



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Agenda

Meeting: Housing Bond Oversight Committee Meeting
Date: Wednesday, March 30, 2022
Time: 9:00 a.m. to 11:30 a.m.
Place: Virtual meeting ([Zoom link](#))
Purpose: Discuss implementation progress with four jurisdictions.

- 9:00 a.m. Welcome and opening remarks
- 9:20 a.m. Public comment
- 9:30 a.m. Program updates
- 9:45 a.m. Annual progress report: City of Portland
- Discussion prompts for City of Portland, Home Forward and Gresham
 - *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*
- 10:10 a.m. Break
- 10:20 a.m. Annual progress report: Home Forward
- 10:40 a.m. Annual progress report: Metro Site Acquisition Program
- 11:00 a.m. Annual progress report: Gresham
- 11:20 a.m. Next steps
- 11:30 a.m. Adjourn

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Meeting minutes

Meeting: Metro Housing Bond Oversight Committee
Date/time: Wednesday, March 16, 9:00 AM – 12:00 PM
Place: Virtual Meeting (Zoom)
Purpose: Discuss implementation progress with four jurisdictions.

Attendees

Kira Cador, Brandon Culbertson, Mitch Hornecker, Co-chair Jenny Lee, Ann Leenstra, Mara Romero, Co-chair Steve Rudman, Andrea Sanchez, Karen Shawcross, Trinh Tran, Juan Ugarte Ahumada, Tia Vonil

Absent

Melissa Erlbaum, Nicole Stingh

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Ash Elverfeld, Rachael Lembo, Emily Lieb, Jimmy Oporta, 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 opening remarks

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

Co-chairs, Jenny Lee and Steve Rudman welcomed members and thanked them for being at the meeting.

Allison asked the members to respond to the question, “Home is so much more than just our physical location: where is your home located?” Members responded in chat, verbally, and on a Jamboard.

Members confirmed the meeting summary from March 2, 2022.

Allison invited committee members to disclose roles or work they are involved in that may intersect with topics discussed today.

- Ann Leenstra stated that she is the Housing Commissioner for Clackamas County
- Kira Cador stated that her development company, Rembold, is potentially going to work with Hillsboro on a project. It isn't affordable housing.
- Andrea Sanchez stated that her employer, Housing Development Center is a partner on the Nueva Esperanza project in Beaverton. She also said that Housing Development Center is working as a consultant on the Mary Ann project and that she is assigned to the project.
- Brandon Culbertson left a comment in the chat that he may be contracted to do Native American community housing feedback sessions in Washington County and City of Beaverton.

Meeting minutes

Public comment

No written or verbal public comment was received.

Annual progress report: Clackamas County

Devin Ellin, Housing Development Director, Clackamas County (she/her pronouns) joined the meeting as a presenter and provided a brief update on their program progress in 2021. Her responses are italicized.

Jenny asked how they're working to ensure that their investments serve households experiencing homelessness. What opportunities is Clackamas exploring to expand supportive housing services (SHS) integration and permanent supportive housing (PSH) in their portfolio?

- *56 additional permanent supportive housing units will be supported in the 4 projects underway. Also strategizing with Metro on how to project base Regional Longterm Rent Assistance (RLRA). The County is working with financial partners to get them more comfortable with RLRA and not require huge reserves.*

Andrea asked how the oversight committee could potentially be of assistance with that underwriting issue.

- *They're looking at applying RLRA post-closing which could be a way that lenders and investors are agreeable. Steve hopes that if this plan works in one county it should work in others and commended them on their dedication to permanent supportive housing.*

The next questions were, how are you working to ensure low barrier lease up? How are you monitoring lease up to ensure that households with barriers are served?

- *Although they don't currently have any projects leasing up at the moment they're starting to strategize on it. Tukwila Springs is a full PSH project and the County is contracting with Home Forward on property management and service coordination. They want to use a trauma informed approach to connect homeless households with housing. They're also looking at culturally-specific service providers to work on affirmative marketing.*

Kira asked how they'll make decisions about how to invest the additional air-conditioning funds? Why are some projects able to pay for air-conditioning (A/C) in their additional development costs and others are asking later?

- *All bond projects in their pipeline are already providing energy efficient A/C. They're requiring it in future Requests For Proposals (RFPs). They're supporting hardwired A/C.*

Steve said that they need to diversify their workforce to meet Bond goals and asked what they have planned?

- *Staff have connected with Workforce Clackamas and are working on building out tracking capacity with support from a technical assistance grant from Metro.*

Annual progress report: Washington County

Komi Kalevor, Director of Housing Authority of Washington County, joined the meeting as a presenter along with Shannon Wilson, Housing Development Manager (she/her pronouns). Their responses are italicized below.

Meeting minutes

How are you working to ensure low barrier lease up? How are you monitoring lease up to ensure that households with barriers are served?

- *They're working with service providers for their PSH units and culturally specific providers who they also worked with in initial community engagement to continue those relationships and build upon them. Specifically for Viewfinder, they're working closely with the Housing Authority of Washington County's SHS program. They're learning about the nuances of lease up processes and is a work in progress that they're fully engaged in and are committed to serving clients on low barrier screening.*

Karen Shawcross asked about their Site Acquisition Program (SAP) collaboration?

- *They're working with SAP and looking at the geographic dispersal of Washington County's current ten Bond projects and areas where they would want another project. A site has been identified and they're in very early negotiations.*

Brandon asked if there were any plans in the future to work with tribal entities or government for tribal housing?

- *They would be very interested in tribal housing. With their initial community engagement work they had a hard time connecting with Native American communities who lived in Washington County.*

Kira asked if for any projects in pre-construction, whether the development partners have come back and asked for more funds due to cost increases of materials?

- *They're seeing that generally all projects are coming back with higher asks at the final approval stage because they're getting final construction pricing and it's coming up significantly higher than initial estimates. They aren't currently asking for more bond funds to be used, instead they have a Housing Production Opportunity fund at the County and may be pursuing that for one of the projects.*

Andrea asked how the oversight committee can help the County? Should they advocate to get money out the door?

- *They're not at a point yet where they need help with advocacy but may at some point in the future.*

Karen asked what the status was of Aloha Inn?

- *Renovation work is underway now and is scheduled to be completed by the end of the summer to convert it to PSH. The SHS program has been leading the work to find an operator of the site.*

Steve asked if for the remaining Bond money that they haven't used whether they would be trying to integrate it with the SAP?

- *Their timeline may sync up with the site they're looking at but may not and also would involve negotiating that with SAP.*

Meeting minutes

How will you make decisions about how to invest A/C funds?

- *Four out of ten current pipeline projects were interested in A/C additions and would need additional funding, it mainly depended on where they were within their development projects. After those allocations they would intend on releasing remaining funds with the final NOFA and anticipate A/C being required.*

Annual progress report: Beaverton

Javier Mena, City of Beaverton, joined the meeting as a presenter. He said that although it's been a challenging year, they're hopeful and working to solve for various funding gaps. Scholls Ferry Road has the biggest funding gap and they're working with the State of Oregon and City of Beaverton to bridge those gaps. The final project they have their eye on but are in very early stages of planning for is a senior housing project on a City-owned site that is currently used as a severe weather shelter. It would have the deepest affordability in their Bond portfolio. They're working with the City and County on that because of code changes that would need to occur as well as the need to identify another location for the severe weather shelter.

Bianetth Valdez (she/her/ella), Outreach Coordinator, City of Beaverton also presented. She does community engagement with their housing projects. The City engages with various stakeholders: the public, their advisory committees that include folks with lived experience, trade associations and COBID engagement by letting the community know of projects coming online. She will be following the community members living in the Mary Ann to learn about their experience and take that learning to better future projects.

Their responses to questions are italicized below.

Allison asked how they are working to ensure that their investments serve households experiencing homelessness? What opportunities are you exploring to expand SHS integration/PSH in your portfolio?

- *The future senior housing project will partner with Washington County's SHS program for PSH units. For pre-development projects, Elmonica may add PSH. South Cooper Mountain project is not prepared to have PSH.*

How will you make decisions about how to invest A/C funds? Mary Ann didn't have A/C, for Elmonica could you now get it fully air-conditioned?

- *They're prioritizing putting those funds into Elmonica because they didn't have A/C in their design. The developer has also been having community conversations and is doing research into costs. South Cooper Mountain will have A/C, and for the future Senior Housing project an A/C or cooling system will be required.*

Annual progress report: Hillsboro

Chris Hartye, Senior Project Manager, City of Hillsboro joined the committee as a panelist. The City has 149 units in production. They're working with SAP on a Tanasbourne property and hoping SAP will close in June on it. His responses to committee member questions are italicized below.

How are you working to ensure that your investments serve households experiencing homelessness? What opportunities are you exploring to expand SHS integration/PSH in your portfolio?

Meeting minutes

- *They're making sure their projects are leveraging project-based vouchers (PBVs) through the Housing Authority of Washington County. Other types of housing may be used in the future for PSH and would integrate with SHS.*

How are you working to ensure low barrier lease up? How are you monitoring lease up to ensure that households with barriers are served?

- *Hillsboro is supported by two consultants who have experience with low barrier screening. They're also working to find project sponsors. Nueva Esperanza has affirmative marketing practices particularly for Latinx people and some of their immigration statuses. When community based organizations help provide referrals, they also need orientation so that they're prepared to assist their applicants with applying.*

Kira asked in the chat how Hillsboro going to track and verify the \$10.7M success in equitable contracting dollar allocation?

- *The City purchased a software platform called B2GC Now and they're using it for the first time for tracking.*

Brandon asked in the chat if tenants are able to provide professional letters to assist in the review process within their first or primary language(s)?

- *He will have to look into that and follow-up to confirm.*

How will you make decisions about how to invest A/C funds?

- *Nueva Esperanza has included A/C. Each RFP from Hillsboro going forward will require a cooling plan. Extra funding will be used to support that. They believe it's a life safety issue and not an amenity.*

Local implementation plan discussion

All jurisdictional partner staff who were previously presenting rejoined for a group discussion.

Kira asked if there is an opportunity to support partners with software programs, could Metro or State provide support to create consistency amongst reporting?

- *Emily Lieb said that this is an ongoing challenge. Metro has the Construction To Career Pathways program meant to create inter-jurisdictional alignment on workforce goals. At the moment, Metro is working to get their own software running. At the committee's recommendation Metro offered technical assistance to support partners in acquiring tracking software if they don't already have this capacity. So far, Clackamas County has requested that funding. Metro is also working with local jurisdictions and OHCS to support alignment in tracking to ensure that data can be easily rolled up and to avoid duplicated reporting requests.*

Andrea said that she heard some themes of integration of SHS rental assistance into projects, are they finding solutions to underwriting challenges? Other theme with pipeline projects, which will be reliant on PABs and how does that impact the pipeline? At a state level, there is a need to increase per unit subsidy amounts to spread what PAB and LITHC is available, do members agree?

- *Devin said that Emily has been reaching out and collecting information from them and housing authorities are reaching out to the state.*

Meeting minutes

- *Javier said yes it's a challenge, their modeling was all based on 4% tax credits. Beaverton is working closely with Metro.*
- *Shannon agreed with Devin and Javier.*
- *Chris said an advocacy component may be appropriate.*
- *Emily said Metro will continue to engage with local jurisdictions and OHCS to ensure coordination and alignment.*

Steve posed that since RLRA is available now are there ways to share learned information regionally and maximize this new resource? He also said he is disappointed in the lack of diversification of the workforce and encouraged partners to reach their goals in the upcoming year.

