><i>Development Team:</i> Bremik Construction &amp; Scott Edwards Architecture</p> <p><i>Project Highlights:</i> 11 units of PSH were added to the project in collaboration with the Supportive Housing Services Program. Community room and outdoor courtyard on second floor; playground onsite. Building features art by three local artists. All units have air conditioning. Building is equipped with solar power.</p>	
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**Under Construction**

**Valfre at Avenida 26** – DCM Communities & Housing Authority of Washington County - 36 units – Forest Grove

*Population to be served:* Individuals and Families; 8 PSH units

*Leveraged Funding Sources:* 4% LIHTC, Washington County Housing Production Opportunity Fund

*Service Partnerships:* Bienestar & Sequoia Mental Health

*Development Team:* LMC Construction & Carleton Hart Architecture

*Project Highlights:* All units have air conditioning. Project built on previous cement mixing plant, providing important infill development. Community space and playground onsite.



**Terrace Glen** – Related NW & Housing Authority of Washington County - 144 units – Tigard

*Population to be served:* Individuals and Families; 3 PSH units

*Leveraged Funding Sources:* 4% LIHTC, Metro Transit Oriented Development, SDC Exemption

*Service Partnerships:* HomePlate Youth Services, EngAge, & IRCO

*Development Team:* Walsh Construction & C2K Architects

*Project Highlights:* All units have air conditioning. Project includes 3 4-bedroom units. Community room and playground onsite. All units have air conditioning.



	<p><b>Aloha Inn</b> – Housing Authority of Washington County - 54 units – unincorporated Washington County</p> <p><i>Population to be served:</i> Individuals – all PSH units</p> <p><i>Leveraged Funding Sources:</i> Housing Production Opportunity Fund (Wa. Co.)</p> <p><i>Service Partnerships:</i> TBD via competitive selection process conducted by Supportive Housing Services Team</p> <p><i>Development Team:</i> GSI Builders, Inc. &amp; Ink Built Architecture</p> <p><i>Project Highlights:</i> Motel conversion project. Washington County’s first all PSH project. All units have air conditioning.</p>	
	<p><b>Goldcrest Apartments</b> – BRIDGE Housing - 75 units – Beaverton</p> <p><i>Population to be served:</i> Individuals and Families</p> <p><i>Leveraged Funding Sources:</i> 4% LIHTC, SDC Exemption, Housing Production Opportunity Fund (Wa. Co.), City of Beaverton</p> <p><i>Service Partnerships:</i> Hacienda CDC</p> <p><i>Development Team:</i> Colas Construction &amp; Salazar Architects</p> <p><i>Project Highlights:</i> Located in high opportunity area (South Cooper Mountain). Community room and playground onsite. All units have air conditioning.</p>	

**Beginning  
Construction  
in 2022**

**Aloha Housing** – BRIDGE Housing - 82 units – unincorporated Washington County

*Population to be served:* Individuals and Families

*Leveraged Funding Sources:* 4% LIHTC, Local Innovation and Fast Track (LIFT) Funding, Metro Transit Oriented Development funds, Washington County Housing Production Opportunity Fund

*Service Partnerships:* Hacienda CDC

*Development Team:* LMC Construction & Scott Edwards Architecture

*Project Highlights:* Units range in size from studio to 3-bedroom. Community room, outdoor play area, BBQs, and raised garden beds onsite. All units have air conditioning.



**Tigard Senior Housing** – Northwest Housing Alternatives - 58 units – Tigard

*Population to be served:* Seniors

*Leveraged Funding Sources:* 4% LIHTC, HOME (Wa. Co.)

*Service Partnerships:* Veterans Administration, SAGE Metro Portland, DAVS Washington County

*Development Team:* Walsh Construction & SERA Architects

*Project Highlights:* Located directly adjacent to the Tigard Senior Center. Provides 23 units of Permanent Supportive Housing for seniors. Located with pedestrian access to Fanno Creek Trail.



**Plaza Los Amigos** - REACH CDC & Bienestar - 113 units – Cornelius

*Population to be served:* Individuals and Families

*Leveraged Funding Sources:* 4% LIHTC, Weatherization funds, Metro Transit Oriented Development Funds, Wa. Co. Housing Production Opportunity Funds, American Rescue Plan Act (ARPA) funds, Energy Trust of Oregon, PGE.

*Service Partnerships:* Sequoia Mental Health Services

*Development Team:* LMC Construction & Ankrom Moisan Architects

*Project Highlights:* 16 Permanent Supportive Housing (PSH) units. Solar power array onsite. Units range in size from 1 to 3-bedrooms. Site features fustal court, community room, community garden and pedestrian connection to local park.



**Saltzman Road Senior** - Home First Development & Christ United Methodist Church - 53 units – unincorporated Washington County

*Population to be served:* Seniors (emphasis on LGBTQIA+ community)

*Leveraged Funding Sources:* 4% LIHTC

*Service Partnerships:* Bienestar, SAGE, Friendly House

*Development Team:* Beaudin Construction & Doug Circosta Architects

*Project Highlights:* 24 Permanent Supportive Housing (PSH) units for seniors.



<p style="text-align: center;"><b>Beginning Construction in 2023</b></p>	<p><b>Plambeck Gardens</b> – Community Partners for Affordable Housing - 116 units – Tualatin</p> <p><i>Population to be served:</i> Individuals and Families</p> <p><i>Leveraged Funding Sources:</i> 4% LIHTC, Washington County Housing Production Opportunity Fund, City of Tualatin, HOME (Wa. Co.)</p> <p><i>Service Partnerships:</i> Centro Cultural, Neighborhood Health Center</p> <p><i>Development Team:</i> LMC Construction &amp; Carleton Hart Architecture</p> <p><i>Project Highlights:</i> Project includes 6 4-bedroom units, as well as 8 Permanent Supportive Housing (PSH) units. Community room onsite. Air conditioning will be provided in units.</p>	
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### SECTION 3: ADVANCING EQUITABLE OPPORTUNITY IN PLANNING AND CONSTRUCTION

*In keeping with the guiding principle of leading with racial equity, local implementation strategies include commitments to advance racial equity through the planning and construction process, including goals for the amount of contract dollars (hard and soft costs) that will be paid to COBID-certified Minority, Women, and Emerging Small Business (MWESB) firms and strategies for encouraging inclusion of women and people of color in the workforce. Goals and tracking commitments for workforce diversity vary across jurisdictions and projects. Within three months of construction completion, each project will report on contracting outcomes and those tracking workforce diversity will report on workforce outcomes. This data will be included in future annual progress reports.*

***Describe progress toward implementing the equitable contracting and workforce strategies described in your LIS. Be sure to address the following elements:***

*a. Progress toward achieving the equitable contracting goals and strategies in your LIS*

Washington County’s LIS identified an aspirational goal of 20% hard and soft costs paid to COBID-certified MWESB firms. The County’s one completed project – Viewfinder, and projects under construction are exceeding this goal.

*b. Progress toward advancing the workforce diversity goals and strategies in your LIS*

Washington County did not set specific goals around workforce diversity in its LIS. Washington County is participating in Metro’s Construction Careers Pathways Project.

c. *If applicable, work complete or underway to expand local capacity to monitor and report on contracting and workforce outcomes*

To monitor and report on contracting goals, Washington County receives information in monthly draw requests, and then receives more detailed quarterly reports that are also reported to Oregon Housing and Community Services (OHCS). Washington County had been tracking workforce outcomes for projects that are subject to prevailing wage requirements through LCP Tracker software. In addition, the County is requesting workforce information periodically from projects during construction that are not subject to prevailing wage.

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

Project name	Developer, General contractor	Contracting goals % of total contract amounts paid to...		Notes and preliminary progress
		Project goal (% hard costs)	Project goal (% soft costs)	
Aloha Housing Development	BRIDGE/ LMC	20%	20%	Has not yet begun construction
Aloha Quality Inn	HAWC/ GSI Builders	20%	20%	Both General Contractor and Architect are MWESB firms
Plambeck Gardens	CPAH/ LMC	20%	20%	Has not yet begun construction
Goldcrest	BRIDGE/ Colas	20%	20%	Both General Contractor and Architect are MWESB firms
Plaza Los Amigos	REACH, Bienestar/ LMC	20%	20%	Has not yet begun construction
Saltzman Road	Home First/ Beaudin	20%	20%	General Contractor is an MWESB firm
Terrace Glen	Related NW/ Walsh	20%	20%	Currently achieving 20.26% in hard and soft costs.
The Valfre at Avenida 26	DCM/ LMC	20%	20%	Currently achieving 30.68% in hard costs.
Tigard Senior Housing	NHA/ Walsh	20%	20%	Has not yet begun construction
Viewfinder	CDP/ Bremik	20%	20%	Achieved 22.39% in hard costs. Achieved 22% in soft costs.

*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	Workforce goals % of total labor hours* worked by...			Workforce tracking?  Y/N	Prevailing wage  BOLI, Davis Bacon, N/A	Notes and preliminary progress
		POC	Women	Apprentices			
Aloha Housing Development	BRIDGE/ LMC	--	--	--	Y	N/A	Has not yet begun construction
Aloha Inn	HAWC/ GSI	--	--	--	Y	BOLI	Began construction in December 2021; data not available at time of report
Plambeck Gardens	CPAH/ LMC	--	--	--	Y	N/A	Has not yet begun construction
Goldcrest	BRIDGE/ Colas	--	--	--	Y	N/A	Has not yet begun construction
Plaza Los Amigos	REACH/ LMC	--	--	--	Y	Davis Bacon	Has not yet begun construction
Saltzman Road	Home First/ Beaudin	--	--	--	Y	N/A	Has not yet begun construction
Terrace Glen	Related NW/ Walsh	--	--	--	Y	N/A	Began construction in late November 2021; data not available at time of report
The Valfre at Avenida 26	DCM/ LMC	--	--	--	Y	N/A	As of 12/31/2021: 62.94% hours worked by POC, 8.3% by women, 8.2% by apprentices.
Tigard Senior Housing	NHA/ Walsh	--	--	--	Y	Davis Bacon	Has not yet begun construction
Viewfinder	CDP/ Bremik	--	--	--	Y	Davis Bacon	As of 12/31/2021: 42.55% hours worked by POC, 2.30% by women, 19.45% by apprentices.

For projects that provided a minimum and maximum (or “stretch”) goal, please use the “minimum goal.” Workforce tracking is recommended for contracts above \$250,000.

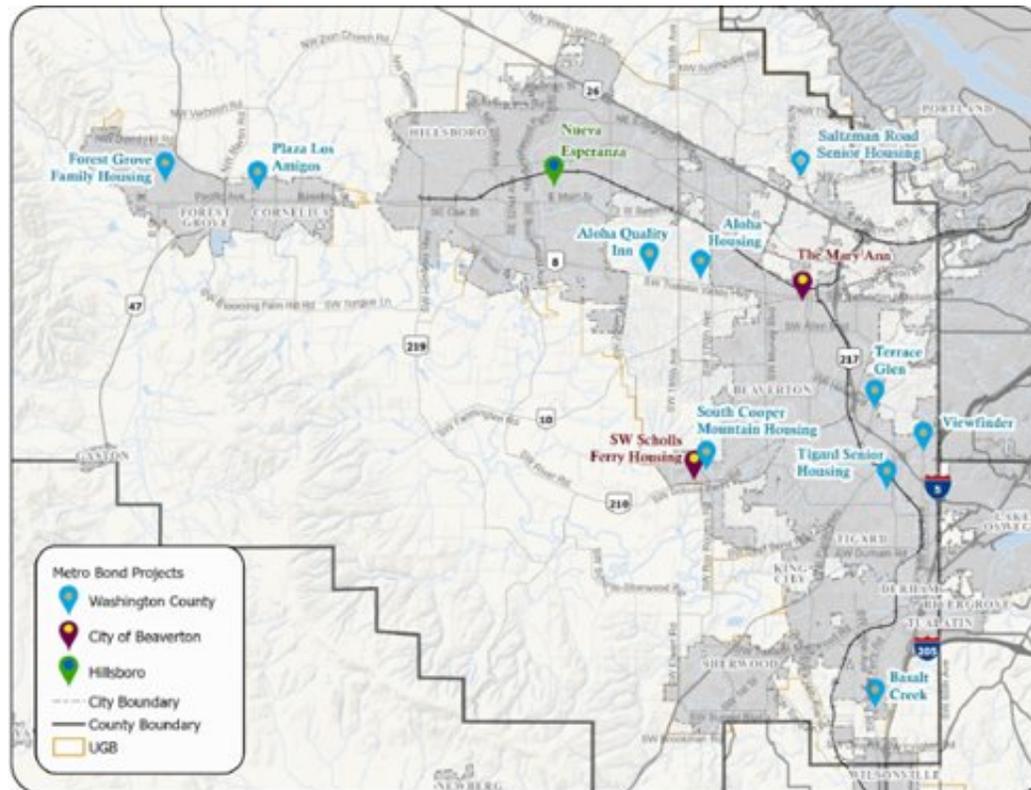
## SECTION 4: ADVANCING EQUITABLE HOUSING OPPORTUNITY, ACCESS, AND STABILITY

*The guiding principles for the Affordable Housing Bond Program include commitments to lead with racial equity and to create opportunity for those who have been left behind by the region’s housing market, especially communities of color, families with children and multiple generations, people living with disabilities, seniors, veterans, households experiencing or at risk of homelessness, and households at risk of displacement. Each local implementation strategy defines commitments and strategies to ensure affirmative marketing, low-barrier lease up practices, and culturally responsive programming—in addition to location priorities that affirmatively further fair housing and support community stability for those who have experienced displacement or risk of displacement. Once projects begin to lease up, data will be collected to report on marketing and lease up metrics and demographics of the initial resident population.*

**Describe progress toward implementing your LIS strategies for supporting fair housing access and community stability through project locations, affirmative marketing strategies, and lease up. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. *How locations of selected projects supported the location strategy described in your LIS, and any location priorities for future solicitations (feel free to include a map if you can)*

Proximity to transit, parks, schools, and basic needs shopping was part of the competitive scoring criteria Washington County utilized in its Notice of Funding Availability (NOFA) evaluation process in 2020. Overall geographic dispersal of projects throughout Washington County’s bond implementation area was also considered broadly throughout the evaluation process. The map below includes projects underway in each of the implementing jurisdictions in the County as a way to show geographic dispersal of Metro Bond funding projects throughout Washington County as a whole.



