

# City of Beaverton Local Implementation Strategy

## Metro Staff Evaluation Worksheet

July 17, 2019

LOCAL IMPLEMENTATION STRATEGY REQUIREMENT CHECKLIST

Meets requirements?		Local implementation strategy requirements	Metro Staff Notes
Committee member review	Staff review		
<input type="checkbox"/>	√	Anticipated number, size, and range of project types (estimates are acceptable) and cost containment strategies to achieve local share of unit production targets (including 30% AMI and family-size unit goals and the cap on units at 61-80% AMI) using local share of eligible funding;	<p><b>Anticipated Project Types:</b> Portfolio approach to achieving the unit production targets, and monitoring and adjusting the LIS as needed using a tracking worksheet considering funds available and remaining goals to be achieved. (See p. 12). Exhibit 2 to the LIS provides initial portfolio modeling showing estimated/anticipated bond allocation and unit production across four projects (See p. 36). Beaverton is not considering investing Bond resources in homeownership strategies (See p. 18).</p> <p><b>Cost Containment:</b> Beaverton will evaluate proposed projects to ensure that costs are reasonable and appropriate to the project, with a focus on bond funds needed rather than the total development costs of projects. Considerations will include: appropriate scale for target population and neighborhood, costs of mixed-use development, quality of construction materials, costs associated with anticipated service needs, and reasonable fees and reserves. The City acknowledges the need to achieve an average Metro bond expenditure per unit of \$143,000, and states that additional local resources may be needed to achieve the production goals. According to Exhibit 2, the City estimates a deficit of \$2.3 million to achieve the framework goals. (See pp. 19-20)</p> <p><b>Distribution of Family-Sized Units:</b> The ratio of small and large (2+ bedroom) units will reflect the characteristics of the target population. (See p. 17)</p> <p><b>Distribution of 30% AMI Units:</b> All projects are anticipated to include some units with rents at 30% AMI, and some projects may include higher concentrations of 30% AMI units as long as there is ongoing funding for supportive services. (See p. 17)</p> <p><b>Strategy Review</b> Beaverton plans to take a portfolio approach, monitoring and adjusting the LIS (Exhibit 2) when appropriate. Because the pace of implementation is uncertain, these review points will not occur at specific points in time but instead will be based on the commitment of Bond resources to specific projects. (See p. 12)</p>
<input type="checkbox"/>	√	Consideration for how new bond program investments will complement existing regulated affordable housing supply and pipeline;	<p><b>Summary of existing need/supply:</b> Currently, the City of Beaverton has 876 regulated affordable housing units that are disbursed across the city. In 2016, the City of Beaverton contracted with Angelo Planning Group and Johnson Economics to complete a Housing Strategies Report, including anticipated housing needs. The study estimated a need for 2,663 affordable rental units, including 841 units at 30% AMI and below. The February 2019 “Tri-County Equitable Housing Strategy to Expand Supportive Housing for People Experiencing Chronic Homelessness” strategic plan identified a need for 226 PSH units in Washington County. The private rental housing market has concentrated on small unit sizes, a concern identified by many residents during listening sessions. (See pp. 3-4)</p> <p><b>Pipeline:</b> While much of Beaverton’s efforts during the implementation of the Housing Bond will be focused on moving the pipeline of Bond funded projects forward, the ongoing availability of other Federal and State affordable housing resources means that there is a likelihood other projects may move forward during the same timeframe. Beaverton will monitor the pipeline of projects proposed and funded in Beaverton and will collaborate with developers to identify the most appropriate funding packages and other</p>