Program updates

- Staff provided an overview of dashboard and expenditure report by Emily Lieb and Rachael Lembo.
 - Emily shared unit production dashboard from website.
- Mitch asked for a detailed update on PSH and allocating the \$23 million dollar for Project Turnkey style investments and Emily responded.
 - Emily said Metro is working with the Counties to understand near term opportunities to advance investments that support rapid PSH creation beyond the initial Bond goals. The goal is to first understand near term opportunities and then structure a process that can best support the counties in pursuing them.
 - Mitch expressed concern about need to deploy funds quickly, to try to have units in service by next winter.
- Mara asked whether, given challenges with PABs, Metro would advocate for or a shift away from tax credit model?
 - Emily said they're working with partners to develop more specific recommendations and will continue to update the committee as the conversation moves forward.
 - Andrea said it's important to coordinate amongst state and local partners and it is incumbent on all of us to advocate for better coordination. She asked how we mix different funding sources? She said we've become reliant on PABs and LIHTC, why not look at allowing Bond and LIFT funds to be used simultaneously?

Next steps

The next oversight committee meeting is March 30, 9:00 AM-12:00 PM

Allison adjourned the meeting at 12:00 PM.

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

Housing Bond Progress Report for Portland | 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.*
In early 2021, PHB selected four projects for contingent funding awards from the 2020 RFQ for Supportive Housing. Final awards were contingent on commitments of project financing by 12/31/21 and Metro Concept Endorsement. One project, the Hattie Redmond Apartments, received Final Approval from Metro in April 2021 and started construction of 60 Permanent Supportive Housing (PSH) units in October 2021.

Of the three other projects to receive a contingent funding award from the 2020 RFQ for Supportive Housing, two applied for additional Metro Bond funds through PHB’s Spring 2021 Metro Bond Opportunity Solicitation (M-BOS). Released in April 2021, the M-BOS included \$75 million in Metro Bonds, Project-Based rental assistance vouchers from Home Forward and Supportive Housing services funds from the Supportive Housing Services Measure from the Joint Office of Homeless Services (JOHS). The M-BOS prioritized proposals for housing focused on PSH and families and included one PHB-owned property and one Metro-owned property.

Twenty-three proposals responded to the M-BOS for the potential of 16 new projects for Metro Bond funding. These 16 projects requested \$189.5 million and represented 1,464 units of new affordable housing. As described in the LIS, PHB convened two committees to evaluate proposals. A Technical Review and Community Review committee evaluated how each proposal met the requirements and qualifications of the M-BOS and made a ranked recommendation for projects to receive an award to the PHB Director and Commissioner-in-Charge. Seven selected projects were announced in September 2021. All seven projects, totaling \$90.7 million and 687 units of affordable housing, received Concept Endorsement from Metro in November 2021.

In addition, two more Phase II projects have been identified for Metro Bond funding that align with Metro’s Regional Bond goals and Portland’s LIS. These additional projects will be submitted to Metro for Concept Endorsement and Final Approval by mid-2022. Taken together, these nine new projects combined with the four projects already approved by Metro equal 1,223 new units of affordable housing resulting in Portland’s achievement of 83% of its total unit production goal.

- 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*

As detailed in the City of Portland’s Metro Bond Local Implementation Strategy (LIS), in order to optimize the use of Metro bonds, PHB leveraged:

- **Capital from PHB and others:** All PHB Metro funded projects, except one, use Low Income Housing Tax Credit (LIHTC) and most use commercial debt. PHB was also able to leverage some of its Housing and Urban Development HOME, Construction Excise Tax (CET) and Tax Increment Financing (TIF) funds in a few projects. PHB has combined \$26.7M in its capital resources to pair with the Metro bond funds to deliver on the commitments made in the Metro bond.

In addition, several selected projects accessed Oregon Housing and Community Services (OHCS) support from Mental Health and Addiction Services funds, Local Innovation and Fast Track (LIFT) program, Permanent Supportive Housing (PSH) capital, Oregon Affordable Housing Tax Credits (OAHTC) as well as Metro Transit Oriented Development (TOD) and other grant funds. And two other projects were able to leverage Veterans Administration Supportive Housing (VASH) vouchers and three projects were able to access OHCS rental support and Oregon Health Administration (OHA) services funding for their PSH residents.

- **Attractive low-cost/no-cost sites:** The 2021 M-BOS offered two attractive sites, 74th & Glisan owned by Metro, and 5020 N Interstate, owned by PHB for development. Through these sites, PHB and Metro were able to shape the type of development and the affordability mix targeting specific locales where affordable housing was needed. Publicly owned and/or controlled sites are expected to continue in future solicitations to meet City-wide goals. In addition, site leverage proved to be innovative as developers worked to use sites from Trimet, PCC, churches and mission-driven owners, and their own existing sites for redevelopment.
- **Existing predevelopment pipeline:** Four projects, that had been awarded funding through earlier solicitations but had funding gaps, received additional Metro bonds in order to move forward. Through this process, PHB was able to quickly deliver units that meet the Metro Bond targets and achieve PSH units with deep affordability. These four projects will use 4.3% of PHB’s total Metro funds (or \$9.2 million) significantly less than the maximum 10% indicated in the LIS. In total, these four projects will produce 329 units, of which 134 are family-sized, 55 are 30% AMI, and 95 are PSH.

Similar to the Portland Housing Bond implementation, PHB sets maximum subsidy per unit in solicitations. As indicated in LIS, the Technical and Financial Feasibility Committee reviews all proposals including the pro forma to determine the

reasonableness of each proposal and the requested amount of PHB Metro bond subsidy. This information is shared with the Community Review Committee and the PHB Director. Once a project is awarded, the Metro bond subsidy may not be revised without meeting specific criteria and having provided detailed supplemental materials. PHB staff works with the developer(s) on all financing structure and on construction contracts, including review of add-backs and contingencies. Change in LIHTC generation due to the December 2020 fixing of the applicable rate to 4% for LIHTC has helped some projects offset the rapid increases in commodity prices during the last year, as a result, there has been no “excess” funds in any of PHB Metro awarded.

- 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.*

As part of the City of Portland’s Metro Bond Local Implementation Plan (LIP), the City has the goal of creating 300 new Supportive Housing (SH) units. This goal advances the City’s and Multnomah County’s shared goal of creating 2,000 new SH units from the adoption of resolutions in October 2017. As of September 30, 2021, there are 1,571 new units in Multnomah County that have opened or are in the development pipeline. Of this total, 472 units are open and 1,099 are in the pipeline. As a community, we are at 78% of our original goal.

Achieving and sustaining the Metro Bond SH units is dependent on securing non-Bond resources to pay for services and rent for households living in the units. PHB is closely coordinating with jurisdictional partners Multnomah County Joint Office of Homeless Services (JOHS) and Home Forward to effectively align and leverage SHS funds to create new SH units through the Housing Bond and sustain ongoing operation of those units. SHS funds are being invested to provide supportive services and rent assistance to fill identified operating and service funding gaps as modeled by Metro, PHB, JOHS and Home Forward.

At the close of 2021, we have made significant progress in creating new SH units. **PHB has awarded Metro Bond funds to seven projects that will deliver 262 new SH units for families and individuals experiencing chronic homelessness**, placing us at 87% of the 300 SH goal. These projects were selected through the following processes: Phase 2 pipeline projects (existing projects with City funds and small funding gaps), the Metro Bond Request for Qualification for Supportive Housing (Fall 2020) and the Metro Bond Opportunity Solicitation (Spring 2021). These projects have been approved by Metro’s concept endorsement process as outlined in the City and Metro’s IGA.

Of the 262 SH units that will be produced by the Metro Bond, **121 units will receive JOHS SHS Measure funding for services, at the budget of \$10,000 per unit per annum, for a total projected allocation of \$1,210,000 annually (with 3% escalation.)** For the remaining SH units not receiving JOHS SHS funds, Metro Bond funds are leveraging several other services and rent subsidy resources for SH, including OHCS/OHA PSH funds and Project Based Vouchers (PBVs) from Home Forward.

The new SH units are planned to come on-line within the next couple of years and will create needed supportive housing opportunities to respond to the urgent housing shortage for the following communities: homeless Veterans, BIPOC communities, families, seniors and persons living with severe mental illness and health conditions.

- 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.)*

PHB hopes to continue releasing solicitations for Metro Bond funds annually until all the production goals have been achieved. At the end of 2021, progress has been successful, as illustrated in the table below.

	Total Units	30% AMI Units	PSH Units	Family Sized Units
Metro Awards	1,105	435	237	499
Goals	1,475	605	300	737
Remaining to Achieve	370	170	63	238

After the two additional Phase II projects have received Metro Concept Endorsement and Final Approval (anticipated by mid-2022), PHB’s total progress will equal 1,223 new units of affordable housing representing 83% of its total unit production goal, 78% of its goal for 30% AMI units, 87% of its PSH goal and 79% of its goal for family-sized units. Meeting the remaining production goals will require PHB to prioritize 30% AMI and family-sized units in any future funding solicitations. Homeownership may not be prioritized but will remain an eligible option for project proposals. The timeline for the next

funding solicitation is likely to occur in the summer or fall of 2022 as alignment with OHCS funding also remains a priority for PHB.

Figure 1. Production progress and resources committed

Project	Total Project Cost	Metro Bond Funds (w/o PDF)	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	Concept, final approval, construction, complete	Month/Year	Month/year
Hattie Redmond	\$21,515,370	\$4,500,000	60	60	0	60	No	No	In construction	Oct-2021	Nov-2022
Dekum Court	\$78,919,528	\$21,034,083	147	61	75	0	TBD	TBD	Concept	Mar-2022	Jan-2025
Findley Commons	\$6,967,137	\$1,901,312	35	0	0	35	No	No	Complete	Oct-2020	Dec-2021
Waterleaf	\$77,957,828	\$1,700,000	176	17	48	20	No	No	In construction	Dec-2020	Jul-2022
74 th and Glisan	\$56,515,117	\$8,022,500	137	56	63	41	No	Yes	Concept	Dec-2022	June-2024
5020 N Interstate	\$30,176,395	\$9,152,000	64	18	48	0	No	No	Concept	Jun-2022	Jul-2023
Albina One	\$49,116,686	\$13,422,000	94	32	54	0	No	No	Concept	Mar-2023	Mar2025
Meridian Gardens	\$26,069,918	\$12,155,000	85	70	0	65	No	Yes	Concept	Jan-2023	Feb-2024
Hollywood Hub	\$98,790,115	\$28,428,483	199	69	129	0	No	No	Concept	June 2023	Jul 2025
PCC Killingsworth	\$38,039,446	\$2,481,000	84	28	60	0	No	No	Concept	Jun-2023	Aug-2024
Tistilal Village	\$28,406,356	\$3,432,000	24	24	22	16	No	No	Concept	Sep-2022	Dec-2023
Total committed or underway		\$106,248,378	1105	435	499	237					
LIS commitment		\$211,056,579	1475	605	737	300					
% of commitment complete		50.3%	74.9%	72%	68%	79%					
Remaining for LIS		\$104,808,201	370	170	238	63					

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*

**Except where updated below, project images have been submitted to Metro previously – see [Concept Endorsement documents](#) and [Metro-drafted project profiles](#).*

1. Hattie Redmond Apartments

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

Urban League, an organization that serves and advocates for the African American community in Portland, will rely on its success with their Project HAVEN permanent supportive housing program and will integrate trauma-informed, culturally specific, and client-centered input into the building design, financing and programming. The on-site services team will include a resident services coordinator, case managers and peer support specialists. Project amenities include common rooms, a community kitchen facility, outdoor areas and other amenities that bring residents together.