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

Washington County is using the opportunity of its Phase I project as a pilot project in developing an equitable lease-up strategy. This process has involved multiple steps:

- Meeting with community-based organizations serving communities of color to understand lessons learned from previous lease-up processes.
- Reviewing screening criteria of property management companies for several projects to determine how low-barrier screening is embedded in existing screening criteria.
- Working with the property management company to ensure appropriate translation materials and services are available.
- Developing a property flyer that is accessible to individuals with limited English language skills and can easily be translated.
- Developing a training for community-based organizations to describe the lease-up process in plain language.
- Coordinate with community-based organizations serving communities of color to hold information sessions with individuals interested in housing at the property.
- Follow-up regularly with property management team on timelines and status of project.
- Coordinate with staff working on any project based rental assistance and related programs, including Permanent Supportive Housing.
- Debrief with community-based organizations serving communities of color after the lease-up process to understand what went well and what to improve for the next lease-up process.
- Encourage developers to provide materials and translation services in all of Washington County's identified safe harbor languages.

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

Washington County's Supportive Housing Services team has built upon the existing homeless services infrastructure to restructure the previous coordinated referral system, Community Connect, to connect homeless individuals more efficiently to housing options with a trauma-informed approach. Service providers will be trained to provide a 20-minute Phase 1 assessment that quickly connects people to case workers shelter and care without having to wait for a lengthy phone-based assessment. The phased assessment helps participants building relationships with case workers, who support them through their housing navigation and connection to additional services. The final phase of the assessment, after a housing placement, helps participants consider goals, needs, and resources to support their health and ongoing housing stability.

*d. Plans and partnerships to align culturally specific/responsive programming and services to meet the needs of tenants.*

Nearly all of Washington County's Affordable Housing Bond projects has an existing or proposed partnership with a culturally specific organization to provide services onsite once the projects are constructed.

*e. If you have projects that are beginning to lease up, please feel free to share any preliminary data on demographics.*

The County’s Phase I project, Viewfinder, has begun to lease-up with 22 units currently occupied. Demographic data is being collected and will be available later in the lease-up project. However, from referral information and rental assistance type data is available on the number of homeless households that have moved in at Viewfinder 16 homeless households have moved in since the building opened on December 17, 2021. Two households that participated in the County informational session with the Somali Empowerment Circle have also moved into Viewfinder to-date.

**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 responsive services
Aloha Housing Development	Individuals and Families	Prior to the application period, BRIDGE and Hacienda staff will establish face-to-face relationships with community leaders, culturally specific organizations, service providers, schools, churches, community centers, and others serving communities of color in Aloha and Washington County. Other marketing and leasing channels will include phone calls, in-person visits, and attendance at community groups’ regular meetings and gatherings, and housing or resource fairs. BRIDGE will translate fliers into Spanish and Chinese to reach the target population. A language translation line service will be utilized in the property management office.	Partnership with Hacienda CDC. The resident services programming will include: <ul style="list-style-type: none"> <li>resources to connect residents to behavioral healthcare, physical healthcare, and assistance with food, clothing, and household furnishings.</li> <li>connection to resources to ensure housing stabilization and eviction prevention, such as emergency rental assistance, food pantry, utility assistance, financial fitness class, medical or behavioral healthcare referral.</li> <li>youth and family services, such as afterschool programming and early childhood education.</li> <li>economic opportunity, entrepreneurship, and homeownership services.</li> </ul>
Aloha Inn	Formerly homeless individuals	Referrals for housing will come through the County’s Community Connect system, which is well-connected with diverse service providers throughout Washington County. Admissions into the program will be extremely low-barrier and will ensure that policies that historically have had a disparate impact on communities of color (e.g. criminal background policy and credit screening) are set to the lowest possible levels to eliminate these barriers.	Competitive process to select a PSH operator was completed. A team of Community Partners for Affordable Housing, Sequoia Mental Health and Bienestar will provide case management, behavior health and substance abuse services, and resident services program with a culturally specific lens. Policies and outreach will be tailored to ensure BIPOC communities are aware of the potential services and ensure the project provides

			culturally appropriate services for residents to assist clients from underserved populations.
Plambeck Gardens	Individuals and Families	CPAH is committed to assuring that the Basalt Creek project serves people of color and immigrant populations. CPAH will provide information about how to successfully apply for housing and will work with Unite Oregon to do outreach and a focus groups to provide information about the housing and to ensure we are able to serve diverse populations. CPAH will do an additional outreach in conjunction with the City of Tualatin.	CPAH will be partnering with Centro Cultural to be sure that employment related services are available as well as staying connected to WorkSystems Inc. and the programs that they offer community wide. Centro Cultural proposes to meet with residents on-site in the community center to provide career coaching for adults, along with business development and start up technical assistance. CPAH will partner with the Neighborhood Health Center, which is providing services at Tualatin High School to ensure that health and wellness activities are available onsite. This includes a new partnership with Neighborhood Health Center, which is providing services at Tualatin High School.
Goldcrest	Individuals and Families	Prior to the application period, BRIDGE staff will establish relationships with community leaders, service providers, schools, churches, community centers, and others serving communities of color in Beaverton and Washington County. Hacienda will enhance these efforts and these connections will be an important conduit for publicizing opportunities when leasing information is available. To help prospective residents overcome common barriers to accessing stable housing, BRIDGE has a three-pronged approach to low-barrier screening: starting marketing and outreach early so that prospective residents can mitigate issues that might be a barrier to acceptance, providing alternative methods to meet screening criteria, and adopting an open appeal process.	Partnership with Hacienda CDC. The resident services programming will include: <ul style="list-style-type: none"> <li>• resources to connect residents to behavioral healthcare, physical healthcare, and assistance with food, clothing, and household furnishings.</li> <li>• connection to resources to ensure housing stabilization and eviction prevention, such as emergency rental assistance, food pantry, utility assistance, financial fitness class, medical or behavioral healthcare referral.</li> <li>• youth and family services, such as afterschool programming and early childhood education.</li> <li>• economic opportunity, entrepreneurship, and homeownership services.</li> </ul>

Plaza Los Amigos	Individuals and Families	<p>REACH and Bienestar will work with local community partners to ensure the community is aware of the upcoming housing opportunity and the project budget includes funding for training and paying community partner staff to provide help navigating the application process. Bienestar will work with partners in the Racial Equity Collaborative, the Forest Grove School District, the Immigrant Solidarity Collaborative, Somali Empowerment Circle, and other partnerships to ensure that information is distributed to other communities of color in the area, and will produce, as needed, leasing and other informative materials in languages other than Spanish and English.</p>	<p>Bienestar as co-developer will provide culturally specific services. Sequoia Mental Health is also a service partner. Partnerships with organizations such as Centro Cultural, Sequoia Mental Health, Open Door, and Family Promise will support Bienestar’s outreach to the homeless population and others who may qualify for PSH units.</p> <p>Sequoia staff will work hand in hand with Bienestar’s Promotores to provide outreach and watch for signs that a resident may be experiencing a crisis, and will meet regularly with Bienestar resident services staff and on-site property management staff to coordinate services PSH residents and the property as a whole.</p> <p>Bienestar’s Promotores are resident leaders who connect other residents to needed services, coordinate service provision at properties with Bienestar staff and advocate for their communities’ interests in public forums and processes.</p>
Saltzman Road	Seniors	<p>Home First Development utilizes a Low Barrier model for screening applicants to establish a population composed of individuals demonstrating the highest and most immediate of needs, including but not limited to historically underserved and vulnerable populations such as people of color and/or the LGBTQ community.</p> <p>Low Barrier screening is specifically designed to promote accessibility to households with adverse credit, rental and legal histories, and who subsist on a very limited income. Any applicant who is denied due to an adverse</p>	<p>The service coordinator will empower residents to build a culture of interdependence and mutual support among residents, service providers, and management. SAGE will offer a rich array of educational, social, recreational, fitness, wellness, and community-building opportunities designed to support residents to live with resilience and independence. Bienestar will provide culturally specific services</p> <p>Service coordination will include but is not limited to benefits screenings, resource</p>

		screening outcome will be automatically re-evaluated on a case-by-case basis, taking into account successful completion of treatment or renter success courses, positive references, and any other documents submitted on their behalf.	navigation and referral, coordination of in-home services and supports as needed, options counseling, decision-making support, advocacy and to serve as liaisons between management and residents, with the goal of supporting people to live active and independent lives.
Terrace Glen	Individuals and Families	<p>At the core of all leasing activities at Terrace Glen will be a commitment to affirmatively furthering fair housing. A number of strategies will be employed at the project to provide equitable access, including:</p> <ul style="list-style-type: none"> <li>• Low barrier to entry screening that includes a consistently applied override policy for reviewing prospective tenant’s credit, rental, and criminal histories.</li> <li>• Linguistically appropriate materials that reflect community demographics to provide access to priority communities and help ensure equitable access to communities of color.</li> <li>• On-site management and staff will receive diversity, equity and inclusion training and will be educated to understand the specific target population goals of the project. Importantly, management will endeavor to hire staff and vendors representative of the community.</li> </ul>	<p>EngAGE, Immigrant &amp; Refugee Community Organization (IRCO), and HomePlate Youth Service are all service partners. HomePlate will provide culturally responsive youth programming to youth aged 18-24.</p> <p>An enriched arts program will enhance the vibrancy of the community to the residents. The proposed program will provide an intergenerational arts program to residents with EngAGE operating the program.</p> <p>In addition, resident services staff will develop a services program customized to the resident population. The resident services program will provide programming to facilitate economic stability, strategies for increased educational success, promote healthy lifestyles, and build strong communities.</p>
The Valfre at Avenida 26	Individuals and Families	An initial lease-up kick-off meeting was held in December 2021. Service providers will collaborate with property manager on an equitable lease-up process. Latinxs represent over 30% of the Forest Grove/Cornelius population, which makes this group the area’s largest community of color. At the same time, gentrification and displacement pressures on the Latinx community and other communities of color are intensifying as the cost of living in Forest Grove/Cornelius has consistently increased year over year.	Partnership with Bienestar and Sequoia Mental Health. Services will be provided in partnership with Bienestar to ensure that culturally specific, bilingual care is provided to the residents. Special emphasis will be placed on developing relationships with culturally specific service providers that already maintain a working relationship with Bienestar, such Adelante Mujeres and Centro Cultural and Virginia Garcia Memorial Health Center, to ensure that a diverse resident population will have their

		<p>Bienestar’s historical model consists of marketing availability of units through the following in-person strategies: in-person visits to major employment centers, communication at places of worship, libraries, and stores owned by Latinx entrepreneurs or frequented by Latinx target populations. Additionally, Bienestar will rely on word of mouth via its Promotores as part of their normal volunteer activities and in their respective places of work and direct referrals from our 2,000 tenants from among their social and professional networks.</p>	<p>needs met. Sequoia staff and Bienestar resident service staff will consult routinely to share information, problem solve issues and avoid or mitigate crisis situations. Sequoia staff will work hand in hand with Bienestar’s Promotores to provide outreach and watch for signs that a resident may be experiencing a crisis and will meet regularly with Bienestar resident services staff and on-site property management staff to coordinate services PSH residents and the property as a whole.</p> <p>Bienestar’s Promotores are resident leaders who connect other residents to needed services, coordinate service provision at properties with Bienestar staff and advocate for their communities’ interests in public forums and processes.</p>
Tigard Senior Housing	Seniors	<p>Using an analysis of both existing resident demographics and census data, NHA will identify and market to those groups and communities that are underrepresented and least likely to apply. This includes a low-barrier screening criteria, individualized review process for appeals of denied applications, and clear communication protocols for all.</p> <p>Additionally, with the help of the constituencies of the Coalition of Communities of Color, NHA will provide outreach services to underserved communities in Washington County and partner with culturally specific organizations to make sure that those least likely to apply will apply for tenancy.</p>	<p>Tigard Senior Center / Meals on Wheels, SAGE Metro Portland, Pathways and Disability, Aging, and Veteran Services of Washington County are service partners for the project. The primary goal of Resident Services at Tigard Senior Housing will be housing stability and eviction prevention. Resident Services will be available on site 6-8 hours per week and NHA will meet with residents and property management, collaborate with community providers, and organize events that will be held at Tigard Senior Housing. These events, which are available to all residents, include preventive health checks, information sessions, and recreation/socialization opportunities. Every resident at Tigard Senior Housing, including those residents in HUD-VASH units, will have access to the Resident Services Coordinator for the property. The coordinator will both</p>

			respond to individual needs and organize events and activities for the overall property.
Viewfinder	Individuals and Families	Lease-up process is underway. The equitable lease-up process approach outlined in Section 4b above was the process used.	Partnership with Good Neighbor Center and the Veterans Administration. Good Neighbor Center has full-time staff onsite to provide case management to PSH households as well as resident services available to the full community. The Veterans Administration staff provides case management to households with VASH vouchers at the property.