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

2. **Dekum Court**

The Dekum Court complex currently features 40 affordable apartments in NE Portland. Home Forward will redevelop the site, adding 147 newly affordable units for communities of color and low-income families. Project amenities include a Head Start, playground, laundry facilities and community rooms. Partners and development team members include Faubion Elementary School, LEVER Architects, and Walsh Construction.

The project leverages Metro bonds 3 times with additional funding from Oregon Housing and Community Services (LIHTC), other tax-exempt bonds, Home Forward equity and private funding.

3. **Findley Commons**

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

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



4. **Waterleaf (fka, Riverplace Parcel 3, Phase 2)**

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

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

5. **74th & Glisan**

74th and Glisan will be co-developed and co-owned by Related NW, Catholic Charities and Immigrant and Refugee Community Organization (IRCO). Other development team members include Holst Architecture, LMC Construction, ALMAR Contracting, Quantum Residential, and We All Rise. The first building will have 41 units of permanent supportive housing (PSH) prioritizing Black, Indigenous and other people of color (BIPOC), seniors and survivors of domestic violence/sexual assault coming out of homelessness. The second building will provide 96 units of family housing with a mix of unit sizes, prioritizing BIPOC, immigrant and refugee households and intergenerational families.

On-site culturally specific services will be provided by IRCO and Catholic Charities. The project team is partnering with Mercy Corps NW to promote small business classes, offer two retail incubator spaces and a social impact café with a culinary and barista training program in the ground-floor commercial space. Amenities include a community room and kitchen, laundry room, multicultural reading room and book exchange, playground, picnic area, community garden, bike and car parking. The project is also proud to feature the first IRCO led multicultural preschool in Multnomah County.

The project leverages Metro bonds nearly 3 times with additional funding from Oregon Housing and Community Services (LIHTC), permanent debt, SDC waivers and deferred developer fees.

6. 5020 N. Interstate

5020 N. Interstate will be co-developed and co-owned by Community Development Partners (CDP) and Self Enhancement Inc (SEI). Other development team members include Carleton Hart Architecture, LMC Construction, ALMAR Contracting and Guardian Management and DRCOMM real estate brokerage. The project will serve families and give priority to displaced or longtime residents of north/northeast Portland, especially African American families by implementing the City of Portland's N/NE Preference Policy. Amenities include a community garden, outdoor play area and courtyard, bike storage, onsite parking and services. A neighborhood-serving commercial space will be located on the ground floor.

The project leverages Metro bonds 3.3 times with additional funding from Oregon Housing and Community Services (LIHTC), permanent debt, SDC waivers and deferred developer fees.

7. Albina One

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

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

8. **Meridian Gardens**

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

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

9. **hollywood HUB**

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

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

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

10. **PCC Killingsworth**

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

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

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

11. Tistilal Village

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

Interiors will emphasize trauma informed design approaches including ample sound buffering, clear and simple circulation patterns, plenty of meeting and community spaces, focus on safety at entryways, soothing color palette and direct lines of sight. Native American art will be prominently featured. Outdoor spaces include a play area, seating, community gardens and a plaza. Other amenities include easy bus access, grocery stores, health clinics, parks and a community center within walking distance.

Metro bond funds are leveraged 8 times with additional funding from Oregon Housing and Community Services (LIHTC and OAHTC), grants, SDC waivers and deferred developer fees.

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*

Only one project, Findley Commons, has completed construction in 2021. This project underachieved in meeting PHB's equitable contracting goals for hard costs by 5% and overachieved by 37% for soft costs. Some of these outcomes can be attributed to the scale of the project and the ability to attract bids, and an uncertified, but veteran owned, General Contractor. However, success is not always about meeting stated benchmark goals. Success, in this case, is about growing the capacity of new partners and expanding the pool of qualified contractors. Home First Development hired a project manager experienced in helping contractors become COBID certified who emphasized DMWESB participation and outreach resulting in a 57% professional services participation rate.

The other projects with construction underway are on track to meet or exceed PHB's equity in contracting goals despite COVID-related challenges that impacted outreach and bidding activities. These projects are also implementing partnerships with culturally specific and neighborhood-based organizations to increase the hiring of BIPOC and women in apprentice and journey-level workforce diversity programs. The goals and progress noted in Figure 4 below solely reflects percent of apprentice hours and participation by minorities and women. PHB also has workforce diversity goals for journey level hours at 22% of total hours worked by minorities and 6% of total hours worked by women.

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)	
Hattie Redmond (Baldwin)	Home Forward/Bremik	30%	20%	Preliminary progress at 38% DMWESB for hard costs and 29% DMWESB for soft costs.
Dekum Court	Home Forward/Walsh	28%	20%	Plan to increase hard cost goal from 28% to 30%
Findley Commons	Home First/Beaudin	24%	20%	Construction completion at 17.73% DMWESB for hard costs, 57% DMWESB soft costs
Waterleaf (Riverplace 2)	BRIDGE Housing/Walsh	30%	n/a	Project 50% complete. Currently at 21.85% DMWESB for hard costs. PHB was not tracking soft costs when project began 5 years ago.
74 th and Glisan	Related NW/LMC	30%	20%	
5020 N Interstate	Community Development Partners/LMC	30%	20%	
Albina One	Albina Vision Trust/COLAS	30%	20%	Developer aims to exceed PHB goals.
Meridian Gardens	Central City Concern/Walsh	30%	20%	
Hollywood Hub	BRIDGE Housing/Walsh	30%	20%	
PCC Killingsworth	Home Forward/Walsh	30%	20%	
Tistilal Village	HDC/COLAS	30%	20%	

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			
Hattie Redmond	Home Forward/Bremik	18%	9%	20%	Y	n/a	GC is working with Urban League on apprentice participation. Not many hours yet as project is not fully underway. Overall – 10.93%; Journey POC – 100%; Apprentice Women – 100%

Dekum Court	Home Forward/Walsh	20%	9%	20%	Y	Davis Bacon	goals for journey level hours same as apprentice hours
Findley Commons	Home First/Beaudin	22%	9%	20%	Y	Davis Bacon	Apprentice overall - 19.5%, Journey POC – 50.36% Journey Women- 0.57% Apprentice POC – 9.34%
Waterleaf (Riverplace 2)	BRIDGE Housing/Walsh	22%	9%	20%	Y	Davis Bacon/BOLI	Apprentice overall - 20.88% Journey POC – 48.97% Journey Women – 2.21% Apprentice POC – 25.95% Apprentice Women – 26.5%
74 th and Glisan	Related NW/LMC	22%	9%	20%		BOLI part / Davis Bacon	
5020 N Interstate	Community Development Partners/LMC	22%	9%	20%		BOLI	
Albina One	Albina Vision Trust/COLAS	22%	9%	20%		Davis Bacon/BOLI	
Meridian Gardens	Central City Concern/Walsh	22%	9%	20%		Davis Bacon	
Hollywood Hub	BRIDGE Housing/Walsh	22%	9%	20%		BOLI	
PCC Killingsworth	Home Forward/Walsh	22%	9%	20%		BOLI	
Tistilal Village	HDC/COLAS	22%	9%	20%		n/a	

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)*

Following the location priorities described in the Metro Bond Workplan and PHB’s LIS, project location criteria include projects located in areas of high opportunity and/or high risk of displacement, proximity to transit, services and resources, as well as geographic diversity to balance Metro Bond investments throughout each “region” of Portland. Project selection through past solicitations has resulted in projects throughout the city except in a Southwest Portland neighborhood (excluding the Central City area of downtown Portland). A future solicitation may include a property in Southwest Portland purchased by Metro in 2021.

Project sponsors select development locations based on both market opportunities and criteria that aligns with the sponsor organization’s mission or an identified community need. For example, the location for the Albina One project was selected for its strong ties to Black history and culture in Portland. The project is in lower Albina, the historic neighborhood for Black Portlanders that was home to the highest concentration of African American residents anywhere in the city or state of Oregon. It is adjacent to the Paramount Apartments, which was a safe hotel and apartment complex for Black people before and during segregation. The project will be in the original jazz district of Portland, wherein many Black creatives showcased their talent in what used to be a vibrant cultural center. Finally, it was the neighborhood that Portland’s early Black residents lived in for an easy, short commute to work at the nearby Amtrak train station, Kaiser shipyards or the garment district (which is now the Pearl). The neighborhood is steeped in Black history and culture.

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

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

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

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

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

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

An on-going requirement of PHB's funding solicitations and project selection criteria, all projects must describe and provide evidence of partnerships and/or internal programs to provide services that are culturally specific and responsive for the project's target populations. Most projects' programming and services target BIPOC communities and/or individuals experiencing homelessness or at risk of homelessness. Project teams include either external, culturally specific partners or plans to provide in-house culturally specific programs to residents onsite. For example, Central City Concern has several culturally specific and responsive in-house programs, such as Imani, Puentes and Flip the Script, that will be offered to residents at Meridian Gardens.

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

Not available for this reporting period.

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
Hattie Redmond Apts.	BIPOC, homeless singles/couples	Urban League of Portland, N/NE Preference Policy	Urban League of Portland
Dekum Court	BIPOC families		
Findley Commons	Veterans, homeless singles/couples	Do Good Multnomah, Dept. of Veterans Affairs, St. Mark's Lutheran Church	Do Good Multnomah, National Association of Black Veterans
Waterleaf	BIPOC, families, veterans, homeless	Dept. of Veterans Affairs, Latino Network, El Programa Hispano Catolico, Community Vision, Easterseals Oregon, Metropolitan Family Service	Impact NW, Latino Network, El Programa Hispano Católico, SEI, IRCO, NAYA, Iron Tribe, Bridges to Change, Transition Projects
74 th & Glisan	BIPOC, seniors, homeless, survivors of domestic violence or sexual assault, immigrant/refugee and intergenerational families	Catholic Charities and IRCO programs, Intercultural Counseling Center, Immigration Legal Services, Refugee and Migration Services, Housing Transitions Program	Catholic Charities and IRCO internal programs. Other partnerships TBD.
5020 N Interstate	African American families	Self Enhancement, Inc. programs and partnerships; N/NE Preference Policy	Self Enhancement, Inc. programs and partnerships
Albina One	African American and other BIPOC families, single fathers	POIC+RAHS, other local agencies; N/NE Preference Policy	POIC+RAHS, NxNW Health, The OHSU Avel Gordly Center for Healing, Prism Health, Black Parent Initiative
Meridian Gardens	BIPOC, homeless adults/couples in treatment or recovery program	Website, email and fliers. Outreach through partner agencies and Central City Concern's Housing and Employment Advisory Council, and Imani, Puentes, Substance Use Disorder Services (SUDS), and Flip the Script Programs.	Central City Imani, Puentes, SUDS, and Flip the Script Programs; LifeWorks, NARA, Northwest Pilot Project, Portland Rescue Mission, Salvation Army Adult Rehabilitation Center, Transition Projects, Inc.,
hollywoodHUB	BIPOC, immigrant/refugee families	Culturally specific media, Hacienda, IRCO, POIC, APANO, NAACP, Muslim Educational Trust, Self Enhancement, Inc., NW Pilot Project, Urban League, Hispanic Metropolitan Chamber, Asian Health & Service Center	Northeast Community Center, POIC, IRCO, Urban Gleaners
PCC Killingsworth	BIPOC families, youth aging out of foster care	NAYA, Living Cully, PCC Workforce Development Center	NAYA programs and services

Tistilal Village	BIPOC, Native American families, homeless	utilize targeted email distribution lists/channels, calling clients/potential residents, reach out to tribal partners and other BIPOC-led organizations and existing tenants	NAYA, NARA programs and services
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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.

Community engagement activities during 2021 included informational mailings to neighbors, property signage, a presentation at a neighborhood association meeting and focus groups with existing program participants and residents. The Hattie Redmond, for example, has been conducting focus groups with Urban League’s Project HAVEN residents who are primarily BIPOC formerly homeless individuals. Home Forward also contracted with Oregon Black Pioneers to lead a naming workgroup with Urban League staff and program participants that led to the selection of Hattie Redmond as the project’s namesake. By comparison, Dekum Court’s engagement focused on meetings with its Community Advisory Committee. This committee includes current residents, community partners and neighbors. Demographic information has not been shared for either project.

To date, feedback from engagement activities has informed project designs and implementation. Design changes for Hattie Redmond include utilizing a gabled roof to reflect the neighborhood’s residential character, increasing the building’s rear setbacks beyond the zoning code requirements to better separate the building from its neighbors, installing handrails, shower stalls and grab bars to increase accessibility for elderly and disabled residents, and incorporating an outdoor patio and roof deck to increase residents’ access to nature and opportunities for gathering together. In addition, Urban League staff and current residents expressed a desire for art that reflects them and their life experiences. Home Forward has hired an art consultant who is a person of color to facilitate regular art committee meetings. Feedback gathered for Dekum Court resulted in adding in-unit washer and dryer hookups in every apartment in addition to a common laundry room to better serve parents and persons with disabilities. Other changes to the project include a covered sport court adjacent to the community building and redesigned drive aisles and parking lot locations to promote better safety based on resident feedback.

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	6	4	0	2
List of organizational partners		Hacienda, NAYA, Project HAVEN, Oregon Black Pioneers		Faubian School, Kenton Neighborhood Association

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
Dekum Community	21	N								

Advisory Committee										
Kenton Neighborhood Association meeting	Not reported	N								
Project HAVEN focus groups	Not reported	N								
Hattie Redmond Naming workgroup	5	Y-limited info	Unknown	100%	100%					80%
Hattie Redmond groundbreaking	75	N								

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?

In alignment with Metro’s policy on cooling strategies, PHB issued a new air conditioning requirement, effective August 13, 2021, in response to the extreme heat waves of the summer. The requirement asked affordable housing developers to propose an in-unit air conditioning strategy that best balanced the needs of their project and populations while ensuring the project’s efficient use of public resources. Acceptable cooling approaches include central air conditioning, packaged terminal air conditioners (PTACs), ducted or ductless condenser or heat pump units, window A/C units, portable A/C units, hybrid, geothermal, or other emerging technologies.

All of the 2021 MBOS awardees were expected to comply with the new cooling policies and requirements, and projects already under construction were encouraged to collaborate with PHB to identify opportunities for in-unit air conditioning cooling strategies within the existing financial parameters of the project. Projects that did not already include designs for in-unit air conditioning units (e.g. only A/C in corridors or window ports) submitted amended cooling proposals and cost estimates to adjust their designs, and

Metro recently announced an allocation of funds to ensure all MBOS projects can comply with PHB's cooling requirement. The most common approaches are two-fold: 1) single zone mini splits, or 2) dual port portable window unit. The most preferred approach from an energy, cost and environmental impact is the mini split; however, in cases where buildings are already designed and under construction, portable/window units may be the only viable cooling solution.

The most significant challenge for the projects is cost. Current budget estimates range from \$1,500 (dual port portable window unit) to \$10,000 (single-zone mini split) per unit. A related challenge is how to address cooling needs in rehab projects, especially for historic buildings with high-cost scopes of work (e.g. seismic upgrades) and/or where centralized cooling strategies may compromise the building envelope. PHB is currently working to refine our cooling requirements for rehab buildings.

Housing Bond Progress Report for East Multnomah County (Home Forward) | 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.*
 - *It's important to remember that Home Forward is a little different from the other Local Implementation Partners (LIP). Home Forward is an owner and developer of affordable housing and a LIP that received a small allocation of Metro bond funds in a targeted jurisdiction of East County (areas outside of the cities of Portland and Gresham). Home Forward, with Metro's support, determined that it would develop the units targeted to East County directly, rather than allocating the funding to another developer. Because of that our progress toward implementing the LIS is project specific.*
 - *MWA Architects were selected as the design firm and Bremik Construction was selected as the CMGC, using a competitive process in 2021.*
 - *The selection committees for the architect and the contractor included Home Forward staff, a board member, and staff from one of our community partners, El Programa Hispano.*
 - *The project recently completed the schematic design phase and will be priced by Bremik in February. We anticipate cost overruns and a value engineering process, which is typical.*
 - *Our next big step will be to submit a parking variance request to the city of Troutdale, which will be a lengthy and complicated process. Troutdale requires 2.3 parking spaces per unit, no matter the size of the unit (216 spaces for 94 units). To fully meet Troutdale's parking requirements, we would have to reduce the number of units on the 3.5 acre site.*
- 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*

- Home Forward always works to balance an efficient and effective use of public funds while developing projects that are energy efficient, financially sustainable from an operations and maintenance perspective, considers the pay of the contractors who work on the site and creates a good place for people to live for generations.
 - Each project and site are different. This project has a number of cost drivers that increase costs such as:
 - The site is not in a Difficult to Develop Area, so it will not receive a 30% tax credit bonus.
 - The project is located in a jurisdiction that does not provide any System Development Charge waivers or any other affordable housing funding or tools to reduce costs.
 - The site is located on a sloped parcel of land, with public improvements required on two or three sides.
 - The site has very high parking requirements which is more costly to build than landscaped areas.
 - As with all Metro bond fund projects that meet Metro goals, larger units are more expensive to build and units with rents at 30% AMI cannot leverage much if any debt.
- 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.*
- Home Forward will provide 25 project-based rental assistance vouchers through a pool of SHS funds it has to allocate. These units will serve people at risk of homelessness.
 - If additional funding for supportive services is needed, beyond what is already planned for resident services, we will work with the Joint Office of Homeless Services to request an allocation.
- 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.)*
- Currently 94 units are included in the conceptual design. This is still a fluid number due to negotiations with the City of Troutdale regarding requirements of their parking code. The anticipated construction start is March 2023 with completion by September 2024.

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			
Troutdale Project (East County)	\$42,051,055	\$15,213,585**	94	39	47			Concept – under review	Mar-2023	Sep-2024	
Total committed or underway		\$13,449,238	94	39	47						
LIS commitment		See note below	111	46	55						
% of commitment complete		N/A	84.6%	84.7%	85.4%						
Remaining for LIS		N/A	17	7	8						

*Home Forward will also receive direct funding allocation from Metro for the Dekum Court project, which was a Phase I project in the City of Portland. Funding and unit production for Dekum Court are reflected in the City of Portland’s progress report.

** This includes Metro’s land acquisition funding allocated to East County. Home Forward was able to negotiate that a County-owned property be transferred to Home Forward at no cost, as long as it is used as affordable housing.

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

- b. *Project team and partnerships*
 - Home Forward - developer, owner
 - MWA Architects
 - Bremik Construction
 - Resident services partners not yet confirmed

- c. *Funding sources leveraged*
 - 4% tax credits
 - Permanent loan with Oregon Affordable Housing Tax Credits
 - Donated land from Multnomah County
 - Deferred developer fee
 - Home Forward Reserves

- d. *Noteworthy features or highlights (e.g., community space, free wi-fi, accessibility features, childcare, climate resilience and sustainability)*
- A sea of parking.
 - Buildings arranged in L-shapes with parking nearby to address Community Advisory Committee input regarding extreme weather and east winds.
 - Community room to accommodate classes and resident meetings that will include free-wi-fi access.
 - Current design utilizes mini-split heat pumps for heating and cooling in all units. Mini-split heat pumps are extremely energy efficient. In community spaces a combination of single-zone and multi-zone split system heat pumps will provide heating and cooling.
 - Heat recovery ventilators will supply fresh air and continuous ventilation to all units.
 - Imagine Energy has been hired to look at including a photovoltaic system (solar panels) to the project to supply solar powered electrical energy.
 - Washers and dryers in all units
 - Five Type A – fully accessible units and six Type B units.
- e. *Anything else worth highlighting*
- A transportation and parking study is underway in an effort to negotiate lower parking ratios for an affordable housing development. The Troutdale code requires 2.3 parking spaces per unit. The current conceptual site plan allows for a 1.4: 1 ratio and will require a variance from the Planning Commission. Staff and the Mayor have expressed their concern that the Commission is unlikely to provide a waiver from the existing code. We are working with the city to come up with data that supports the proposed parking ratio and other nearby parking lots that could be used by our future residents.

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*

- Currently in the design phase of the project the MWA team has exceed the 28% COBID firm goal and have contracted with six COBID firms for a 30% participation rate. Bremik Construction has well established ties to diverse COBID subcontractors in the Metro area and is dedicated to meet or exceed the equity contracting goals of 30% participation.
- b. *Progress toward advancing the workforce diversity goals and strategies in your LIS*
- As we move from the design phase into the contracting phase, Bremik Construction is committed to a robust outreach in order to create opportunities to increase workforce diversity. They have provided internships to low income high school students, participated in Women in Construction Career Fairs, and are currently working with Urban League to hire from their trade school graduates.
- c. *If applicable, work complete or underway to expand local capacity to monitor and report on contracting and workforce outcomes*
- Home Forward coordinated with community partners and pre-apprenticeship programs to advertise and conduct two virtual “pre-apprenticeship fairs” (Spring 2021 and one on-site fair (Fall 2021). Although participation at these events was low, Home Forward will continue to reach out to partners to support their work to recruit new women and people from marginalized communities into the construction trades.