## SECTION 5: COMMUNITY ENGAGEMENT TO INFORM PROJECT OUTCOMES

*In keeping with the Affordable Housing Bond Program include commitments to lead with racial equity, each local implementation strategy defines commitments and strategies for ensuring that people of color and members of other historically marginalized communities are engaged in shaping project outcomes. To ensure that we can measure these outcomes, Metro is encouraging and supporting jurisdictional and development partners in collecting and reporting on demographic outcomes for community engagement. While this data is not expected to be complete/thorough for each project, the goal is to expand best practices for tracking and reporting on demographic outcomes.*

**Describe your progress toward implementing your LIS strategies for ongoing community engagement. . Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to include the following:**

- a. Briefly summarize community engagement activities used (WHAT YOU DID, e.g. “3 listening sessions, 1 survey,” etc.) and partnerships for community engagement—including completing below table.
  - **3 listening sessions:** 1 multifamily housing listening session (partnered with Bienestar) and 2 senior housing/senior friendly housing listening sessions (partnered with Bienestar and APANO)
  - **2 surveys:** 1 multifamily housing survey and 1 senior housing survey
  - **1 informational session:** lease-up informational session about the Viewfinder (partnered with Somali Empowerment Circle)
- b. Summarize who participated in community engagement (WHO PARTICIPATED, e.g. 79 people participated in community engagement activities for Project X, of whom 92% had low incomes and 64% were people of color)—including completing below table.
  - **28 listening session participants:** 100% identify as BIPOC community members, cannot provide low-income percentage of only these 28 participants because only have aggregate low-income breakdown of participants who filled out demographic collection form (which was 36 out of 75 total participants of listening sessions). Five additional listening sessions occurred in fall of 2020.

- **126 multifamily housing survey respondents:** vast majority identify as BIPOC community members, estimated at least 75% (can't provide exact percentage because respondents could choose more than one option for racial/ethnic identification), 67% of respondents qualify as either very low-income or extremely low-income (below 80% AMI).
  - **29 senior housing survey respondents:** vast majority identify as BIPOC community members, estimated at least 86.4% (can't provide percentage because respondents could choose more than one option for racial/ethnic identification), 67% of respondents qualify as either very low-income or extremely low-income (below 80% AMI)
  - **18 informational session participants:** 100% identify as BIPOC community members, 9 out of 18 participants answered income breakdown question: 89% of respondents identify as either very low-income or extremely low-income (below 80% AMI)
- c. *Summarize major themes of feedback (WHAT YOU HEARD, e.g. "participants want more large units or garden space," etc.)*

**Listening sessions major feedback themes:**

- Community rooms need to be larger, especially the meeting area space.
- Green spaces, community rooms, and outdoor picnic areas serving as community building tools.
- Creating a living environment focused on ensuring residents live comfortably, safely, and have a community should be a top priority at affordable housing complexes.

**Surveys major feedback themes:**

- Providing a wide range of on-site support services to help residents access resources needed to thrive.
- Creating indoor and outdoor spaces that foster a sense of community among residents and allow residents to comfortably and safely live regardless of age, size, ability, or disability.
- More specifically, respondents of both surveys identified outdoor lighting, social services, and activity and library space as integral elements to offer at affordable housing complexes.

**Informational session themes:**

- Participant feedback wasn't provided during this session; session was intended to help familiarize participants with the Viewfinder lease-up process

- d. *Describe themes in how feedback directly informed project implementation and outcomes (WHAT CHANGED, emphasis on feedback from communities of color and other marginalized groups)*

BRIDGE and Related NW used feedback from the Washington County-led community engagement work to inform project design for their projects - Goldcrest and Terrace Glen. Based on the major feedback theme of outdoor spaces serving as community-building tools, BRIDGE added two grills and pedestrian walkways to the design plans, and community gardens were already included in original design plans. Related NW addressed this feedback theme by adding a second grill to the design plans. Based on the major feedback theme of design layout promoting safety, BRIDGE's original design includes a fenced perimeter built around playground and the playground being in a central location with quality lighting for high visibility. Additionally, BRIDGE's original design plans include ground floor, one level units for residents with mobility limitations. Related NW addressed this feedback theme by relocating

outdoor benches to allow better visibility of children in the play area and changing the first-floor laundry room entrance to allow better access and visibility to the outdoor courtyard area and playground. Based on the major feedback theme of indoor spaces serving as community-building tools, BRIDGE’s original design plans for the community room include a communal kitchen. Related NW addressed this feedback theme by adding a staging area for cooking classes and food-oriented gatherings as well as a second range to the communal kitchen in the community room. Related NW addressed the major feedback theme of larger community rooms by adding to the design plans a moveable partition between the community and art rooms to accommodate larger groups.

- e. Use table to show number of community-engagement partnerships with community-based organizations. Use narrative to briefly describe partnerships, and outreach strategies used to encourage participation and mitigate barriers.

**Summary of community engagement partnerships**

	Total community-based organizations	Culturally specific organizations	Faith-based organizations	Other community-based organizations <i>(not culturally specific or faith based)</i>
Number of partnerships	4	4	0	0
List of organizational partners	APANO, Bienestar, Somali Empowerment Circle, Adelante Mujeres	APANO, Bienestar, Somali Empowerment Circle, Adelante Mujeres	N/A	N/A

**Summary of community engagement outcomes**

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 experienced homelessness
Online Survey – Multi-family housing	126	Y	125	75%	67%	No data	No data	57%	20.16% in affordable housing	No data
Online Survey – Senior housing	29	Y	28	84.6%	67%	No data	No data	51.85%	14.29% in affordable housing	No data
Lease-up Information Session	18	Y	9	100%	89%	No data	No data	89%	No data	No data

## SECTION 6: CLIMATE RESILIENCE AND SUSTAINABILITY

*The historic heat wave experienced by the Pacific Northwest in June 2021 made it clear that climate change is not only a challenge for the future; it's here. How are your projects incorporating cooling strategies to keep people safe as temperatures increase and wildfires that impact air quality become more frequent? More broadly, how is your jurisdiction working with affordable housing developers to support climate resilience and climate smart building strategies? What challenges do you face and what opportunities do you see for regional coordination?*

Developers have considered cooling strategies coupled with sustainability features in their project designs. This is informed also by State requirements for Low Income Housing Tax Credit projects. Specifically, each project completes a sustainability program that is evaluated by Oregon Housing and Community Services (OHCS). Additionally, projects are required to be solar ready as part of the State's requirements. In addition, projects that have leveraged Affordable Housing Bond funds with federal funds are required to complete an Environmental Review process that often results in improvements to stormwater management, as well as additional sustainability and efficiency measures.

Washington County works collaboratively with developers to incorporate cooling strategies specific to the building type, building location and target population. All ten projects in Washington County's pipeline have air conditioning available at the property – eight projects will be providing air conditioning in each unit; two will provide external ports for residents to connect their own portable air conditioning units, and all projects will provide air conditioning in indoor community spaces. County staff have engaged affordable housing developers in conversations regarding climate resilience. Many developers are focusing on improved building systems, wall assemblies, insulation, ventilation, and roofing that help buildings maintain a constant safe temperature in periods of extreme weather. As building systems innovations continue, Washington County will work with developers to identify climate resilience features in future buildings while also balancing other goals. Balancing often competing project goals – cost-efficiency, durable finishes, sustainable features, climate resiliency components, community-informed project design – is the primary challenge of this work.

# Housing Bond Progress Report for Beaverton | 2021

*The purpose of this report is to summarize local progress toward implementing local implementation strategies for the Affordable Housing Bond program. At the end of each calendar year, participating jurisdictions submit progress reports to Metro. Reports are reviewed by the Affordable Housing Bond Community Oversight Committee, which is charged with monitoring progress toward unit production and policy goals and ensuring alignment with guiding principles. Metro staff produce an annual report summarizing regional progress across all implementing jurisdictions.*

## SECTION 1: UNIT PRODUCTION AND FUNDING

*This section is intended to provide a summary of projects and units in each jurisdiction's Affordable Housing Bond pipeline and Affordable Housing Bond funding commitments. With the passage of the Supportive Housing Services measure in 2020, many jurisdictions are seeking opportunities to expand unit production, deepen affordability, or increase the number of supportive housing units across the portfolio. With this in mind, we are also tracking plans to leverage SHS funding for rental assistance and/or services.*

***Describe progress toward implementing the development plan in your LIS. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following elements:***

- a. Results of competitive selections, including who was involved and how LIS criteria were applied and impacted the outcome.*
- b. Strategies/outcomes supporting efficient use of Metro bond funds and other sources of public funding in the project; including how projects are responding to increases in LIHTC equity or other additional funding to increase sustainability, durability, and livability for residents, or to reduce the amount of Metro bond subsidy*
- c. Summary of ongoing funding commitments for project-based rental assistance and ongoing supportive services not included within the project's resident services budget; including how Metro 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.*
- d. Approach and anticipated timelines for achieving remaining unit production targets, including any priorities for remaining unit production targets. (e.g., location priorities, homeownership, supportive housing etc.)*

The city of Beaverton elected to use a portfolio approach to achieve established production goals. In addition, priority was placed on leveraging publicly owned properties. The tables below represent the original portfolio model and the current estimates based on updated project expectations.

### BEAVERTON PORTFOLIO MODEL

Project	2+ Bd	30% AMI	PBV	Total Units
The Mary Ann	29	11	8	54
Elmonica	37	28	9	79
Project C	42	38	16	66
Project D	6	12	2	51
<b>Total</b>	<b>114</b>	<b>89</b>	<b>35</b>	<b>250</b>
<b>Metro Target</b>	<b>109</b>	<b>89</b>	<b>n/a</b>	<b>218</b>

### BEAVERTON PORTFOLIO ACTUAL (1-27-22)

Project	2+ Bd	30% AMI	PBV	Total Units
The Mary Ann	29	11	8	54
Elmonica	33	33	8	80
Senior Housing on 5th	0	38	19	66
Scholls Ferry Rd	160	31	0	216
<b>Total</b>	<b>222</b>	<b>113</b>	<b>35</b>	<b>416</b>
<b>Metro Target</b>	<b>109</b>	<b>89</b>	<b>n/a</b>	<b>218</b>

#### Project summaries

**The Mary Ann:** This First Phase project by REACH CDC broke ground in June 2020 and began leasing units in September. The project exceeded 20% COBID-certified subcontractor and professional services participation. As of January 20, 2022, 45 of the 54 unit have been leased, with a long waiting list to process.

**Scholls Ferry Rd:** The Scholls Ferry Rd project was originally proposed as a 182-unit, two stand-alone building projects. One of the buildings was set aside for senior housing (80 units). The project has expanded since then, as the developer was able to secure the adjacent property. The project now consists of four stand-alone buildings containing 309 units, 216 of which will be restricted at 60% AMI or below. The remaining 93 units will be restricted at 70% AMI or below. The project is currently in the predevelopment process with an estimated April 2022 closing and

construction start. Since the last update, Wishcamper Development partners have selected COLAS Construction as their general contractor. Together, their goal is to exceed the 20% COBID-certified subcontractor participation.

**Elmonica:** On June 1, 2021, Beaverton City Council selected REACH Community Development Corporation (REACH) as the affordable housing developer for the Metro-owned site located at 17030 SW Baseline Road on the southwest corner of W Baseline Road and SW 170th Avenue. On the same day, Beaverton City Council also recommended Metro provide concept approval of the Elmonica Project as submitted by REACH, and reserve \$11.9 million of Metro Affordable Housing Bond funds for construction of the project. On December 16, 2021, Metro provided concept approval for the project. The project is currently going through the predevelopment process with a targeted closing in fourth quarter 2022.

**Senior Housing on 5<sup>th</sup>:** Previously known as Project C, the final project in the city’s plan will be a senior housing project. Senior housing is listed as a housing priority in the city’s Local Implementation Strategy. The city intends to issue a developer solicitation this year, which will in turn inform the potential project timeline.

**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>				Plans to leverage Supportive Housing Services (SHS) funding <i>(yes/no/TBD)</i>		Status	Construction start <i>(anticipated or actual)</i>	Completion
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units	For rental assistance	For wraparound services			
Mary Ann	\$22,167,324	\$3,000,000	54	11	29				Complete	Jun-2020	Sep-2021
Scholls Ferry Road	\$114,654,488	\$9,000,000	216	31	160				Concept	April 2022	Dec 2023
Elmonica	\$34,078,352	\$11,900,000*	80	33	33				Concept	Summer/fall 2022	Winter 2023/24
<b>Total committed or underway</b>		<b>\$23,900,000</b>	<b>350</b>	<b>75</b>	<b>222</b>						
<b>LIS commitment</b>		<b>\$31,140,595</b>	<b>218</b>	<b>89</b>	<b>109</b>						
<b>% of commitment complete</b>		<b>76.7%</b>	<b>161%</b>	<b>84%</b>	<b>203%</b>						
<b>Remaining for LIS</b>		<b>\$7,240,595</b>	<b>Exceeds Goal</b>	<b>14</b>	<b>Exceeds Goal</b>						

\*TOTAL METRO FUNDS INCLUDES \$8,500,000 FROM BEAVERTON’S SHARE AND \$3,400,000 FROM METRO’S LAND ACQUISITION FUND

## SECTION 2: 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 brief 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. Funding sources leveraged*
- d. Noteworthy features or highlights (e.g., community space, free wi-fi, accessibility features, childcare, climate resilience and sustainability)*
- e. Anything else worth highlighting*

**Mary Ann:** The Mary Ann intends to serve very low-income families with children with incomes at or below 60% of the Area Median Income (AMI), with 20% of the homes set aside for households at or below 30% AMI. Onsite programs and services to residents will be provided through a partnership with Bienestar. As part of their work, Bienestar provides culturally specific, bilingual services to the Latinx and low-income community of Washington County. The building is owned and managed by REACH. The Mary Ann is designed by Scott Edwards Architecture with construction by Walsh Construction, and construction management by The Klash Group. This \$22.6 million project is financed with funding from the City of Beaverton’s allocation of the Metro affordable housing bond, Oregon Housing and Community Services, Business Oregon, Washington County, City of Beaverton grant funds, the Beaverton Urban Redevelopment Agency, and Energy Trust of Oregon. Permanent financing will be provided by the Network for Oregon Affordable Housing (NOAH). Wells Fargo Bank made a nearly \$12M Low Income Housing Tax Credit equity investment in the project and is also the construction lender. The Community Housing Fund provided acquisition financing. In addition to the new homes, The Mary Ann features 39 parking spaces, bike racks in the garage and wall hung bike racks in the apartments, laundry facilities, and a community room that opens to a large courtyard. Residents will also benefit from proximity to transit options like the MAX light rail and WES community rail, multiple shopping opportunities, grocery stores, Beaverton City Library, post office, restaurants, services, parks, and across the street from Beaverton High School.