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)	
Troutdale Project (East County)	Home Forward/Bremik	30%	28%	

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

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

Project name	Developer, General contractor	Workforce goals % of total labor hours* worked by...			Workforce tracking?	Prevailing wage	Notes and preliminary progress
		POC	Women	Apprentices			
Troutdale Project (East County)	Home Forward/Bremik	28%	9%	20%	Y	Residential 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)*
 - The location is a short walking distance from Troutdale Elementary School. To ensure early and consistent communication, the Principal is participating in the project's Community Advisory Committee (CAC).
 - Bus access will be key to the success of the project. Metro's TOD staff have also been invited to participate in the CAC.
- b. *How projects are incorporating affirmative marketing strategies, partnerships for referral, and low-barrier lease-up*
 - Not yet applicable
- c. *Specific strategies for leasing permanent supportive housing units (e.g. coordinated referrals)*
 - Not applicable (no PSH units planned)
- d. *Plans and partnerships to align culturally specific/responsive programming and services to meet the needs of tenants.*
 - Home Forward has a long standing relationship with El Programa Hispano, one of the few culturally appropriate service providers that works in Troutdale.
 - We have started conversations with them about housing and service needs for future residents.
 - El Programa Hispano has helped us to design a project that serves their clients better by:
 - Participating in our architect and contractor selection process
 - Hosted a group of people with lived experience to participate in early interviews about housing and service needs and desires
 - Serving on our Community Advisory Committee
 - The project is planned for occupancy in Aug. 2024. As we get closer we will work with service providers to create more concrete plans and partnerships to serve the residents of the Troutdale project.
- e. *If you have projects that are beginning to lease up, please feel free to share any preliminary data on demographics.*
 - Not yet applicable

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
Troutdale development	Low income residents, including seniors, people experiencing disabilities, and families with children	Not yet applicable	Planning will begin in 2023

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.
 - Three focus groups with low income residents of East County (recruited by culturally specific partners) were held in August 2021 to inform the beginning of the work by the project Design Team.
 - A Community Advisory Committee has been established and two Zoom meetings were held in 2021 with additional meetings planned in 2022.

- 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.
 - Focus Group composition:
 - Focus groups were 100% recruited from three priority population groups: Latinx; African American and Immigrants from Eastern Europe. Although the number of people in each household was not collected to compare to income to make a determination of “low income household”, all have had experience living in affordable housing or homelessness.
 - CAC composition: Home Forward has not yet sent a SurveyMonkey to CAC participants to ask for their self-identification. We anticipate gathering that information with a survey after CAC meeting #3 in March 2022. There are three primary stakeholder groups participating:
 - Five people with a lived experience of housing instability in East County (three of whom are people of color)
 - Four neighbors and nearby business owners

- Four community service providers and financing partners.
 - We have also had additional neighbors and Troutdale City Council members attend as guests.
- c. *Summarize major themes of feedback (WHAT YOU HEARD, e.g. “participants want more large units or garden space,” etc.)*
- Location of buildings on the site needs to better consider the east winds, snow, and ice common in Troutdale.
 - Parking access needs to be closer to front doors both for weather concerns and juggling groceries and children from the vehicle to inside.
 - Traffic and parking impacts on the surrounding neighborhood need to be considered.
 - ADA units need to be located throughout the site and have easy access to the property management and community room
 - Fourth Street (adjacent neighborhood street) needs clear access for public works vehicles (especially snowplows in the winter)
 - Community gardens are a plus in the landscaping plan.
 - Multimodal connections from the site to the greater neighborhood is important.
 - Opportunities for older youth to hang out need consideration.
- 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)*
- Buildings were redesigned to form an L-shape to address the severe wind and winter conditions
 - Parking lots were broken into three distinct areas for more direct access to front doors.
 - A transportation and parking study is underway.
 - Additional issues will be addressed as design moves into the next phase (balanced with available funding and code requirements).
- 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		3		
List of organizational partners		<ul style="list-style-type: none"> ● El Programa Hispano; ● Self Enhancement Inc; ● IRCO staff member 		

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
Hispanic Focus group	9	Y	5	100%		20%	60%	Did not ask	Not applicable	60%
African American Focus group	1	Y	1	100%	100%	0	0	Did not ask	Not applicable	0
Eastern European Immigrant Focus group	10	Y	7	All identified as white with one also identifying as Asian	See note	14%	Only 28% reported speaking English at home; 100% reported speaking Russian	Recruited due to immigrant status	Not applicable	0

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?

- **Cooling systems:** Current design utilizes mini-split heat pumps for heating and cooling in all units. Mini-split heat pumps are extremely energy efficient. In community spaces a combination of single-zone and multi-zone split system heat pumps will provide heating and cooling.
- **Regional coordination:** It’s important to ensure that our tenants live in a healthy living environment with access to cooling – either in their unit or in common area spaces. It’s also important to consider the impacts of new policies such as cooling requirements have on other funding requirements and building codes.

- How does cooling intersect with energy, ventilation, and sustainability requirements? For example, at one project it was necessary to remove roof solar cells to make room for 206 mini-split A/C condensers on the roof. Funding requirements are often in conflict with each other.
- How will requirements be prioritized among funders? Typically, residents pay for electricity. How will the addition of A/C effect their electric bills? Will there be additional emergency utility funds to off-set the increase in utility costs associated with A/C? How will A/C, especially mobile A/C units, impact operating expenses, especially maintenance staff expense and storage requirements?

Housing Bond Progress Report for Metro Site Acquisition Program | 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.)*

Metro's Site Acquisition Program (SAP) partnered with two jurisdictional partners to select development partners for Metro-owned properties in 2021.

Beaverton and Metro issued a RFQ for development of the Elmonica Station site at 170th and Baseline on November 2nd, 2020. Eight development teams submitted proposals by the due date of January 15, 2021. Beaverton and Metro staff provided feedback to a five-member community selection committee (CSC) made up of representatives from Metro's Transit-Oriented Development Steering Committee, Beaverton's Housing Technical Advisory group, and housing service providers. The CSC met twice and ultimately recommended that Beaverton and Metro work with REACH CDC as the preferred housing developer. The CSC believed that REACH

best met the LIS goals described in the RFQ related to unit targets and unit mix, COBID participation, and community engagement. REACH's proposal created the most units (81) and had the most aggressive COBID hard and soft cost goal that also included a BIPOC general contractor. REACH partnered with Bienestar to deliver programming that will be reflective and responsive to the needs of the community and committed to robust community engagement to provide further feedback into building design and programming.

Portland Housing Bureau also issued its Metro Bond Opportunity Solicitation (M-BOS) in the spring of 2021 for the Metro-owned site at 74th and Glisan in Northeast Portland. PHB's selection committee recommended Related NW as the preferred development partner for the property in late 2021. Related's proposal will construct 137 new units, including 56 units available to households earning 30 percent AMI or below (41 will be permanent supportive housing), and 63 family sized units (including 3 and 4 bedrooms). This project will advance PHB's LIS unit targets and contracting goals with 50 percent participation from COBID and DMWESB contractors. To address LIS goals related to racial equity, Metro established a community stakeholder committee prior to the M-BOS made up of people impacted by housing instability and homelessness, BIPOC, neighbors, and individuals with disabilities to create a statement of values for the site's development that would be used to partially score proposals. Two members of the stakeholder committee participated in the evaluation of the development proposals.

The Site Acquisition Program also partnered with PHB to acquire the Barbur Portland Value Inn at 10450 SW Barbur Blvd. PHB and the SAP anticipate offering the property as part of a solicitation later in 2022, but in the meantime, it will be used as a temporary homeless shelter operated by the Joint Office of Homeless Services and a non-profit partner.

These three sites meet many of the SAP's location-based LIS criteria. All are within a Metro Equity Focus Area and have a higher than regional average representation of People of Color or People with Limited English Proficiency. All sites are near high-frequency transit and amenities, and have limited existing supplies of nearby income-restricted housing. The 74th and Glisan site is within an area at risk of displacement and the Barbur Value Inn property is adjacent to the future Southwest Corridor, a major fixed-rail transportation investment. New affordable housing at these sites should help prevent additional displacement due to rising rents.

The SAP also anticipates future development in Clackamas County (Lake Oswego), Hillsboro, and Gresham. Metro, Lake Oswego, and the Housing Authority of Clackamas County (HACC) have entered into a Memorandum of Understanding outlining the SAP's acquisition of land from the city that was formerly used for construction staging. This property, located at W. Sunset and Boones Ferry Road may support approximately 50 multifamily units. Metro will purchase the site from Lake Oswego for appraised value (appraisal currently underway) and will work with city staff and HACC to release a developer solicitation. This property is in an area of Clackamas County with very limited existing affordable housing.

The SAP is under contract on a property in Hillsboro and is currently performing due diligence. The site is located within an area with limited affordable housing and in a Metro equity focus area with higher than average population of people of color and people with limited English proficiency. SAP and Hillsboro staff estimate the property could support approximately 60 units but will need to complete due diligence to confirm. The SAP anticipates contributing all its \$4.5 million Hillsboro allocation to this future project if it closes on the property.

Metro's Transit-Oriented Development Program previously purchased a property just northeast of the Civic Center MAX station in Gresham and anticipates contributing it to the SAP as a future Housing Bond project. The site is within a Metro equity focus area with a higher than average population of people of color and people with limited English proficiency.

Finally, the SAP is contributing its \$1.7 million allocation from unincorporated Multnomah County to Home Forward's future affordable housing project at SW 2nd St. and SW Kendall Ave in Troutdale. Home Forward staff are currently managing a community engagement process that will inform the estimated 100-unit project. The SAP did not purchase the site, however Home Forward and Metro decided to dedicate the funds to this project due to the relatively small allocation.

Beaverton and Metro do not anticipate SHS funding to be incorporated into the Elmonica Station project. It is still to be determined if it will be incorporated into other future projects.

Figure 1. SAP resources committed per jurisdiction

Project	Total Regional Site Acquisition Funds	Total SAP Funds Allocated to Date	Percent Allocated	Notes
Beaverton	\$3,460,066	\$3,460,066	100%	All funds invested in Elmonica Station
Clackamas County	\$12,909,788	TBD	TBD	Lake Oswego property purchase dependent on appraisal in process. Potential for one additional acquisition
Gresham	\$2,972,999	\$2,972,999	100%	All funds to be invested in Metro property near Gresham Civic Station
Hillsboro	\$4,517,453	\$4,517,453	100%	Metro has a property under contract. All funds to be invested in that project upon close.
Home Forward	\$1,764,347	\$1,764,347	100%	
Portland	\$23,450,731	\$23,450,731	100%	All funds committed to two projects: 74th and Glisan and Barbur Portland Value Inn
Washington County	\$12,940,615	\$0	0%	No acquisitions in Washington County yet

Figure 2. Production progress and resources committed per project

Project	Total Project Cost	Metro Bond Funds (SAP Allocation)	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 <i>Month/year</i>
			Total units	30% AMI units	Family sized (2+ BRs)	PSH units	For rental assistance	For wraparound services			
Elmonica Station	\$34,078,352	\$11,900,000 (\$3,460,066)	81	33	33	0	no	no	Concept	2/2023	6/2024
432 NE 74 th Ave	\$56,515,117	\$19,522,500 (\$11,550,000)	137	56	63	41	TBD	TBD	Concept	1/2023	5/2024
Barbur Value Inn	TBD	TBD (\$11,900,731)	80+ (est.)	TBD	TBD	TBD	TBD	TBD	Acquired	Q1 2024	Q1 2025
Lake Oswego (Clackamas Project)	TBD	TBD (TBD)	50+ (est.)	TBD	TBD	TBD	TBD	TBD	Negotiation		
Hillsboro Project	TBD	TBD (\$4,517,453)	60 (est.)	TBD	TBD	TBD	TBD	TBD	Under Contract		
Gresham Project	TBD	TBD (\$2,972,999)	TBD	TBD	TBD	TBD	TBD	TBD	Acquired		
Home Forward	TBD	TBD (\$1,764,347)	TBD	TBD	TBD	TBD	TBD	TBD			
Total committed or underway		\$36,165,596									
LIS commitment		\$62,016,000									
% of commitment complete		58.3%									
Remaining for LIS		\$35,045,506									

SECTION 2: PROJECT HIGHLIGHTS

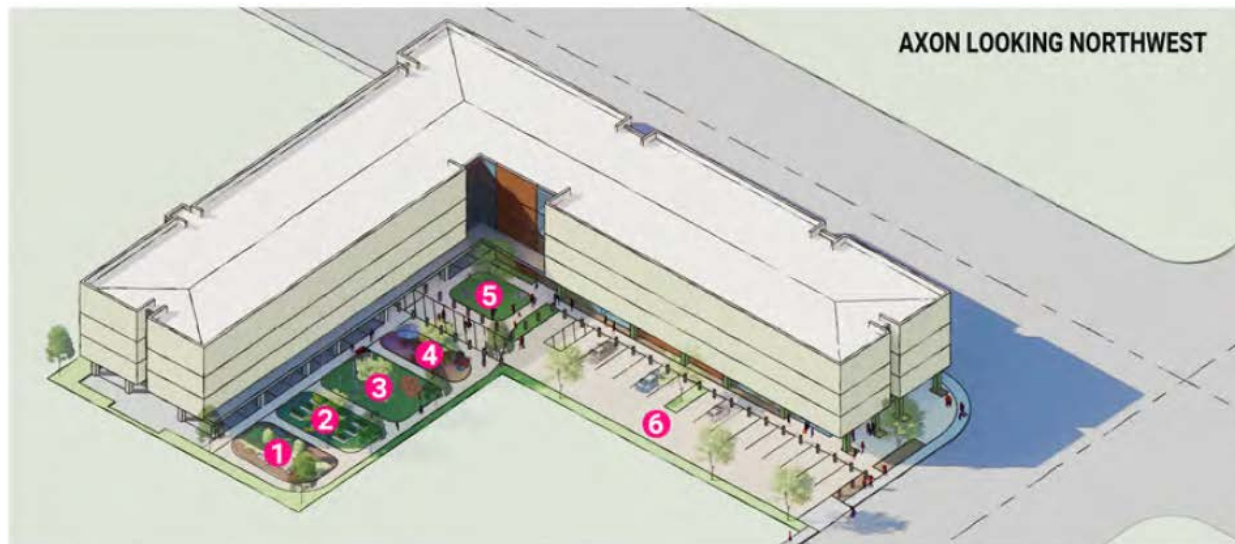
This section is intended to provide a brief overview of each project in the pipeline—and some of the noteworthy features.

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

- a. Number of units and unit mix (30% AMI, family-size, PBVs, PSH)*
- b. Description of the location*
- c. Who the project intends to serve*
- d. Project team and partnerships*
- e. Noteworthy features or highlights (e.g., community space, free wi-fi, climate resilience and sustainability)*

In 2021 two SAP projects (Elmonica Station and 74th and Glisan) completed a developer solicitation process and are at a stage of development where these questions can be answered.

Elmonica Station

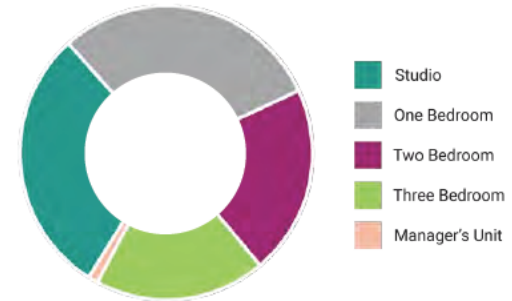


REACH CDC will develop Metro's 1.07 acre Elmonica Station Property at 17030 SW Baseline in Beaverton. The site was previously purchased by Metro's TOD Program and is located just north of the Elmonica MAX station.

REACH’s project concept envisions a four-story, L-shaped, 81-unit building that is tailored to the site’s geometry. REACH proposes three stories of wood construction over a concrete podium to help provide 59 tuck-under and surface parking spaces. REACH’s programming was informed by an engagement process conducted with members of the community living within their portfolio of affordable housing buildings. This process highlighted the importance of outdoor space that fosters community and pride in residence. As a response, REACH proposed a site plan that included a woonerf to help maximize outdoor areas while also addressing the Site’s constraints to access. Other outdoor amenities include a picnic/lawn area, play structures and a pedestrian walking loop. Indoor areas include a fitness room, full-sized kitchen, bike parking, and a community pantry operated in partnership with the Oregon Food Bank. Laundry rooms will be centrally located with flexible community spaces and play areas.

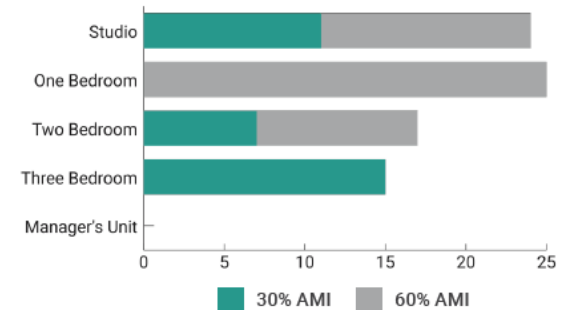
UNIT MIX

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%
TOTAL/AVERAGE	705	81	100%



AFFORDABILITY MIX

UNIT TYPE	NUMBER OF UNITS AFFORDABLE AT:		TOTAL
	30% AMI	60% AMI	
Studio	11	13	24
One Bedroom	0	24	24
Two Bedroom	7	10	17
Three Bedroom*	15	0	15
Manager's Unit			1
TOTAL	33	47	81
PERCENT OF UNITS	41%	58%	100%



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

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

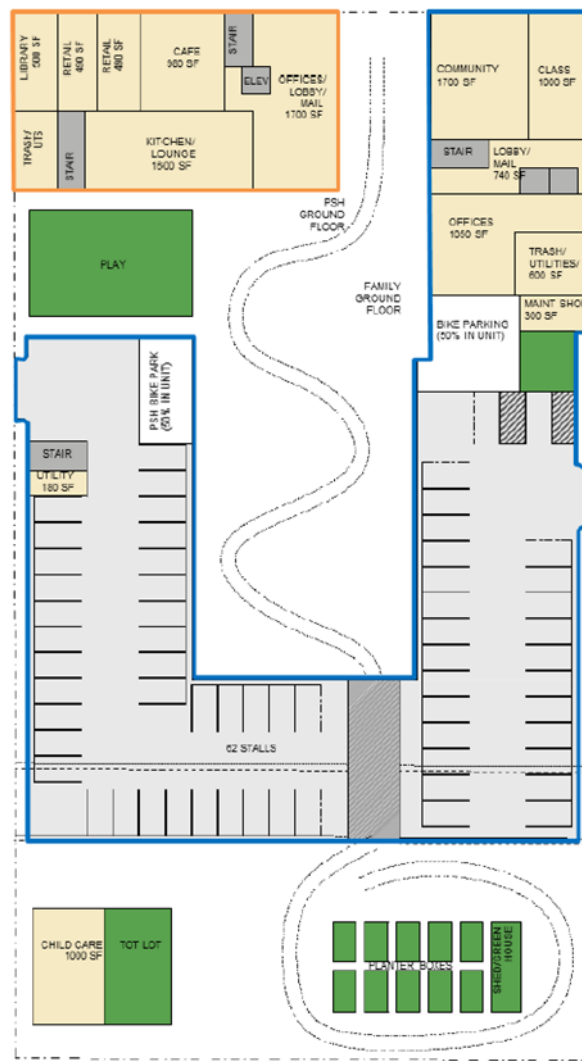
74th and Glisan

Related NW will develop Metro's property at 432 NE 74th Avenue in Portland. Related is partnering with Immigrant and Refugee Community Organization (IRCO) and Catholic Charities to develop the Site with 137 units that includes a 41-unit Enhanced Supportive Housing Building and a 96-unit family housing building. Mercy Corp NW will develop small business capacity with the inclusion of two retail incubator spaces and a "social impact café" with a culinary and barista training program in the ground floor commercial space. IRCO plans to co-locate their first multi-cultural preschool in Multnomah County at the Site, planned for the southern R2.5 portion of the property. The Supportive Housing portion of the project targets a population of BIPOC, seniors, homeless and survivors of domestic violence while the family-focused portion will target BIPOC, immigrant, refugee and intergenerational families.

Building A (outlined in blue in the figure) will include the 96 units of family housing, including studios, one-, two-, three-, and four-bedroom units ranging from 400 SF to 1,200 SF. Income levels will range from 30 percent to 60 percent. The building will be four stories tall and constructed with a concrete podium with 62 parking spaces. Building B, (outlined in orange) will include 41 permanent supportive housing studio units averaging 400 SF. These units will be supported by project-based vouchers and will serve residents earning 30 percent AMI or below. This building will include the retail incubator and café spaces and will activate Glisan.

Related Northwest is a division of Related California, a fully-integrated real estate firm with a 30 year track record of delivering affordable housing, mixed-income housing and mixed-use developments. The company has developed 16,000 residences and has more than 3,000 affordable units in predevelopment in San Francisco, Los Angeles, Irvine and Portland. Related is backed by The Related Companies, L.P. of New York, a privately owned real estate firm with over \$60 billion of assets.

Catholic Charities was founded in 1933 to combat poverty and injustice throughout Western Oregon by operating an array of programs and services to meet the needs of the most vulnerable people in the community regardless of faith. They will provide wrap



around services to the 41-unit permanent supportive housing units and expand on their experience operating the Kenton Women’s Village.

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

Mercy Corps was founded in 1976 as a global organization to alleviate suffering, poverty and oppression. Mercy Corp Northwest will provide educational opportunities and mentorship through their robust small business programs, barista training for the social impact café and housing referrals.

Humble Pie’s mission is to transform lives from the grips of addiction, criminal past and feelings of hopelessness by giving people a second chance and an opportunity to thrive in the workplace of their community. Humble Pie will operate the culinary and barista training program.



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

Elmonica Station

REACH CDC with Colas Construction and Salazar Architect established a 35 percent minimum goal for COBID-certified hard cost and professional services. The team has set an aspirational goal of 50 percent COBID participation for hard costs and 70 percent for professional services. Both Salazar and Colas are COBID certified firms and COLAS is a BIPOC-owned prime contractor with a history of developing a racially equitable and diverse construction workforce. The project is still in the early stages of design and progress towards achieving these goals will be provided in the future.

74th & Glisan

Related NW with LMC/ALMAR Impact Builders and Holst Architecture established a 35 percent minimum goal for COBID-certified hard cost and 30 percent for professional services. Holst is a certified women business enterprise and disadvantaged business enterprise. LMC is partnering with ALMAR Contracting, a BIPOC owned contractor, to help maximize participation from other BIPOC-owned subcontractors. The project is still in the early stages of design and progress towards achieving these goals will be provided in the future.

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)	
Elmonica Station	REACH CDC, Colas	35%	35%	Project is in schematic design stage
74 th & Glisan	Related NW, LMC/Almar	35%	30%	Project is in schematic design stage

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	
Elmonica Station	REACH CDC, Colas	TBD	TBD	TBD	Y	N/A	Not subject to prevailing wage
74 th & Glisan	Related NW, LMC/Almar	TBD	TBD	TBD	Y	BOLI	The SHS building will be built with BOLI prevailing wage while the family building will not.

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

Elmonica Station

The Elmonica Station site was previously purchased by the Metro Transit-Oriented Development Program and met many of the location criteria established in the SAP's LIS. The site is within a Metro Equity Focus Area, with limited existing affordable housing, and is less than a half mile walk to MAX. It is also nearby parks and open space as well as schools and other commercial amenities.