***Scholls Ferry Rd:*** The project proposes to include **309-units, 31 of which will be restricted at 30% AMI, 185 will be restricted at 60% AMI, and the remaining 93 units restricted at 70% AMI.** The project includes 30,000 square feet of commercial space, 13-acres of public open-space and trails, and three public parks. The affordable housing component will provide much-needed housing options for families and individuals within the Beaverton community, including 80-units of senior housing. Colas Construction is the general contractor, P3 Consulting and IZO Public Relations as the Community Relations assistance, Unite Oregon as the Outreach Consultant, Guardian Real Estate as Property Management. Community partnerships are still being vetted and they include, Community Partners of Affordable Housing (CPAH), Virginia Garcia as potential Healthcare service provider, Centro Cultural and others



**Elmonica:** On June 1, 2021, City of Beaverton Council approved the selection of REACH CDC as the developer for the Elmonica project and requested Metro provide concept approval of the project. Metro provided such approval on December 16, 2022. The selected proposal is an 81-unit mix of studio, one-bedroom, two-bedroom, and three-bedroom units. The design is done in a way to promote multi-generational living with the studio units next to the three-bedroom units. The table below represents the proposed unit mix for the project.

Nearby amenities:

- Public schools serving the site include Beaver Acres Elementary School, 5 Oaks Middle School, and Aloha High School.
  - Parks within the immediate vicinity include: the Waterhouse Powerline Park, Parr Park, Tualatin Hills Park, Vendla Park, and Tualatin Hills Nature Park.
  - The site is centrally located with multiple and diverse grocery stores within less than 2 miles.
  - Major employers in the general surrounding area include Nike, Intel, Tektronix, Cascade Microtech, Columbia Sportswear, Providence St. Vincent Hospital, in addition to many high-tech companies.
- The site is located less than 1,000 from the Elmonica light rail station. Nearby bus routes include the #67 on 158<sup>th</sup>, #59 on Walker, and #52 on 185<sup>th</sup>

## UNIT MIX

UNIT TYPE	AVERAGE SIZE (SQFT)	NUMBER OF UNITS	% OF UNITS
Studio	420	24	30%
One Bedroom	644	24	30%
Two Bedroom	868	18	22%
Three Bedroom	1,064	15	19%
<b>TOTAL/AVERAGE</b>	<b>705</b>	<b>81</b>	<b>100%</b>

Colas Construction (COLAS), the largest Black-owned construction firm in the Northwest, is the general contractor selected for this project. COLAS is an industry leader in affordable housing, M/WBE percentages and consistently delivers on-time and on-budget for large-scale projects. COLAS and REACH have also partnered with LatinoBuilt, National Association of Minority Contractors, Oregon Association of Minority Entrepreneurs, Oregon Tradeswomen, Portland Opportunities Industrialization Center (POIC), and many others to achieve tangible minority/women-owned contractor results.

Bienestar will support outreach, marketing, lease-up, and deliver programing to the project. The building will utilize trauma-informed and universal design standards including accessible Type A units, hearing impaired units, multi-lingual signage, and maximize natural light in common spaces.

### SECTION 3: ADVANCING EQUITABLE OPPORTUNITY IN PLANNING AND CONSTRUCTION

*In keeping with the guiding principle of leading with racial equity, local implementation strategies include commitments to advance racial equity through the planning and construction process, including goals for the amount of contract dollars (hard and soft costs) that will be paid to COBID-certified Minority, Women, and Emerging Small Business (MWESB) firms and strategies for encouraging inclusion of women and people of color in the workforce. Goals and tracking commitments for workforce diversity vary across jurisdictions and projects. Within three months of construction completion, each project will report on contracting outcomes and those tracking workforce diversity will report on workforce outcomes. This data will be included in future annual progress reports.*

***Describe progress toward implementing the equitable contracting and workforce strategies described in your LIS. Be sure to address the following elements:***

- a. Progress toward achieving the equitable contracting goals and strategies in your LIS*
- b. Progress toward advancing the workforce diversity goals and strategies in your LIS*
- c. If applicable, work complete or underway to expand local capacity to monitor and report on contracting and workforce outcomes*

The city strives to have a workforce which represents the racial and ethnic makeup of the community it serves and as stewards of the Metro Affordable Housing Bond, we continue to further this work through continued strategizing and outreach efforts with community partners and the MWESBDV/COBID community.

The city has established partnership with LatinoBuilt, Professional Development Business Group (PDBG), OAME, and similar trade associations. These partnerships provide a conduit to selected developers and subs for contracting opportunities.

To follow up on some of the identified challenges, such as outreach fatigue/trust issues with government entities, casual meet and greets that don't result in meaningful connections, and lack of knowledge about the City of Beaverton and its commitment to MWESB hiring and the COBID certification process, the city has taken several steps. After each project award, the successful developer is asked to attend a trade association event with their general contractor to discuss and project schedule with prospective subcontractors. Staff regularly attend trade association meetings and continue to develop relationships within these communities.

While the city did not commit to a specific workforce or apprentice performance, we do want to track this data as it will inform capacity and areas of employment/contracting opportunities. To that end, the city tracks the demographics and hours worked by each apprentice and combines that with labor hours to express the percentage of apprenticeship hours on each project. Reports produced from the Mary Ann show that 11.52% of hours spent on the project were apprentice hours. It is our intent to track this information for all housing projects.

Also, the City of Beaverton funded LatinoBuilt Foundation through our Community Development Block Grant (CDBG) to expand a project called the "LatinoBuilt Microenterprise Support Program," which offers holistic professional services to small Latinx-owned construction businesses in Beaverton who have suffered due to the COVID-19 pandemic. Their goal for this year is to onboard and facilitate this programming for twenty (20) Latinx-owned microenterprise construction businesses in Beaverton.

The City of Beaverton Internet Development Staff developed and implemented a web-based software COBID tracking system. This MWESB database stores progress at all phases of construction to facilitate ongoing communication between the City of Beaverton and the Developer. The information captured on each project includes the estimate and actual costs of professional services, suppliers, and subcontractors, in addition to labor and apprenticeship hours spent on each site. The labor and apprenticeship hours include race and ethnicity, gender, and the specific trade of each employee. These reports provide insight into where the project stands in real time with MWESB percentages and promotes our ability to successfully implement equitable contracting goals and strategies in listed in our LIS.

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

Project name	Developer, General contractor	Contracting goals % of total contract amounts paid to...		Notes and preliminary progress
		Project goal (% hard costs)	Project goal (% soft costs)	
Mary Ann	REACH/Walsh	20%	20%	
Scholls Ferry	Wishcamper/COLAS	20%	20%	
Elmonica	REACH CDC/COLAS	25%	25%	

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	Workforce goals % of total labor hours* worked by...			Workforce tracking? Y/N	Prevailing wage BOLI, Davis Bacon, N/A	Notes and preliminary progress
		POC	Women	Apprentices			
Mary Ann	REACH/ Walsh	40.33%	3.22%	11.52%	Y	N/A	1.42% (Women) + 1.80 (apprentice Women)
Scholls Ferry	Wishcamper/COLAS	N/A	N/A	N/A	Y		
Elmonica	REACH CDC/COLAS	N/A	N/A	N/A	Y		

For projects that provided a minimum and maximum (or “stretch”) goal, please use the “minimum goal.” Workforce tracking is recommended for contracts above \$250,000.

## SECTION 4: ADVANCING EQUITABLE HOUSING OPPORTUNITY, ACCESS, AND STABILITY

The guiding principles for the Affordable Housing Bond Program include commitments to lead with racial equity and to create opportunity for those who have been left behind by the region’s housing market, especially communities of color, families with children and multiple generations, people living with disabilities, seniors, veterans, households experiencing or at risk of homelessness, and households at risk of displacement. Each local implementation strategy defines commitments and strategies to ensure affirmative marketing, low-barrier lease up practices, and culturally responsive programming—in addition to location priorities that affirmatively further fair housing and support community stability for those who have experienced displacement or risk of displacement. Once projects begin to lease up, data will be collected to report on marketing and lease up metrics and demographics of the initial resident population.

**Describe progress toward implementing your LIS strategies for supporting fair housing access and community stability through project locations, affirmative marketing strategies, and lease up. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. How locations of selected projects supported the location strategy described in your LIS, and 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. Plans and partnerships to align culturally specific/responsive programming and services to meet the needs of tenants.
- e. If you have projects that are beginning to lease up, please feel free to share any preliminary data on demographics.

### **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 responsive services
Mary Ann	Families	Bienestar	Bienestar
Scholls Ferry	Seniors/Families	TBD	TBD
Elmonica	Seniors/Families	Bienestar	Bienestar

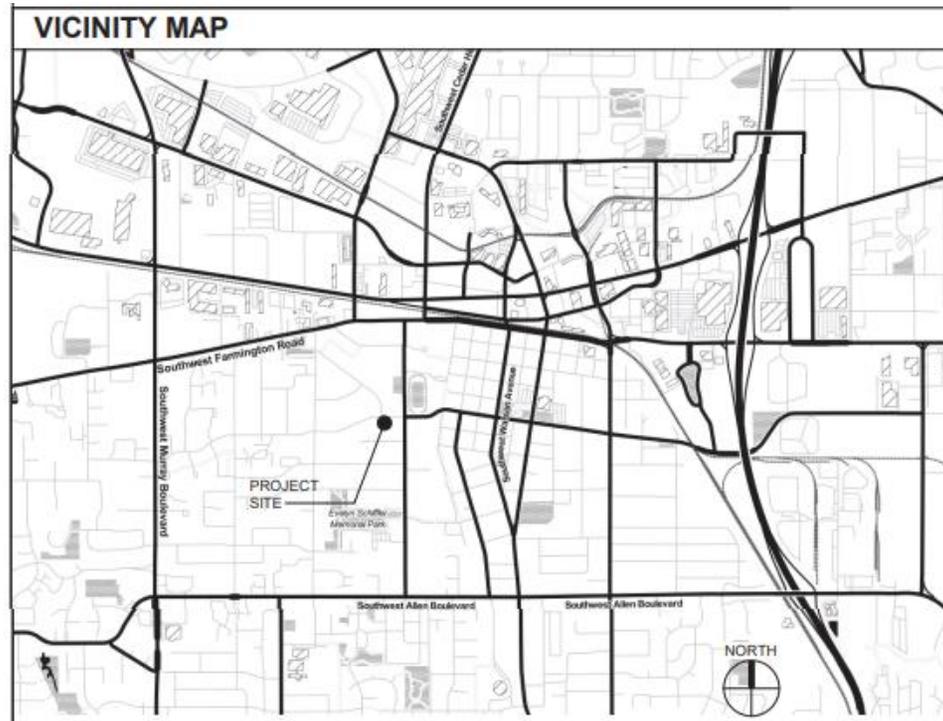
The City of Beaverton Local Implementation Strategy (LIS) included leveraging three publicly owned sites, The Mary Ann, Scholls Ferry, and Elmonica. These three sites are in areas near mass transit, schools and other amenities. The South Cooper Mountain project is in an emerging area next to Mountainside high school, green space and highly valued homes with no affordable housing nearby. During the city's LIS community engagement process, emerging needs included the following:

- Lower barrier access to housing
- Senior housing
- Family-sized housing
- Housing accessibility for seniors and non-abled body residents

We are currently projecting exceeding the number of family-sized and deeply affordable (30% AMI) units. Project solicitations include universal design and strategies to lower screening criteria requirements.

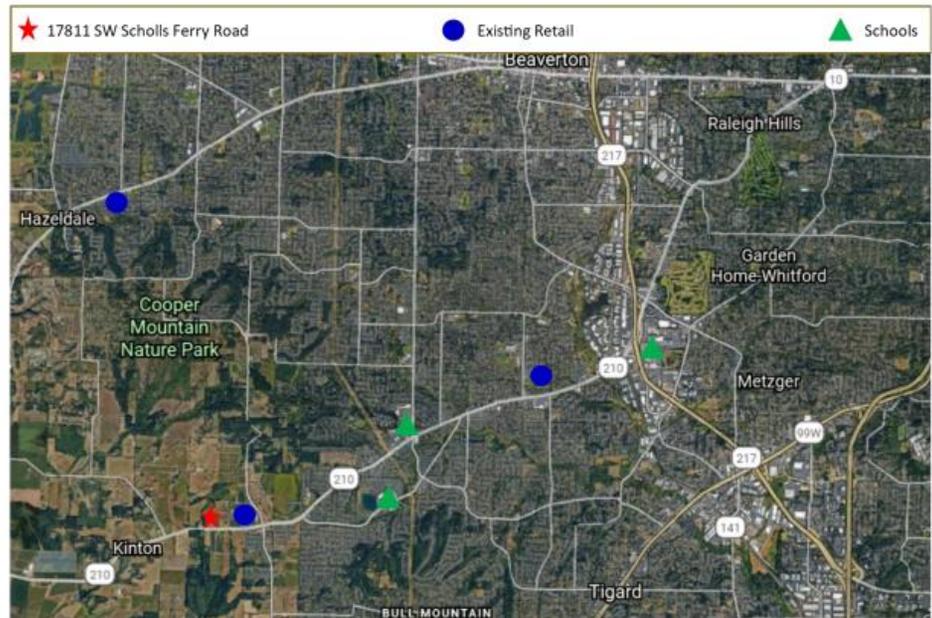
For description of amenities near the Mary Ann, Scholls Ferry, and Elmonica, refer to project highlights in Section 2.

For the Mary Ann, the screening criteria was modified to allow potential tenants previously prevented from benefiting from affordable housing units. In addition, Bienestar, who provides resident services for the Mary Ann, and provide culturally specific, bilingual services to the Latinx residents of the Mary Ann, can support and provide culturally responsive services to the Mary Ann community. REACH has developed highly inclusive and effective leasing plans that recognize the community's strong engagement and inherent expertise. The lease up process began in the fall of 2021 and city staff was actively engaged in the lease up process to ensure increased accessibility to new units. The list of partners includes but are not limited to the Neighborhood Associations Committees (NAC's), culturally specific-led Rent Assistance Collaboration group, Beaverton library staff, the Housing Supportive Services Network, the Community Services program at the City of Beaverton, the Housing Technical Advisory Group, and the Beaverton Inclusive Housing cohort were engaged in outreach efforts. Marketing and communication efforts include the delivery of press releases, City of Beaverton website marking, and media day exposure.



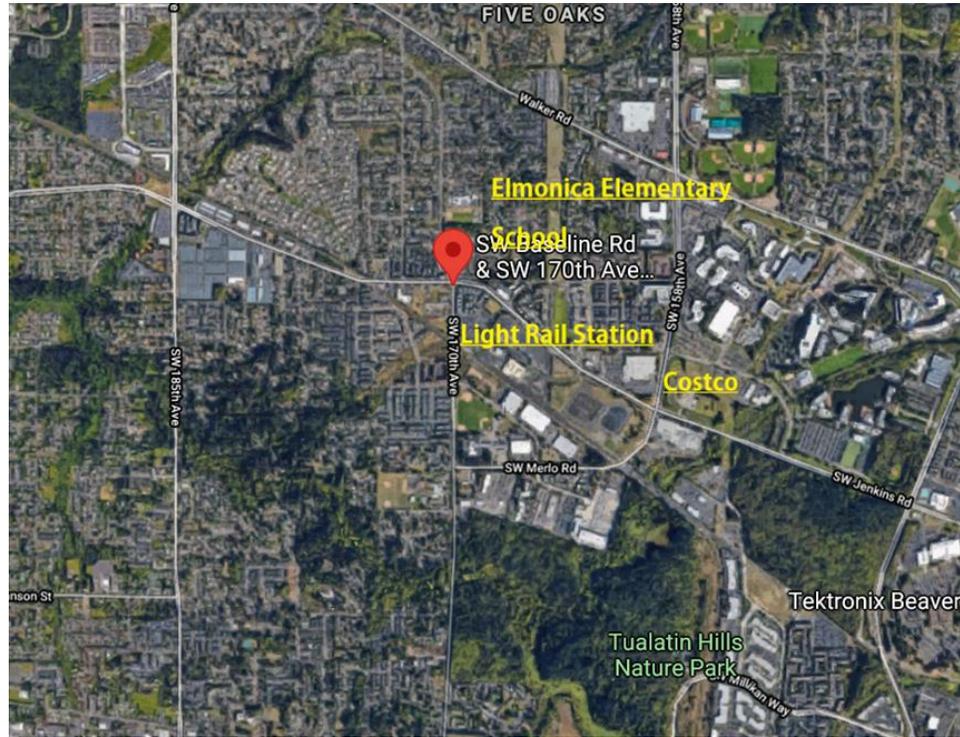
Wishcamper states the project will provide equitable access, low barrier to entry screening, a consistently applied policy to override the screening criteria, and linguistically and culturally appropriate materials and services that reflect community demographics.

The outreach team will deploy a sophisticated yet grass roots community outreach model to ensure that the housing opportunity reaches the Priority Populations, Latinx and Asian, and communities of unequal opportunity, taking into consideration communication, learning, and cultural barriers that often exist. The Outreach and Marketing Plan will be written by IZO Public Relations & Marketing, with collaboration from the Outreach Team and stakeholders local to Beaverton. Three primary methods will be utilized for outreach: direct contact, traditional marketing, and hosted events. Direct contact relies on finding ways to personally reach individuals and organizations. Hosted events and traditional marketing tactics are useful outreach tools in reaching larger groups, provided a minimum level of trust and awareness have been established within the local Hispanic community.



REACH’s outreach and marketing strategy for the building will be centered on culturally responsive and accessible information that offers low barrier tenancy. REACH is unique among Oregon’s affordable housing providers, as they self-manage their housing portfolio. The team will be developing preference policies for multi-generational housing options and for homeless youth and families to ensure greater accessibility to these targeted communities.

Information sessions will serve to market the property, explain the application and leasing process, identify, and prevent barriers applicants may encounter, and preemptively provide solutions and/or strategies to navigate them. The team will activate a vibrant word-of-mouth campaign with immigrants, refugees, and communities of color to share awareness for this opportunity through the networks of REACH, Bienestar, and Homeplate Youth Services, and those of its partners in the Racial Equity Collaborative of Washington County and the Somali Empowerment Circle. The team will work with neighborhood organizations to identify local businesses, congregations, culturally specific community centers, and service providers such as Community Vision, major employment and training centers, places of worship, libraries, Black, Indigenous and People of Color-owned businesses, the Andisheh Center, and the Muslim Education Trust



## SECTION 5: COMMUNITY ENGAGEMENT TO INFORM PROJECT OUTCOMES

*In keeping with the Affordable Housing Bond Program include commitments to lead with racial equity, each local implementation strategy defines commitments and strategies for ensuring that people of color and members of other historically marginalized communities are engaged in shaping project outcomes. To ensure that we can measure these outcomes, Metro is encouraging and supporting jurisdictional and development partners in collecting and reporting on demographic outcomes for community engagement. While this data is not expected to be complete/thorough for each project, the goal is to expand best practices for tracking and reporting on demographic outcomes.*

**Describe your progress toward implementing your LIS strategies for ongoing community engagement. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to include the following:**

- a. Briefly summarize community engagement activities used (WHAT YOU DID, e.g., “3 listening sessions, 1 survey,” etc.) and partnerships for community engagement—including completing below table.
- b. Summarize who participated in community engagement (WHO PARTICIPATED, e.g., 79 people participated in community engagement activities for Project X, of whom 92% had low incomes and 64% were people of color)—including completing below table.
- c. Summarize major themes of feedback (WHAT YOU HEARD, e.g., “participants want more large units or garden space,” etc.)
- d. Describe themes in how feedback directly informed project implementation and outcomes (WHAT CHANGED, emphasis on feedback from communities of color and other marginalized groups)
- e. Use table to show number of community-engagement partnerships with community-based organizations. Use narrative to briefly describe partnerships, and outreach strategies used to encourage participation and mitigate barriers.

As an ongoing effort to make community engagement more sustainable within our city work and projects, a lot of our community engagement this year has been with our internal advisory board, the Housing Technical Advisory Group (HTAG), and our Beaverton Inclusive Housing cohort, a partnership with Unite Oregon, a community-based, culturally specific organization. In order to encourage participation and mitigate barriers, meeting times were adjusted to meet the needs of participants, with evening times being more accessible for participants. The cohort was provided stipends for attending meetings and community events. In addition, the cohort were provided interpreter accommodations and technology assistance.

Since the Mary Ann project was in the construction phase for most of 2021, our efforts were directed towards sharing about this project to the community, through HTAG (a building tour and 1 meeting) and our cohort (1 meeting), and through media press releases and a media day, including outreach to community partners and providers. 9 members, 5 who identified as Black, Indigenous, or Person of Color, were engaged with the Housing Technical Advisory Group. 12 members, all which identify as Black, Indigenous, or Person of Color, were engaged with our Beaverton Inclusive Housing cohort.

During 2021, the Scholls Ferry project was primarily in its pre-bid phase, which included outreach efforts to MWESB subcontractors, through trade associations and local outreach, direct contact, MWESB consultant-direct contact, pre-bid outreach meetings. In addition, this project was presented to HTAG (2 meeting) and the cohort (1 meeting) members, to raise awareness and understanding of this project. P3 consulting is the strategic outreach consultant supporting this project to assure equity and culturally specific community engagement and communication efforts are being conducted.

With the Elmonica Project, with the support of REACH CDC and Salazar Architects, focus groups were conducted to inform the design of the project to be more equitable and inclusive. Community partners, such as Somali Empowerment Circle (9 participants), Bienestar(7 participants), HomePlate Youth Services (6 participants), HTAG and the Beaverton Inclusive Housing cohort (City of Beaverton), were able to bring community members to the table to participate and give their input and perspectives. For the City of Beaverton focus group, 3 members (2 white females and 1 Latinx female) from HTAG and 1 member (non-binary, multiracial and disabled) from the cohort participated. For future engagement, more efforts should be made to provide interpreter accommodations to assure more participation from ethnic and cultural groups within the focus group engagement process.

Major themes that came out of the City of Beaverton focus group were:

**Focus Group #3 City of Beaverton (5 participants):**

**e. Landscape approach**

- **Plaza** – opinions split between curvilinear design with seating and linear design with trees. Curvilinear, because has resemblance with Zen garden. And linear design as provides more trees and has more accessibility for people with disabilities.
- **Festival street** – Possibility of having mural/creative parking striping and market at festival street were the most appealing to participants.
- **Furnishing** - Opinion of site furnishing split between combination of fixed and movable site furniture as it provides siting flexibility and allows gathering of smaller or larger groups and fully movable furnishing due to accessibility and rearrangement options.
- **Play area** - Opinion on playground design was almost unanimous. Colored topography playground will provide more fun activities for children.

Additional comments: Parking is in big demand. Assigned parking would be preferred as caregivers, food delivery never can find space to park. A lot of people have little respect to accessible parking.

**f. Apartment layout**

- **Multigenerational living** – Everyone agreed that it's a good idea.
- **Kitchen** - Majority preferred u-shaped kitchens as they provide more counter, storage space and seating area. One person said that for person in wheelchair u-shaped kitchen can get beaten up very fast and she prefers straight.
- **What is most important in apartment** - Participant's opinion split between storage, size of the rooms and natural light. One person mentioned that cooling is very important in changing climate.
- **Unit layout** – everyone agreed that separating bedroom with living space is good idea, No one was against kitchen wall being shared with bedroom.
- **Bike space in unit vs bike shared room** – Shared bike room is preference, as it takes space from the unit.

**g. Indoor Common Area**

- **Would enclosed space withing community room be comfortable for providers or counseling** – Everyone said yes if transparency and privacy is provided.
- **Common areas with visual connection to the outdoors** – everyone agreed that would be a nice feature.
- **Type of art people like to see in common areas** – Participants had different tastes: nature, abstract, sculptural, modern, organic. One participant mentioned that trauma informed art is important.
- **Laundry** – People would prefer to have washer and dryer in units. It was explained that this project can't afford it. Participants said that keyed access, windows, cubbies for storing detergent, folding tables and properly working card/coin machines will make laundry room more comfortable.

**Summary of community engagement partnerships**

	Total community-based organizations	Culturally specific organizations	Faith-based organizations	Other community-based organizations <i>(not culturally specific or faith based)</i>
Number of partnerships	2	1	0	0
List of organizational partners	Unite Oregon, REACH CDC	Unite Oregon	N/A	N/A

**Summary of community engagement outcomes**

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
Housing Technical Advisory Group	9	Y	All	55%	N/A	11%	N/A	N/A	N/A	N/A
Beaverton Inclusive Housing Cohort	12	Y	All	100%	N/A	N/A	24%	N/A	N/A	N/A
Elmonica Project Focus Group	4	Y	0	2	N/A	N/A	N/A	N/A	N/A	N/A

**SECTION 6: CLIMATE RESILIENCE AND SUSTAINABILITY**

*The historic heat wave experienced by the Pacific Northwest in June 2021 made it clear that climate change is not only a challenge for the future; it’s here. How are your projects incorporating cooling strategies to keep people safe as temperatures increase and wildfires that impact air quality become more frequent? More broadly, how is your jurisdiction working with affordable housing developers to support climate resilience and climate smart building strategies? What challenges do you face and what opportunities do you see for regional coordination?*

The Mary Ann was designed without unit cooling systems; nonetheless, REACH is looking for unit-cooling options albeit with limited resources. The Scholls Ferry’s project design includes unit-cooling systems.

Elmonica’s original design mirrors The Mary Ann’s unit system without a cooling system. REACH is currently evaluating various cooling options and costs. A report is expected outlining challenges/opportunities and costs associated with various cooling systems.

# Housing Bond Progress Report for Hillsboro | 2021

*The purpose of this report is to summarize local progress toward implementing local implementation strategies for the Affordable Housing Bond program. At the end of each calendar year, participating jurisdictions submit progress reports to Metro. Reports are reviewed by the Affordable Housing Bond Community Oversight Committee, which is charged with monitoring progress toward unit production and policy goals and ensuring alignment with guiding principles. Metro staff produce an annual report summarizing regional progress across all implementing jurisdictions.*

## SECTION 1: UNIT PRODUCTION AND FUNDING

*This section is intended to provide a summary of projects and units in each jurisdiction's Affordable Housing Bond pipeline and Affordable Housing Bond funding commitments. With the passage of the Supportive Housing Services measure in 2020, many jurisdictions are seeking opportunities to expand unit production, deepen affordability, or increase the number of supportive housing units across the portfolio. With this in mind, we are also tracking plans to leverage SHS funding for rental assistance and/or services.*

***Describe progress toward implementing the development plan in your LIS. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following elements:***

At the end of December 2021, the City of Hillsboro has one project underway, with groundbreaking scheduled for March 30, 2022. The “Nueva Esperanza” project represents 149 new affordable homes, achieving 52% of Hillsboro’s total production target for Housing Bond implementation, while using approximately 42% of its allocated \$40,657,081 in funding. Of the homes created, 105 will have 2 or more bedrooms, representing 74% of Hillsboro’s target for family-size homes; and 60 will be affordable to households with incomes at or below 30% of area median income (AMI), achieving 51% of Hillsboro’s Housing Bond target for deeply affordable homes.

In addition to contributing \$16.9 Million in Housing Bond funds, Hillsboro is donating approximately 6 acres of City-owned property for the Nueva Esperanza project. The utilization of this City-owned land has presented various development challenges and in 2021, the City worked extensively with the development team on numerous predevelopment activities and issues to help ensure a successful project.