The project commits to include low barrier to entry screening and linguistically appropriate materials and translation services that reflect community demographics that are intended to be served. The team will be developing preference policies for multi-generational housing options and for homeless youth and families to ensure greater accessibility to the targeted communities. Bienestar will support outreach, marketing, and lease-up and ensure robust visibility and outreach for the target population. Bienestar's resident services staff is 100% multi-lingual, multicultural, and brings knowledge from lived experience from communities of color. Direct marketing and outreach marketing outlets will include word-of-mouth campaign with immigrants and refugees, traditional print, radio, and online media platforms through the networks of REACH, Bienestar, the Somali Empowerment Circle and Homeplate Youth Services. The building will utilize trauma-informed and universal design standards including accessible Type A units, hearing impaired units, multi-lingual signage and maximized natural light at commons spaces.

74th & Glisan

74th and Glisan was also previously purchased by the Metro Transit-Oriented Development program and met many of the location criteria established in the SAP's LIS. The site is within an area with little existing nearby affordable housing, and within an area at risk of displacement according to a City of Portland analysis. The site is also near TriMet's Route 20, a high frequency transit line, and the Route 19, scheduled to be upgraded to high frequency in the future. 74th and Glisan is near grocery stores and other commercial amenities that were established as a high priority during the SAP's initial engagement work.

The project will combat the displacement of BIPOC and immigrant families with targeted outreach, culturally specific services, and a focus on family-sized units. The development team will employ a grassroots approach for initial lease up and re-leasing efforts that begins with partner service providers such as Catholic Charities and local relationships. Project specific screening criteria will be reviewed by Related NW, Catholic Charities, Immigrant & Refugee Community Organization (IRCO), and Quantum property management. This team will set clear and consistent policy to override the screening criteria which includes credit, rental, and criminal history reviews.

The project will partner with organizations experienced in equity of service, providing culturally specific services, and those who have a strong presence in East Portland, with services that cater to local residents to provide access to services. Partners include: Catholic Charities, Immigrant Refugee Community Organization, Mercy Corps Northwest, Humble Pie, PDX Urban Gardens, and The Children's Book Bank.

Project name	Who the project seeks to serve	Plans/partnerships for affirmative marketing	Plans/partnerships for responsive services
Elmonica Station	Multi-gen families, homeless youth	Bienestar, Homeplate, Somali Empowerment Circle, REACH CDC	Bienestar, Homeplate, Somali Empowerment Circle, REACH CDC
74 th & Glisan	SHS and families in 2 buildings	Catholic Charities, IRCO, Quantum	Catholic Charities, IRCO, Mercy Corp, Humble Pie, PDX Urban Gardens, Children's Book Bank.

Physical accessibility features

Project name	Number of ground floor units	Number of ADA (Type A) units	Universal design (Y/N)	Notes on other accessibility elements
Elmonica Station	TBD	TBD	Y	Project at early stages of design
74 th & Glisan	TBD	TBD	Y	Project at early stages of design

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.

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	6	5	1	
List of organizational partners	Bienestar, HomePlate, Somali Empowerment Circle, IRCO, AYCO	Bienestar, Somali Empowerment Circle, IRCO, AYCO	Catholic Charities	

Elmonica Station

Prior to submitting a proposal during the Elmonica Station solicitation process, REACH led robust community engagement process over ten weeks with countless hours of work with: community members, existing residents, civic leaders, the design and construction teams, partner representation from Bienestar, representatives from each department at REACH, and the support of a leading DEI consulting agency (Multicultural Collaborative). With the help of Anita Yap, founder of the MultiCultural Collaborative and a leader in diversity, equity, and inclusion, the development team met with numerous community stakeholder groups and individuals in Washington County and at existing REACH properties. This outreach was conducted through focus groups, one-on-one interviews, and a multi-lingual online survey that received 125 responses.

Two of the key takeaways from initial community engagement were a desire to foster a sense of community, belonging, and pride from the moment residents and visitors approach the building, and the need to provide ongoing supportive services that meet the needs of youth experiencing homelessness. The conceptual design reflects this input with a site plan that weaves together indoor and outdoor amenity spaces, two outdoor plazas, covered pathways, and a woonerf or festival street. Community input is also reflected in the placement of studio units next to three-bedroom units to support convenient multi-generational living options with a family member

next door. The project team also learned of the deep need to support youth experiencing homelessness with a place to participate in supportive services and programming, leading to talks with HomePlate Youth Services to be a service partner.

As the project proceeds through the early design stages, REACH is continuing to engage focus groups to refine the project. Since selected as the preferred developer, REACH and Salazar Architect have met with BIPOC, people with a history of housing instability, and people with disabilities organized in four focus groups organized by HomePlate (six participants), Bienestar (seven participants), the City of Beaverton (five participants), and the Somali Empowerment Circle (nine participants). REACH is incorporating this feedback into the building design process and making revisions to building unit mix and communal space design.

74th & Glisan

Metro organized two community engagement activities to help create a statement of values for new affordable housing at its property on 74th and Glisan. A stakeholder group made up of 18 people from communities affected by housing instability and homelessness, including BIPOC community members, people who have been houseless and/or have lived in low income housing, and people who live and work near the site created a draft set of these values. Additional feedback through was provided through a survey sent to constituents of the stakeholder group and interested parties. These values were included in PHB's developer solicitation and respondents were scored on their proposal's responsiveness to these values. Two members of the stakeholder group also participated in the evaluation and scoring of proposals. A 25 page detailed report on this outreach process can be found [here](#).

Related NW will continue and evolve this culturally and linguistically responsive community engagement by working with We All Rise, a BIPOC-led consulting firm, along with partnerships between Catholic Charities and the Immigrant Refugee Community Organization. We All Rise's stakeholder engagement plan includes stakeholder reports at each phase of the project and ensuring the public has an opportunity to co-collaborate with the project team. There will be at least 3 focus groups in each phase, supplemented by interviews that will be conducted with stakeholders unable to attend focus groups. Outreach will also include direct mailers within a ¼ mile radius, articulating timelines, meetings, surveys, and general information. The project team plans to conduct at least 10 interviews. We All Rise intends to conduct targeted outreach in the form of direct emails and social media messaging once aspects of the project are finalized. The first phase of community engagement by We All Rise will be completed before finalizing the schematic design of the project.

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...						
				<i>% people of color</i>	<i>% people with low incomes</i>	<i>% older adults (over 60)</i>	<i>% limited English proficiency</i>	<i>% immigrants and refugees</i>	<i>% existing tenants in building</i>	<i>% people who have experience homelessness</i>
Glisan Survey	839	Y	94%	41%	43%	NA	NA	NA	NA	32%

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? 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?

REACH CDC and Colas Construction are currently in the process of receiving bids for both a dedicated outdoor air system and a packaged terminal heat pump system to provide cooling to the Elmonica Station project. REACH will factor in the cost of each system before committing to one of the options. The project is early enough in design that it can accommodate either method of cooling. Related NW's project at 74th and Glisan is also committed to providing air conditioning, but the exact method is not finalized yet.

The Site Acquisition Program will require that future projects include air conditioning of some sort in all future buildings and will include that requirement in new solicitations. The cost of that investment is the biggest challenge, and we will have a better idea of what that will be after bids for Elmonica Station's system comes in.

The SAP has no specific requirement for climate smart buildings but will include any requirements local implementing jurisdictions may have. The SAP does prioritize sites near transit in order to limit residents' dependence on single occupant car trips. Some areas far from the regional urban centers have limited pedestrian access to transit stops. Additional coordination could be helpful to connect new affordable housing with transit and other amenities through the construction of sidewalks and related infrastructure.

Housing Bond Progress Report for Gresham | 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.*

Gresham did not release a competitive selection in calendar year 2021.

- 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*

Gresham has 194 units under construction in 2021, with an average bond subsidy of approximately \$84,000/unit. Efficient use of Metro bond funds was a criteria used in the 2020 solicitation, and investments were selected that made a good use of bond funds and leveraged other sources such as Section 811 PRA. Albertina Kerr has passed savings onto residents by covering utility costs for residents.

- 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.*

With 77 units of 0-30% AMI under construction, Gresham has met the unit target for deeply affordable units.

- 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.)*

Gresham has exceeded the total unit target, and has 23 units of family-sized housing remaining with \$10.4M in funding. Gresham will be receiving further City Council input on priorities for a future solicitation. Priorities within Gresham’s LIS that have yet to be funded include rehabilitating existing, but not regulated, housing units as well as home ownership.

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			
Albertina Kerr	\$45,238,678	\$11,200,000	147	30	31	30	No	TBD	In construction	Jan-2021	June-2022
Rockwood Village	\$65,942,261	\$5,152,030	47	47	39		no	TBD	In construction	Jan-2020	March-2022
Total committed or underway		\$16,325,030.00	194	77	70	30					
LIS commitment		\$26,756,995.00	187	77	93						
% of commitment complete		61%	104%	100%	75%						
Remaining for LIS		\$10,431,965	Exceeds goal	0	23						

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*

The responses to Section 2 are best summarized in the Metro fact sheets for the project (see attached).

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*

Gresham's LIS stated that Project sponsors will be requested to achieve a target of 20% of total development costs for contracts to certified minority, women, and emerging small businesses pursuant to ORS 200.055. Both Albertina Kerr and Rockwood Village are on track to meet this goal, with Albertina Kerr currently projecting a total above 30%.

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

Gresham's LIS stated that Gresham is interested in encouraging participation in project workforce hours by minorities, women and disabled veterans. Gresham will work with Metro, other implementing jurisdictions, and with project sponsors to explore ways to maximize participation in project workforce hours. Albertina Kerr has been tracking workforce hours for women, minority, and apprenticeship hours. For the firms that were able to participate (11 firms total), the workforce utilization rates vastly exceeded the goals for minority hours works, are ~2/3 of the goal for women, and are at 75% of the goal for apprenticeship hours. Firms that did not participate were either under the \$250k contract amount, or had a prohibitive reason that were unable to participate.

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

Gresham's Bond program is closely coordinating with the City's Diversity, Equity, and Inclusion program, and working to develop city wide outcomes regarding procurement practices as well as COBID goals.

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)	
Albertina Kerr	Gerding Edlen/Pence	20%	20%	Currently projecting total of 32.15% of subcontractor COBID participation, with 27.01% MBE firms and 5.14% WBE firms.
Rockwood Village	CDP/LMC	20%	20%	Currently tracking a total of 20% with 6.% MBE and 14% WBE 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? Y/N	Prevailing wage BOLI, Davis Bacon, N/A	Notes and preliminary progress
		POC	Women	Apprentices			
Albertina Kerr	Gerding Edlen/Pence						
Rockwood Village	CDP/LMC						

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)*

Gresham's LIS location strategy identified that the overall portfolio of sites should increase choice for residents on where to live. This includes:

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

Both Albertina Kerr and Rockwood Village are located in areas well-served by transit with a variety of services, including services located on the campuses of both investments. Both projects have light-rail stations within a half-mile. Both projects are adjacent to grocery. Albertina Kerr provided street improvements, including sidewalks and bike lanes to improve active transportation.