Throughout 2021, Hillsboro has also worked closely with Metro Land Acquisition Staff to help acquire properties for Hillsboro’s next bond-funded affordable housing project. As of December 2021, Metro has Purchase and Sale Agreements (PSAs) in place on two adjacent parcels in Hillsboro totaling approximately 2 acres. The City is assisting Metro with site due diligence and will be preparing a project feasibility analysis to determine the project’s potential yield, preferred development program, and anticipated amount of Housing Bond funds necessary to support Hillsboro’s second bond-funded project.

- a. *Results of competitive selections, including who was involved and how LIS criteria were applied and impacted the outcome.*

The competitive selection for the Nueva Esperanza project was conducted through a City Request for Proposals (RFP) issued in March of 2020. The RFP generated proposals from five different development teams, and a committee comprised of City Staff and community members reviewed and scored each proposal based on Hillsboro's LIS. This process, described in detail in last year's Annual Progress Report, led to the selection of culturally-specific nonprofit developer Bienestar and Housing Development Center (HDC) as Co-Developers for the project. Concept Endorsement was awarded by City Council in November 2020.

- b. *Strategies/outcomes supporting efficient use of Metro bond funds and other sources of public funding in the project; including how projects are responding to increases in LIHTC equity or other additional funding to increase sustainability, durability, and livability for residents, or to reduce the amount of Metro bond subsidy*

For the Nueva Esperanza project, the donation of City-owned land of over 6 net acres, appraised at over \$5.3 Million, is a key City-led outcome supporting efficient use of Metro bond funds. An increase of LIHTC equity helped offset a significant increase in construction costs since Concept Endorsement, without the need for the project to request additional bond subsidy.

- c. *Summary of ongoing funding commitments for project-based rental assistance and ongoing supportive services not included within the project's resident services budget; including how Metro 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.*

The Nueva Esperanza Project will leverage 8 Project-Based Vouchers (PBVs) supporting very-low income residents in addition to 52 "unassisted" units at 30% AMI for very low-income households. The project sponsor will explore use of SHS funding post financial close for potential Supportive Housing Services (SHS) programming in addition to operationalized resident services.

- d. *Approach and anticipated timelines for achieving remaining unit production targets, including any priorities for remaining unit production targets. (e.g., location priorities, homeownership, supportive housing etc.)*

With Nueva Esperanza delivering 149 of Hillsboro's 284-unit total production target, there are 135 units remaining for Hillsboro's total production target under the Housing Bond.

Contingent on closing purchase of the two parcels under contract as described above, a competitive joint-solicitation for Hillsboro's second bond-funded affordable housing project will be conducted by the City and Metro in the coming 6-8 months of 2022, with developer selection and a funding commitment anticipated in late 2022 or early 2023.

Preliminary analysis shows the subject sites will deliver a project of approximately 60 units, leaving 75 units remaining for Hillsboro to meet its production targets. Hillsboro is now working with real estate brokerage firm Colliers International with the intent to acquire an additional publicly-owned parcel(s) to accomplish and/or exceed the production targets within the term of the Intergovernmental Agreement (IGA) with Metro.

**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>				Plans to leverage Supportive Housing Services (SHS) funding <i>(yes/no/TBD)</i>		Status  <i>Concept, final approval, construction, complete</i>	Construction start <i>(anticipated or actual)</i>	Completion  Month/ Year
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units	For rental assistance	For wraparound services			
Nueva Esperanza	\$53,622,987	\$16,940,731	149	60	105	8			Final Approval	March-2022	Nov-2023
<b>Total committed or underway</b>		<b>\$16,940,731</b>	<b>149</b>	<b>60</b>	<b>105</b>	<b>8</b>					
<b>LIS commitment</b>		<b>\$40,657,081</b>	<b>284</b>	<b>117</b>	<b>142</b>						
<b>% of commitment complete</b>		<b>42%</b>	<b>52%</b>	<b>51%</b>	<b>74%</b>						
<b>Remaining for LIS</b>		<b>\$23,716,350</b>	<b>135</b>	<b>57</b>	<b>37</b>						

## SECTION 2: 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 brief 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. Funding sources leveraged*
- d. Noteworthy features or highlights (e.g., community space, free wi-fi, accessibility features, childcare, climate resilience and sustainability)*
- e. Anything else worth highlighting*

Nueva Esperanza will provide 149 new affordable homes and one unrestricted manager's unit across 12 residential buildings and one central community building. Units will serve households earning 30-60% of AMI. With 105 family-size units of 2 bedrooms or more, the project will focus on serving low and very-low income families of color, particularly Latinx, Somali and other immigrant communities. The project features 46 three-bedroom units and 4 four-bedroom units for larger families.

The design organizes the buildings into three distinct neighborhoods that have their own unique identities. By creating smaller neighborhoods within the larger project, Nueva Esperanza will foster a sense of community for residents. The project site design integrates pedestrian circulation into the existing neighborhood, promotes active pedestrian connections along NE 53rd Ave and Hidden Creek Drive, minimizes vehicular impact, preserves mature trees, and achieves Earth Advantage Gold Certification. An *Alameda* (tree lined community pathway) will anchor the project to nature and create a natural backdrop for the north and south portions of the site. Buildings are organized along the vehicular streets and generously sized plazas, providing ample distance between structures and ensuring that outdoor amenities have access to sun. The project will have a total of 169 parking spaces (1:1.11 ratio), of which eight are designated for ADA parking and two for loading, and a total square footage of 140,960.

The *Nueva Esperanza* Development Team of Bienestar, HDC, Scott | Edwards Architecture, and LMC Construction is a capable and highly collaborative team that first came together in 2018 to tackle a difficult rehab project at the Bienestar-owned Montebello Apartments in Hillsboro. S|EA, HDC, LMC Construction, and NW Real Estate Capital Corporation (NWRECC) all have a strong track record of racial equity. For this project, each of these four organizations has adopted a culturally specific lens. S|EA has designed *Nueva Esperanza* with cultural specificity and to be responsive to communities of color; HDC recognizes its role as consultant and partner and leans into listening to the community and those with lived experience during the development.

The project leverages \$16,940,731 of Hillsboro share of Housing Bond funds with non-competitive 4 percent LIHTC equity, tax exempt bonds, private bank financing, and an OHCS Multifamily Energy Program grant. Meyer Memorial Trust has also provided support for the Nueva Esperanza project and has granted \$300,000 in predevelopment funds to the project in addition to a \$750,000 loan for predevelopment from Community Housing Fund (CHF).

The Nueva Esperanza development team has focused on elements that enhance community building and support individual needs. The design elements that have been incorporated into the project, which enhance livability and accessibility, include:

- Community courtyards are located within each cluster of residential buildings. Front doors open onto courtyards with areas to sit or to gather. Each courtyard provides a play area, a barbecue and picnic tables, walking paths, lighting and a distinct character.
- The required Type A (accessible) units are located within various buildings across the site with ADA parking as close to the designated unit as possible.
- The project includes flats as well as townhouse units which allows for diversity in accessibility.

- Two-bedroom units include a bathroom with a lavatory separated from a toilet/bathtub to allow a family member to use the sink while another family member is bathing.
- Three- and four-bedroom units include one bathroom with a bath and one bathroom with a shower.
- Blocking is provided in all bathrooms that will allow for future grab bars if the need arises.
- Kitchens include generous pantry units that enhance livability and reach space.

### SECTION 3: ADVANCING EQUITABLE OPPORTUNITY IN PLANNING AND CONSTRUCTION

*In keeping with the guiding principle of leading with racial equity, local implementation strategies include commitments to advance racial equity through the planning and construction process, including goals for the amount of contract dollars (hard and soft costs) that will be paid to COBID-certified Minority, Women, and Emerging Small Business (MWESB) firms and strategies for encouraging inclusion of women and people of color in the workforce. Goals and tracking commitments for workforce diversity vary across jurisdictions and projects. Within three months of construction completion, each project will report on contracting outcomes and those tracking workforce diversity will report on workforce outcomes. This data will be included in future annual progress reports.*

***Describe progress toward implementing the equitable contracting and workforce strategies described in your LIS. Be sure to address the following elements:***

*a. Progress toward achieving the equitable contracting goals and strategies in your LIS*

Hillsboro’s LIS currently calls for a contracting goal of 20% of *total* project costs to MWESB-DV, COBID-certified businesses. This is more extensive than only setting a contracting goal based on hard construction costs or separating out soft costs. Hillsboro’s equitable contracting goal, based on total project costs, increases the contracting dollars to certified firms.

The Nueva Esperanza project total project cost is \$53.6 Million. Bienestar and HDC have committed to working to achieve the goal of 20% of these total costs for contracting to COBID-certified businesses in alignment with Hillsboro’s LIS. For Nueva Esperanza, that goal is quantified at \$10.7 Million in equitable contracting dollars.

*b. Progress toward advancing the workforce diversity goals and strategies in your LIS*

Due to limited current capacity for workforce tracking and compliance, Hillsboro did not set workforce diversity goals and strategies in its LIS.

*c. If applicable, work complete or underway to expand local capacity to monitor and report on contracting and workforce outcomes*

Hillsboro has purchased B2Gnow software for tracking MWESB-DV equitable contracting goals and has hired the City’s first Diversity Supplier Administrator to help launch a diversity supplier program for City contracting and procurement.

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

Project name	Developer, General contractor	Contracting goals % of total contract amounts paid to...		Notes and preliminary progress
		Project goal (% hard costs)	Project goal (% soft costs)	
Nueva Esperanza	Bienestar,HDC/ LMC	20%		Hillsboro LIS calls for a goal of 20% of total project costs to COBID-Certified firms.

*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	Workforce goals % of total labor hours* worked by...			Workforce tracking?	Prevailing wage	Notes and preliminary progress
		POC	Women	Apprentices	Y/N	BOLI, Davis Bacon, N/A	
Nueva Esperanza	Bienestar,HDC/ LMC						N/A at this time

*For projects that provided a minimum and maximum (or “stretch”) goal, please use the “minimum goal.” Workforce tracking is recommended for contracts above \$250,000.*

## SECTION 4: ADVANCING EQUITABLE HOUSING OPPORTUNITY, ACCESS, AND STABILITY

*The guiding principles for the Affordable Housing Bond Program include commitments to lead with racial equity and to create opportunity for those who have been left behind by the region’s housing market, especially communities of color, families with children and multiple generations, people living with disabilities, seniors, veterans, households experiencing or at risk of homelessness, and households at risk of displacement. Each local implementation strategy defines commitments and strategies to ensure affirmative marketing, low-barrier lease up practices, and culturally responsive programming—in addition to location priorities that affirmatively further fair housing and support community stability for those who have experienced displacement or risk of displacement. Once projects begin to lease up, data will be collected to report on marketing and lease up metrics and demographics of the initial resident population.*

**Describe progress toward implementing your LIS strategies for supporting fair housing access and community stability through project locations, affirmative marketing strategies, and lease up. Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to address the following:**

- a. *How locations of selected projects supported the location strategy described in your LIS, and any location priorities for future solicitations (feel free to include a map if you can)*

Hillsboro's LIS calls for new affordable housing development in opportunity-rich neighborhoods, with priority in areas currently not served by existing affordable housing projects and resources. The Nueva Esperanza site on NE 53<sup>rd</sup> Ave and Hidden Creek is ideally located for the creation of a new, affordable neighborhood taking advantage of the City of Hillsboro's local parks amenities. Adjacent to the site is a brand new community center, and the 53<sup>rd</sup> Avenue Community Park complex. High frequency light rail transit at the MAX Hawthorne Farm station is only 1/2 mile north of the site and Bus #47 on Baseline road to the south. Additional open space and recreational areas are within walking distance east and west of the site. A Neighborhood commercial district, including a pharmacy and medical office are within walking distance. The closest existing affordable housing is in the Orenco Neighborhood, some 2 miles in distance. Thus Nueva Esperanza is filling an unmet need for affordable housing in the 53<sup>rd</sup> Avenue corridor.

Future Housing Bond solicitations will also align with Hillsboro's LIS, prioritizing service-rich neighborhoods with priority for those not containing existing regulated affordable housing opportunities.

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

Affirmative Marketing: Bienestar, HDC, and partners will create and carry out a comprehensive, multi-lingual marketing and lease-up plan that ensures racial and economic equity is achieved, that all classes of disadvantaged populations will have equal and fair access to rent units at *Nueva Esperanza*, and that the project is furthering affordable housing choice in Hillsboro. Bienestar and NWRECC will comply with fair housing law and regulations, as evidenced by the Affirmative Fair Housing Marketing Plan (AFHMP) developed for the project. The affirmative marketing plan consists of the following components:

Dissemination of Multi-lingual Marketing Materials - Bienestar will develop marketing materials that reach lower-income predominantly monolingual and limited-English Spanish-speaking households and lower-income African and other immigrant populations in and around eastern Hillsboro to ensure that they are aware and informed of *Nueva Esperanza* leasing availability. Bienestar will work with partners in the Racial Equity Collaborative, the Hillsboro School District, the Immigrant Solidarity Collaborative, the Somali Empowerment Circle, Adelante Mujeres, Family Promise, Community Action, and others to ensure that information is distributed to other communities of color in the area and will produce leasing and other informative materials in other languages as needed, including Somali, Arabic, Slavic, Vietnamese and Tagalog.

Bienestar historically markets availability of units with a racial equity lens, employing the following strategies:

- Communication with or in-person visits to major employment centers
- Communication through its peer network of other community service providers that work with Latinx and other diverse populations
- Flyers and direct communication at places of worship, libraries, and stores owned by Latinx entrepreneurs or frequented by Latinx target populations
- Word of mouth via Community Connectors as part of their normal volunteer activities and in their respective places of work and direct referrals from our 2,000 tenants from among their social and professional networks.

Low-Barrier Tenant Screening: As a longtime developer, owner and operator of affordable multifamily properties in Washington County, Bienestar targets the area's largest and most at-risk population of color, Latinx farmworkers and working families (95 percent of Bienestar tenants are Latinx), to ensure even the most financially disadvantaged in our community have access to quality homes (all Bienestar units are reserved for 60% percent AMI or below). In preparation for serving Hillsboro's diverse community, Bienestar has worked with local service agencies and PSH providers to create an improved low-barrier and equitable screening process for all applicants. In speaking with these partners (Community Action, Family Promise and Somali Empowerment Circle) and supportive housing experts (Sequoia Mental Health), it is clear that traditional screening criteria fails to account for known barriers tied to socioeconomic identities. Examples of these common barriers include negative credit history, past evictions, income inefficiency, and criminal records. Bienestar has strived to address these through common sense changes. One such change is that Management will not deny an applicant for negative rental history or prior evictions if it was based on excessive rent burden (household paying more than 50 percent of its total monthly income for rent and utilities). Additionally, the criminal conviction review process has removed any crimes that are no longer illegal at the State or Federal level. Furthermore, applicants will be encouraged to provide professional letters to assist in the review process. For every aspect of the screening criteria, Bienestar and NWRECC will consider relevant individualized evidence of mitigating factors, and approach each review through the lens of equity.

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

While Nueva Esperanza does not include formal permanent supportive housing (PSH) units, the project Sponsors will be coordinating with organizations such as Family Promise, Community Action, Sequoia Mental Health, Community Connect and other resources in Washington County for coordinated referrals as applicable.

*d. Plans and partnerships to align culturally specific/responsive programming and services to meet the needs of tenants.*

Stable housing and a rich sense of community while aspiring to a better future is the framework for the resident services plan at *Nueva Esperanza*. Bienestar's flagship Promotores/Community Connectors Program is the cornerstone of Bienestar resident services model. This program recruits and empowers resident leaders (Promotores) who act as "community connectors," doing home visits and providing residents

with referrals to relevant services. Resident services staffing will be provided on-site through the operating budget (1.0 FTE Resident Services Coordinator, as well as a part-time Community Services Director, and three Promotores).

Bienestar will leverage a wide array of services for *Nueva Esperanza* residents through strong partnerships with more than 10 community-based organizations, including Virginia Garcia Memorial Health Center, Community Action, Centro Cultural, Adelante Mujeres, multiple departments of the City of Hillsboro, Washington County and others. Given the history of western Washington County and Hillsboro, many of the established CBOs have their roots in the Latinx community. However, as the demographics of our community shift, Bienestar, and these other organizations, are shifting their missions and services to be able to serve an increasingly diverse, multi-cultural population. Throughout the year, partner organizations give presentations on their services to help the Promotores/ Connectors make the best possible referrals for residents. Services provided by the partners include:

- Promotores/Connectors Information and Referral: 10+ local service organizations: Community Action, Virginia Garcia Memorial Health Center, and others.
- Homeownership Counseling and Financial Capabilities: National Association of Latino Community Asset Builders (NALCAB), Adelante Mujeres, Credit Builders Alliance, ProudGround and Portland Housing Center
- Student matched IDAs, Homeownership IDAs: CASA of Oregon,
- Summer enrichment (nature walks, Explorador camp, summer lunches, Back to School Fairs): Audubon Society of Portland; Clean Water Services; Portland Zoo; others
- Monthly Community-Building Events (i.e. family friendly games, holiday events, etc.): Various providers
- Informative Presentations: Adelante Mujeres, Virginia Garcia Memorial Health Center, Hillsboro School District, others
- Leadership, Empowerment, and Advocacy Metropolitan Alliance for the Common Good, Welcome Home Coalition, Housing Alliance, Washington County Racial Equity Collaborative

***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 responsive services
Nueva Esperanza	Low & Very low-income families and communities of color	Multi-lingual marketing materials, peer network communications and referrals, recruitment at employment centers, word of mouth within Latinx and other immigrant communities	Bienestar Promotores model for resident services. Partnerships with Virginia Garcia Memorial Health Center, Community Action, Centro Cultural, Adelante Mujeres, City of Hillsboro, Washington County and others

## SECTION 5: COMMUNITY ENGAGEMENT TO INFORM PROJECT OUTCOMES

*In keeping with the Affordable Housing Bond Program include commitments to lead with racial equity, each local implementation strategy defines commitments and strategies for ensuring that people of color and members of other historically marginalized communities are engaged in shaping project outcomes. To ensure that we can measure these outcomes, Metro is encouraging and supporting jurisdictional and development partners in collecting and reporting on demographic outcomes for community engagement. While this data is not expected to be complete/thorough for each project, the goal is to expand best practices for tracking and reporting on demographic outcomes.*

***Describe your progress toward implementing your LIS strategies for ongoing community engagement. . Please highlight any best practices, lessons learned, or opportunities for improvement. Be sure to include the following:***

- a. *Briefly summarize community engagement activities used (WHAT YOU DID, e.g. “3 listening sessions, 1 survey,” etc.) and partnerships for community engagement—including completing below table.*

Bienestar conducted ongoing meetings with a Latinx Project Advisory Committee to inform everything from project name to design and approach. Bienestar met regularly with resident focus groups and members of the Somali Empowerment Circle to include feedback on design and other project elements. In addition, Bienestar in partnership with Adelante Mujeres conducted an online survey to receive project feedback. Finally, the developer also interfaced with organizations such as Community Action, Sequoia Mental Health, and Family Promise on feedback related to resident services, referrals and marketing.

- b. *Summarize who participated in community engagement (WHO PARTICIPATED, e.g. 79 people participated in community engagement activities for Project X, of whom 92% had low incomes and 64% were people of color)—including completing below table.*

31 community members in total participated in community engagement for Nueva Esperanza. All participants identified as people of color and over 60% percent identified as low-income residents living in affordable housing.

- c. *Summarize major themes of feedback (WHAT YOU HEARD, e.g. “participants want more large units or garden space,” etc.)*

Major feedback themes for Nueva Esperanza centered on project unit design and overall amenities. Some examples include:

- Having both shower and baths in a unit is favored
- Kitchen and living rooms should be separated- with a barndoor-style partition preferred
- The dining room should be closer to the laundry hook ups to multitask

- Add outdoor cooking area and benches
- More outdoor lighting for safety

d. Describe themes in how feedback directly informed project implementation and outcomes (WHAT CHANGED, emphasis on feedback from communities of color and other marginalized groups)

As a result of feedback from culturally-specific communities of color, the following design adjustments were made:

- 2 bathrooms placed in 3 & 4-bedroom units.
- 3 and 4 bedrooms will have washer dryer hook ups placed by kitchen and dining areas for easier multitasking
- A partition will be placed between the kitchen and living room for 3 and 4 bedrooms
- Moveable furniture in the laundry room and community room to create a comfortable waiting area
- Changed leasing office to have two entries/exits to address safety concerns
- Community space layout changed with a separate access to the community kitchen
- Laundry room larger
- Art or mural wall for foyer will be included
- Windows/lighting in community room and kitchen were added
- An outdoor cooking area was added
- Outdoor benches were included
- Play areas were separated by age level

e. Use table to show number of community-engagement partnerships with community-based organizations. Use narrative to briefly describe partnerships, and outreach strategies used to encourage participation and mitigate barriers.

**Summary of community engagement partnerships**

	Total community-based organizations	Culturally specific organizations	Faith-based organizations	Other community-based organizations <i>(not culturally specific or faith based)</i>
Number of partnerships				
List of organizational partners	5	Adelante Mujeres, Somali Empowerment Circle		Family Promise, Community Action, Sequoia Mental Health



**Summary of community engagement outcomes**

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 homelessness
Nueva Esperanza	31	Y*	31	100	61	NC	NC	NC	NC	NC

Yes, but not all categories outlined in the chart were included. These are marked with NC meaning Not-Collected.

**SECTION 6: CLIMATE RESILIENCE AND SUSTAINABILITY**

*The historic heat wave experienced by the Pacific Northwest in June 2021 made it clear that climate change is not only a challenge for the future; it’s here. How are your projects incorporating cooling strategies to keep people safe as temperatures increase and wildfires that impact air quality become more frequent? More broadly, how is your jurisdiction working with affordable housing developers to support climate resilience and climate smart building strategies? What challenges do you face and what opportunities do you see for regional coordination?*

Hillsboro and the Nueva Esperanza development team have approached the issue of sustainability as one that will keep our most vulnerable community members safe while also delivering an efficient project that can be well-maintained long into the future. The project is committed to meeting an Earth Advantage, gold standard. Nueva Esperanza is tracking towards a platinum standard based on the use of (among other features) durable materials; efficient lighting, heating and exhaust systems; and increased insulation values. In addition, the project will install solar panels to support the electrical needs of the house panel (which will including lighting for the site, common spaces and community building).

To further address the region’s changing climate, Nueva Esperanza units are equipped with options to provide cooling for the residents. After considering a number of factors including utility costs, long-term maintenance, construction cost, resident choice and comfort the development team has included the following cooling strategies for the project:

- A packaged terminal heat pump (PTHP) will be installed underneath each living room window providing air conditioning into the living/cooking spaces. Based on the energy model, this device will typically cool the main living areas and provide respite when the rest of the unit might get warm.

- Ceiling fans will be installed in every bedroom. While a ceiling fan does not contribute to cooling in the energy model, it does contribute to a feeling of comfort when someone is in the room.
- Bedroom window ports are included in the project budget as a construction add-back item. VPI Quality Windows: Endurance Windows have been specified, which includes an optional AC window port that fits within the screen frame of the casement windows. All bedroom units have the same size casement window, which should make it easy for Property Management to remove the screen and install a window port as requested by residents. If an AC window port is in place, the portable air conditioning unit will be provided by the resident. The electrical engineer has verified that the available load for the unit will support a typical portable air conditioning unit in each bedroom. It is expected that the Development Team will add-back into the project a percentage of window ports based on perceived need and project budget.

The City of Hillsboro is in agreement with Metro in prioritizing cooling plans for all bond-subsidized affordable housing projects. Future solicitations for Hillsboro projects will require a specific description of cooling strategies which will be evaluated as part of the project selection process.

# METRO HOUSING BOND QUARTERLY REPORT | OCTOBER-DECEMBER 2021

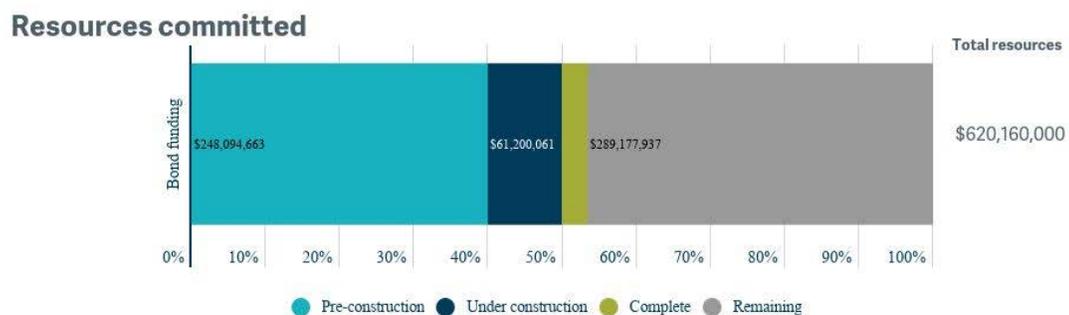
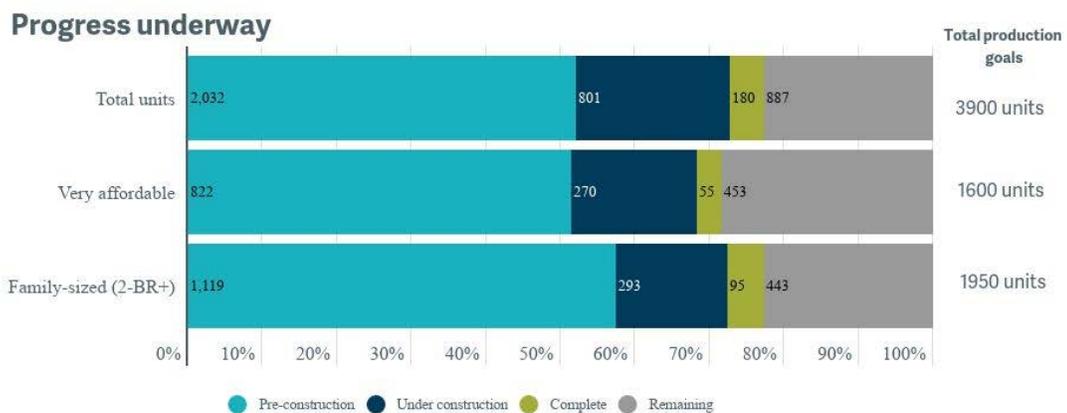
February 23, 2022

*This is the fourth quarterly progress report for the Metro Affordable Housing Bond of 2021. Similar reports are produced quarterly with the goal of keeping the Housing Bond Community Oversight Committee, Metro Council, and other stakeholders and partners informed about ongoing implementation progress. A more detailed report will be provided annually for each calendar year, following submission of local progress reports by each participating implementation jurisdiction.*

## REGIONAL PRODUCTION PROGRESS

As of the end of December 2021, the Affordable Housing Bond program has 31 projects representing 3,013 new affordable homes in the pipeline, including sixteen projects (2,032 units) that have received a Metro concept endorsement and are in pre-construction, twelve projects (801 units) that are under construction, and four projects (180 units) that have begun accepting residents. Collectively, the 31 projects in the pipeline represent 3,013 new affordable homes, or 83.6% of the total production target for the Housing Bond, while utilizing approximately 53.3% of allocated project funding. Of these homes, 1,507 will have two or more bedrooms, representing 77.2% of the program’s production goal for family-sized homes; and 1,147 will be affordable to households with incomes at or below 30% of area median income (AMI), representing 71.6% of the program’s production goal for deeply affordable homes.