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

Albertina Kerr will be using affirmative marketing practices to market the housing units to communities of color and persons with disabilities per the Affirmative Fair Housing Marketing Plan (AFHMP). Albertina Kerr will solicit feedback from referring and culturally specific organization to make desired low barrier screening criteria and leasing processes more responsive to our target populations, notably communities of color and those with disabilities. This additional feedback plan is outlined in the Community Engagement Plan in more detail. The project will include more direct outreach and marketing with referral organizations for both of its target populations prior to occupancy in order to ensure effective outreach and then successful lease-up. The management practices will include emphasis on low barriers to tenant access. Baseline low-barrier goals will be established for the following criteria, and evaluated as needed: lower income-to-rent requirements, identification requirements, lower application fees and deposits, and credit history requirements.

Rockwood Village marketing and leasing efforts have been centered around prospective residents and their needs, including providing low-barrier screening criteria focused around connections to local service organizations and multilingual resources. The marketing flyers for the property are available in seven different languages, based on the predominant languages of the existing Rockwood / Gresham community. Additionally, Property Management has been utilizing IRCO during leasing appointments with prospective residents as needed, and the Resident Services team with Hacienda has been available to assist residents with translations and the LIHTC paperwork process. The property website can be translated into 100+ languages and leasing forms are available in the online resident portal in just as many languages. In alignment with the AFHMP, several service organizations with clients in need of housing have received leasing information for the property including Hacienda (co-owner), NAYA, Urban League, Beyond Black, The Rosewood Initiative, APANO and IRCO.

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

For Albertina Kerr, OHCS will be managing the waitlist for Section 811 PRA units and the development team is working with them and the process to ensure that interested applicants can be clearly directed to a Referral Agent or other qualified state/county or other service provider to help and certify the applications to OHCS.

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

Albertina Kerr Workforce and Inclusive Housing provides a number of services to meet the needs of tenants. There will be two target populations for the building: 117 of these units be for those in the Direct Support Professionals workforce (DSP), including jobs such as nurse's aides, home health aides, and home-care aides, and 30 units will be for those with intellectual and developmental disabilities (I/DD). Additionally, the DSP target population is disproportionately people of color and women and are more likely to live in poverty and rely on public benefits, highlighting the need to help provide housing stability. Kerr will work with the Property Management company to carefully hire management staff with this cultural capacity and provide communications training where needed, notably to enable optimal communication with the residents with I/DD. If Kerr determines that there are areas of improvement, additional communications training and/or greater efforts in diversity outreach for staff hiring will be evaluated. Kerr's Programming efforts will aim to meet the social and supportive needs of the resident population via referral partnerships with local organizations, including culturally specific organizations. The plan to further identify additional needs of these populations beyond the outreach already conducted is outlined in the Community Engagement Plan provided to the City. The 30 units for those with I/DD will have integration with the State's K Plan which provides services to those living independently. With close partnerships, Kerr will increase the diversity of expertise and experience available to residents and allow for adaptation as resident needs and demographics change.

For Rockwood Village, Community Development Partners and Hacienda CDC are partnering with Hacienda Youth and Family Services to provide services at Rockwood 10. Hacienda has a proven track record of working closely with underserved populations and removing barriers to access housing, asset building opportunities, and educational opportunities.

Hacienda CDC employs a bilingual (English/Spanish) Resident Advocate who will work closely with property management staff and train them on assertive engagement with residents, trauma informed communication and culturally sensitive lease enforcement. The Resident Services Advocate will also conduct site visits with tenants and help identify their needs, which may include access to a food pantry, rental assistance, assistance with housekeeping or public/behavioral healthcare. Working with tenants to ensure successful tenancy, mitigate risk and prevent eviction is a large part of the Advocates' role.

Hacienda's emphasis on education for residents from birth through adulthood, coupled with asset building and entrepreneurial initiatives, is a proven model for success, providing critical support to low-income children and strengthening their family units for the long-term. Hacienda's core programs are Real Estate Development, Portland Mercado and Entrepreneurship, Youth and Family Services, Resident Services and Economic Opportunity.

Rockwood Village has collected a survey from the first residents that have moved in to obtain interest for future workshops. The project has also scheduled a series of workshops to introduce the Resident Services Coordinator and explain the range of services on site. The project has also hosted an internet assistance event with Arrobas Learning Center, applied to Energy Trust of Oregon to bring energy efficiency workshops, conducted a toy drive at the holidays with Hacienda's Expresiones program, and developed a move-in packet with a variety of services available through Hacienda and Multnomah County. Hacienda's Expresiones program is initiating STEM and art based programs for youth.

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

For Rockwood Village, of the applicants that voluntarily provided race/ethnicity so far, 29% identified as white, 27% identified as Hispanic, 12% as African American, 10% Native American, 6% Asian, and 16% other.

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
Rockwood Village	Residents earning below 30% AMI, families.	Several service organizations with clients in need of housing have received leasing information for the property including Hacienda (co-owner), NAYA, Urban League, Beyond Black, The Rosewood Initiative, APANO and IRCO.	Hacienda CDC will provide resident services programming, including through an on-site community building.
Albertina Kerr	The project will house direct support professionals (117 units) and adults with developmental and intellectual disabilities (30 units spread throughout the project to help prevent isolation).	Albertina Kerr will be using affirmative marketing practices to market the housing units to communities of color and persons with disabilities per the Affirmative Fair Housing Marketing Plan (AFHMP). Albertina Kerr will solicit feedback from referring and culturally specific organization to make desired low barrier screening criteria and leasing processes more responsive to target populations, notably communities of color and those with disabilities.	As the housing development is located on the site of Albertina Kerr’s campus, residents will be able to access services. Project is also partnering with Boys and Girls Club which has a site close by to offer a variety of family services.

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.

Due to the ongoing challenges of COVID as well as staff capacity, community engagement for 2021 was limited. It included a virtual Diversity in Housing Forum, as well as a virtual Community Needs meeting. The Diversity in Housing Forum is available at: <https://www.youtube.com/watch?v=kaHb5BG5650>

- 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.

Approximately 50 people participated in the two meetings, summarized below.

- c. Summarize major themes of feedback (WHAT YOU HEARD, e.g. “participants want more large units or garden space,” etc.)
- *Need to link housing to job opportunities*
 - *Housing that is affordable continues to be a significant challenge for residents*
 - *Concern from the community about displacement; project investments need to focus on people and stability*
- 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)
- Themes will continue to inform a future solicitation, including the solicitation criteria.*

- 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 (not culturally specific or faith based)
Number of partnerships	5	2		3

List of organizational partners		Hacienda CDC, National Association of Minority Contractors.		Habitat for Humanity, Community Alliance of Tenants, Human Solutions
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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...						
				<i>% people of color</i>	<i>% people with low incomes</i>	<i>% older adults (over 60)</i>	<i>% limited English proficiency</i>	<i>% immigrants and refugees</i>	<i>% existing tenants in building</i>	<i>% people who have experience homelessness</i>
Diversity in Housing Forum	~30	N								
Community Needs Meeting	~20	N								

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?

Both the Albertina Kerr and Rockwood Village investments have submitted cooling plans to Metro. These include cooling common areas and community rooms, and the ability for in-unit air conditioning which both projects are exploring additional funds from Metro to provide by the end of construction. Gresham has been working to understand best practices from developers within the city, including looking at cost-benefit financing models for different cooling approaches. Gresham is also tracking and supporting state legislative approaches to make cooling more widely available. It is clear that incorporating cooling plans with clear expectations and goals as early as possible in the development process is important. Regional coordination could include exploring best-practices in cost-benefit of various cooling solutions.

METRO HOUSING BOND QUARTERLY REPORT | OCTOBER-DECEMBER 2021

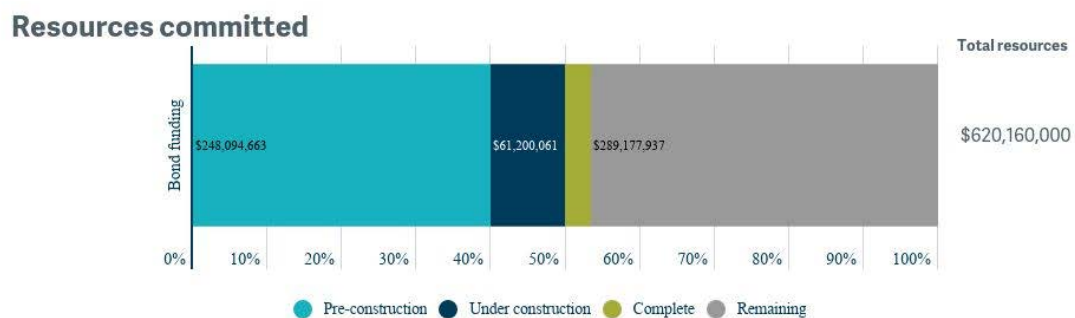
February 23, 2022

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>			1,105	435	502	237	
<i>Total unit production targets</i>			1,475	605	737	300	
<i>% of commitment complete</i>			74.9%	71.9%	68.1%	79%	
<i>Total committed or underway</i>			\$121,483,656				
<i>Total LIS funding</i>			\$211,056,579				
<i>% of funding committed</i>			57.5%				
<i>Remaining LIS funding</i>			\$89,572,923				

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
Total units in pipeline			808	318	395	163	
Total unit production targets			814	334	407	100	
% of commitment complete			99.8%	95.8%	98.3%	N/A	
Total committed or underway				\$99,074,088			
Total LIS funding				\$116,465,532			
% of funding committed				85.1%			
Remaining LIS funding				\$17,391,444			

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
Total units in pipeline			459	201	290	117	
Total unit production targets			812	333	406	0	
% of commitment complete			56.5%	60.3%	71.4%	N/A	
Total committed or underway				\$48,351,542			
Total LIS funding				\$116,188,094			
% of funding committed				41.6%			
Remaining LIS funding				\$67,836,552			

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
Total units in pipeline			149	60	105	8	
Total unit production targets			284	117	142	0	
% of commitment complete			52.4%	51.2%	74%	N/A	
Total committed or underway			\$16,940,731				
Total LIS funding			\$40,657,081				
% of funding committed			42%				
Remaining LIS funding			\$23,716,350				

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
Total units in pipeline			194	77	70	30	
Total unit production targets			187	77	93	0	
% of commitment complete			104%	100%	75%	N/A	
Total committed or underway			\$16,341,505				
Total LIS funding			\$26,756,995				
% of funding committed			61%				
Remaining LIS funding			\$10,431,965				

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
Total units in pipeline			298	56	145	0	
Total unit production targets			218	89	109	N/A	
% of commitment complete			136.6%	63%	133%	N/A	
Total committed or underway			\$23,900,000				
Total LIS funding			\$31,140,595				
% of funding committed			76.7%				
Remaining LIS funding			\$7,240,595				

*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.***

Project	Endorsement/Approval
Elmonica	Concept Endorsement
74 th 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

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

REVENUE

	FY 2018 - 2021	FY 2021 - 2022	TOTAL REVENUE
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
TOTAL REVENUE:	\$680,589,198	\$2,810,452	\$683,399,650

<--- "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
Jurisdiction:						
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
TOTAL:	\$59,179,400	\$28,591,407	\$243,211,256	\$330,982,063	\$ 620,160,000	53.37%

*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
Jurisdiction:					
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%
TOTAL:	\$7,634,804	\$2,773,753	\$10,408,556	\$32,640,000	31.89%

** 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