### Production and funding dashboard



## Regional production progress

	Eligible units	30% AMI units	2+ BR units	PSH units
<i>Total units in pipeline</i>	3,013	1,147	1,507	555
<i>Total unit production targets</i>	3,900	1,600	1,950	N/A
<i>% of unit progress underway</i>	83.6%	71.6%	77.2%	N/A
<i>Total funding committed or underway</i>	\$330,982,063			
<i>% of funding committed</i>	53.3%			
<i>Total funding remaining</i>	\$289,177,937			

## LOCAL PRODUCTION PROGRESS

### Portland

Name	Metro Bond Funds	Status	Eligible units	30% AMI units	2+ BR units	PSH units	Anticipated Completion
Hattie Redmond/Baldwin PSH	\$4,411,737	Construction	60	60	0	60	Oct-2022
Dekum	\$22,910,240	Pre-construction	147	61	78	0	Jan-2025
Findley Commons	\$1,945,175	Complete*	35	0	0	35	Dec-2021
Waterleaf/Riverplace	\$1,739,219	Construction	176	17	48	20	Jul-2022
74th and Glisan	\$19,972,884	Pre-construction	137	56	63	41	May-2024
5020 N Interstate	\$9,363,137	Pre-construction	64	18	48	0	Jul-2023
Albina One	\$13,572,107	Pre-construction	94	32	54	0	Sep-2024
Meridian Gardens/Cedar Commons II	\$12,435,416	Pre-construction	85	70	0	65	Feb-2024
Hollywood Hub	\$29,084,328	Pre-construction	199	69	129	0	Jul-2024
PCC Killingsworth	\$2,538,237	Pre-construction	84	28	60	0	Aug-2024
Tilistial Village	\$3,511,176	Pre-construction	24	24	22	16	Dec-2023
<i>Total units in pipeline</i>			<b>1,105</b>	<b>435</b>	<b>502</b>	<b>237</b>	
<i>Total unit production targets</i>			<b>1,475</b>	<b>605</b>	<b>737</b>	<b>300</b>	
<i>% of commitment complete</i>			<b>74.9%</b>	<b>71.9%</b>	<b>68.1%</b>	<b>79%</b>	
<i>Total committed or underway</i>			<b>\$121,483,656</b>				
<i>Total LIS funding</i>			<b>\$211,056,579</b>				
<i>% of funding committed</i>			<b>57.5%</b>				
<i>Remaining LIS funding</i>			<b>\$89,572,923</b>				

**Washington County**

Name	Metro Bond Funds	Status	Eligible Units	30% AMI units	2+ BR units	PSH units	Anticipated Completion
Aloha Housing Development	\$10,230,000	Pre-construction	81	33	50	0	Apr-2023
Aloha Quality Inn	\$8,465,000	Construction	54	54	0	54	Jun-2022
Plambeck Gardens/ <i>Basalt Creek</i>	\$14,320,000	Pre-construction	116	47	60	8	Jun-2024
Goldcrest/ <i>Cooper Mountain</i>	\$8,700,000	Pre-construction	74	14	45	0	Apr-2023
Plaza Los Amigos	\$12,830,000	Pre-construction	112	26	72	16	Jun-2023
Saltzman Road	\$5,400,000	Pre-construction	53	28	9	24	Jul-2023
Terrace Glen	\$17,484,000	Construction	144	51	73	3	Jun-2023
The Valfre at Avenida 26	\$3,792,088	Construction	36	8	30	8	Sep-2022
Tigard Senior	\$6,270,000	Pre-construction	57	23	0	23	Sep-2023
Viewfinder	\$11,583,000	Complete*	81	34	56	27	Dec-2021
<b>Total units in pipeline</b>			<b>808</b>	<b>318</b>	<b>395</b>	<b>163</b>	
<b>Total unit production targets</b>			<b>814</b>	<b>334</b>	<b>407</b>	<b>100</b>	
<b>% of commitment complete</b>			<b>99.8%</b>	<b>95.8%</b>	<b>98.3%</b>	<b>N/A</b>	
<b>Total committed or underway</b>				<b>\$99,074,088</b>			
<b>Total LIS funding</b>				<b>\$116,465,532</b>			
<b>% of funding committed</b>				<b>85.1%</b>			
<b>Remaining LIS funding</b>				<b>\$17,391,444</b>			

**Clackamas County**

Name	Metro Bond Funds	Status	Eligible units	30% AMI units	2+ BR units	PSH units	Anticipated Completion
Fuller Road Station	\$8,570,000	Construction	99	25	82	25	Aug-2022
Good Shepherd Village	\$18,330,000	Pre-construction	141	58	79	35	Aug-2023
Maple Apartments	\$15,903,000	Pre-construction	171	70	129	9	Dec-2023
Tukwila Springs/ <i>Webster Road</i>	\$5,548,542	Construction	48	48	0	48	Jun-2022
<b>Total units in pipeline</b>			<b>459</b>	<b>201</b>	<b>290</b>	<b>117</b>	
<b>Total unit production targets</b>			<b>812</b>	<b>333</b>	<b>406</b>	<b>0</b>	
<b>% of commitment complete</b>			<b>56.5%</b>	<b>60.3%</b>	<b>71.4%</b>	<b>N/A</b>	
<b>Total committed or underway</b>				<b>\$48,351,542</b>			
<b>Total LIS funding</b>				<b>\$116,188,094</b>			
<b>% of funding committed</b>				<b>41.6%</b>			
<b>Remaining LIS funding</b>				<b>\$67,836,552</b>			

## Hillsboro

Name	Metro Bond Funds	Status	Eligible units	30% AMI units	2+ BR units	PSH units	Anticipated Completion
Nueva Esperanza	\$16,940,731	Pre-construction	149	60	105	8	Jun-2023
<b>Total units in pipeline</b>			<b>149</b>	<b>60</b>	<b>105</b>	<b>8</b>	
<b>Total unit production targets</b>			<b>284</b>	<b>117</b>	<b>142</b>	<b>0</b>	
<b>% of commitment complete</b>			<b>52.4%</b>	<b>51.2%</b>	<b>74%</b>	<b>N/A</b>	
<b>Total committed or underway</b>			<b>\$16,940,731</b>				
<b>Total LIS funding</b>			<b>\$40,657,081</b>				
<b>% of funding committed</b>			<b>42%</b>				
<b>Remaining LIS funding</b>			<b>\$23,716,350</b>				

## Gresham

Name	Metro Bond Funds	Status	Eligible units	30% AMI units	2+ BR units	PSH units	Anticipated Completion
Albertina Kerr	\$ 11,189,475	Construction	147	30	31	30	Mar-2022
Rockwood Village/Rockwood 10	\$5,152,030	Complete*	47	47	39	0	Mar-2022
<b>Total units in pipeline</b>			<b>194</b>	<b>77</b>	<b>70</b>	<b>30</b>	
<b>Total unit production targets</b>			<b>187</b>	<b>77</b>	<b>93</b>	<b>0</b>	
<b>% of commitment complete</b>			<b>104%</b>	<b>100%</b>	<b>75%</b>	<b>N/A</b>	
<b>Total committed or underway</b>			<b>\$16,341,505</b>				
<b>Total LIS funding</b>			<b>\$26,756,995</b>				
<b>% of funding committed</b>			<b>61%</b>				
<b>Remaining LIS funding</b>			<b>\$10,431,965</b>				

## Beaverton

Name	Metro Bond Funds	Status	Eligible units	30% AMI units	2+ BR units	PSH units	Anticipated Completion
Mary Ann	\$3,000,000	Complete*	54	11	29	0	Sep-2021
Elmonica	\$11,900,000	Pre-construction	80	33	32	0	Dec-2024
Scholls Ferry Road	\$9,000,000	Pre-construction	164	12	84	0	Oct-2022
<b>Total units in pipeline</b>			<b>298</b>	<b>56</b>	<b>145</b>	<b>0</b>	
<b>Total unit production targets</b>			<b>218</b>	<b>89</b>	<b>109</b>	<b>N/A</b>	
<b>% of commitment complete</b>			<b>136.6%</b>	<b>63%</b>	<b>133%</b>	<b>N/A</b>	
<b>Total committed or underway</b>			<b>\$23,900,000</b>				
<b>Total LIS funding</b>			<b>\$31,140,595</b>				
<b>% of funding committed</b>			<b>76.7%</b>				
<b>Remaining LIS funding</b>			<b>\$7,240,595</b>				

\*Four housing bond projects have opened their doors and are currently accepting residents: Rockwood Village in Gresham, the Mary Ann in Beaverton, the Viewfinder in Washington County and Findley Commons in Portland. While construction is still ongoing, these four projects are in the process of leasing up a total of 180 new housing units

## PROJECT ENDORSEMENTS AND FUNDING APPROVALS

*The following projects were endorsed or approved during the fourth quarter of 2021. Staff reports for these approvals are included in the Quarterly Report Project Approvals Addendum.\*\**

<b>Project</b>	<b>Endorsement/Approval</b>
Elmonica	Concept Endorsement
74 <sup>th</sup> and Glisan	Concept Endorsement
5020 N Interstate	Concept Endorsement
Albina One	Concept Endorsement
Meridian Gardens/ <i>Cedar Commons II</i>	Concept Endorsement
Hollywood Hub	Concept Endorsement
PCC Killingsworth	Concept Endorsement
Tilistial Village	Concept Endorsement
Aloha Inn	Final approval
Good Shepherd Village	Final Approval
Terrace Glen	Final Approval

\*\*Staff reports for projects approved in the fourth quarter can be found at <https://www.oregonmetro.gov/public-projects/affordable-homes-greater-portland/oversight>

# METRO AFFORDABLE HOUSING BOND

Financial Report Through December 2021

## FINANCIAL SUMMARY

<b>TOTAL REVENUE</b>	<b>\$683,399,650</b>
<b>TOTAL EXPENSES and DISBURSEMENTS</b>	<b>\$98,179,364</b>
<b>TOTAL COMMITTED</b>	<b>\$243,211,256</b>
<b>TOTAL FUNDING AVAILABLE</b>	<b>\$342,009,031</b>

## REVENUE

	<b>FY 2018 - 2021</b>	<b>FY 2021 - 2022</b>	<b>TOTAL REVENUE</b>
Bond Proceeds	\$652,800,000		\$652,800,000
Premiums on Bonds	\$2,630,335		\$2,630,335
Interest Earnings	\$25,158,863	\$2,810,452	\$27,969,315
<b>TOTAL REVENUE:</b>	<b>\$680,589,198</b>	<b>\$2,810,452</b>	<b>\$683,399,650</b>

<--- "Premiums on Bonds" and "Interest Earnings" not included in Work Plan Funding

## EXPENSES

PROJECTS	Prior Years Expended or Disbursed	FY2021-22 Expended or Disbursed	Committed -- Not Yet Disbursed	TOTAL EXPENDED, DISBURSED or COMMITTED	WORK PLAN FUNDING	% of Work Plan Funding Expended, Disbursed or Committed
<b>Jurisdiction:</b>						
Beaverton	\$3,000,000	\$0	\$20,900,000	\$23,900,000	\$31,140,595	76.75%
Clackamas County	\$14,118,542	\$0	\$34,233,000	\$48,351,542	\$116,188,094	41.61%
Gresham	\$16,341,505	\$0	\$0	\$16,341,505	\$26,756,995	61.07%
Hillsboro	\$0	\$0	\$16,940,731	\$16,940,731	\$40,657,081	41.67%
Home Forward (East Multnomah Co.)*	\$0	\$0	\$0	\$0	\$15,879,123	0.00%
Portland*	\$3,684,394	\$4,411,737	\$113,387,525	\$121,483,656	\$211,056,579	57.56%
Washington County	\$17,233,000	\$24,091,088	\$57,750,000	\$99,074,088	\$116,465,532	85.07%
Metro Site Acquisition Program	\$4,801,959	\$81,448	\$0	\$4,883,407	\$62,016,000	7.87%
Other Metro Direct Project Costs	\$0	\$7,134	\$0	\$7,134	\$0	N/A
<b>TOTAL:</b>	<b>\$59,179,400</b>	<b>\$28,591,407</b>	<b>\$243,211,256</b>	<b>\$330,982,063</b>	<b>\$ 620,160,000</b>	<b>53.37%</b>

\*Home Forward's Dekum Court project is reflected under the Portland allocation and commitments, since funding for this project was part of the funding initially allocated to City of Portland.

ADMINISTRATIVE	Prior Years Expended or Disbursed	FY2021-22 Expended or Disbursed	TOTAL EXPENDED or DISBURSED	WORK PLAN FUNDING	% of Work Plan Funding Expended or Disbursed
<b>Jurisdiction:</b>					
Beaverton	\$339,016	\$115,118	\$454,134	\$655,591	69.27%
Clackamas County	\$1,467,639	\$0	\$1,467,639	\$2,446,065	60.00%
Gresham	\$140,826	\$168,991	\$309,817	\$563,305	55.00%
Hillsboro	\$342,376	\$171,188	\$513,564	\$855,939	60.00%
Home Forward (East Multnomah Co.)	\$167,148	\$167,149	\$334,297	\$334,297	100.00%
Portland**	\$0	\$0	\$0	\$4,443,296	0.00%
Washington County	\$1,068,690	\$345,450	\$1,414,140	\$2,451,906	57.68%
Metro Site Acquisition Program***	\$0	\$0	\$0	\$1,305,600	0.00%
Metro Accountability and Financial Transaction Costs	\$4,109,109	\$1,805,857	\$5,914,965	\$13,056,000	45.30%
Reserved for Future Allocations				\$6,528,000	0.00%
<b>TOTAL:</b>	<b>\$7,634,804</b>	<b>\$2,773,753</b>	<b>\$10,408,556</b>	<b>\$32,640,000</b>	<b>31.89%</b>

\*\* PHB's Project Delivery Fee is an administrative reimbursement, not paid for by Metro's Affordable Housing Bonds

\*\*\* Metro's Finance and Regulatory Services has determined that Metro Site Acquisition Program expenses are considered Project Expenses