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			support that can be allocated to those projects. (See pp. 16-17) Beaverton seeks to align Housing Bond implementation with the city's other local affordable housing activities, including working with property owners to identify ways to improve housing stock while avoiding forced displacement of tenants, collaborating with market rate developers to include restricted units in their development, working with homebuilders to increase affordable homeownership stock and providing down-payment assistance for additional homeownership opportunities. (See p. 18)
<input type="checkbox"/>	√	Goals and/or initial commitments for leveraging additional capital and ongoing operating and/or service funding necessary to achieve the local share of Unit Production Targets;	<p><b>Leveraged funding:</b> The LIS describes leveraging “principles” including maximizing the use of non-competitive and private resources, maximizing local resources, and seeking federal/state/county resources. Washington County Housing Services has committed 33 project-based Section 8 rental assistance vouchers to support Beaverton Bond projects. (See pp. 16-17).</p> <p>Based on existing estimates in Exhibit 2, the City estimates a deficit of \$2.3 million to achieve unit production goals, and states that local resources may need to be committed to fill this gap. (See p. 20)</p> <p><b>Leveraged services:</b> Beaverton will work with regional and state partners to identify a consistent funding source to serve vulnerable homeless or at risk populations. (See p. 17)</p>
<input type="checkbox"/>	√	Strategy for aligning resident or supportive services with housing investments, including [optional] any local goals or commitments related to permanent supportive housing; and	<p><b>Supportive Services:</b> Beaverton strives to work with the County and other public partners to identify opportunities to include PSH units within the 89 deeply affordable units the City will fund. (See p. 4)</p> <p>Projects serving high needs populations will require robust supportive services to ensure resident stability and positive outcomes. While Beaverton is not a significant provider or funder of supportive services, it is available, in partnership with Washington County, to help connect developer/owners to public and private service providers in the community to create needed partnerships. Beaverton will evaluate each project's target population and service plan to ensure that it is appropriate and durable. (See p. 19)</p> <p><b>Resident Services:</b> Beaverton will require resident service coordination to be provided at all projects, appropriate to the level of need of the target population. Resident Services will focus on eviction prevention, helping residents access mainstream services for which they may be eligible, and community building activities. (See p. 19)</p>
<input type="checkbox"/>	√	Description of project selection process(es) and prioritization criteria, including anticipated timing of competitive project solicitations and how existing or new governing or advisory bodies will be involved in decisions regarding project selection.	<p><b>Project selection process:</b> Beaverton does not intend to be a developer or owner of housing funded under the bond. The City plans to select four projects through a process that will include public and open solicitations. Every solicitation document will include a set of expectations for all developers/owners to ensure selected projects achieve both the framework goals and racial equity outcomes. These will include a joint RFP with Metro for the Metro-owned Elmonica site, a second RFP or RFQ for a yet-to-be-determined site, and one project to be selected through a NOFA process specifically targeting developer proposed sites with little or no affordable housing and emerging areas near good schools. (See p. 13)</p> <p><b>Prioritization criteria for site acquisition:</b> The City is exploring other possible City-owned sites for Housing Bond projects. Based on community feedback, the City plans to consider the following factors in site selection:</p> <ul style="list-style-type: none"> <li>• Beneficial leverage of free or discounted land</li> <li>• High opportunity areas, as defined by access to good transit, good schools, services and other amenities</li> <li>• Opportunities to meet community development goals or develop beneficial service partnerships, and/or</li> <li>• Opportunities to use 4% LIHTC resources</li> </ul> <p>(See pp. 14-15)</p>

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<input type="checkbox"/>	√	Location strategy that considers geographic distribution of housing investments, access to opportunity, strategies to address racial segregation, and strategies to prevent displacement and stabilize communities;	<p><b>Geographic Goals</b> Beaverton desires to support projects in opportunity neighborhood that have good access to transportation, community amenities, and provide the opportunity to create inclusive mixed-income amenities. Beaverton will seek to disperse units throughout the city, where these locational attributes meet. The City will work with property owners to identify ways to improve the housing stock while avoiding forced displacement of tenants, collaborating with market rate developers to include affordable/restricted units in their development, working with homebuilders to increase affordable homeownership stock, and providing down-payment assistance for additional affordable home ownership opportunities. (See p. 18)</p> <p><b>Strategy</b> Every solicitation document will include a set of expectations for all developers/owners to ensure selected projects achieve both the framework goals and racial equity outcomes. These requirements include a 60-year affordability covenant, inclusion of minority and women owned contractor participation in the development process, and the use of best practice outreach and tenant selection criteria. (See p. 13)</p>

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			<p>The City will prioritize sites if they support the Implementation Strategy goals and are consistent with feedback from a Housing Technical Advisory Group (HTAG) as well as the City's Real Estate Committee (REC). The City will take into consideration:</p> <ul style="list-style-type: none"> <li>▪ The beneficial leverage of free or discounted land;</li> <li>▪ High opportunity areas, these areas are defined by with access to good transit, good schools, services, and other amenities</li> <li>▪ Opportunities to meet community development goals or develop beneficial service partnerships; and/or</li> <li>▪ Opportunities to use 4% LIHTC resources (See p. 14-15)</li> </ul>
<input type="checkbox"/>	√	Fair housing strategies and/or policies to eliminate barriers in accessing housing for communities of color and other historically marginalized communities, including people with low incomes, seniors and people with disabilities, people with limited English proficiency, immigrants and refugees, and people who have experienced or are experiencing housing instability;	<p><b>Affirmative Marketing, Tenant Selection &amp; Lease-Up.</b> Beaverton will require that project developers/owners make best faith efforts to make units available to minorities and disadvantaged populations using best practice strategies. In general, this will require:</p> <ul style="list-style-type: none"> <li>▪ Affirmative outreach and marketing to target populations. Developers/owners, and their property management companies (if applicable) will be expected to engage in pro-active efforts to make disadvantaged populations aware of the availability of units, and the process and timeline for application. Beaverton will work with project sponsors to identify specific target populations for each project and will review the proposed outreach and marketing strategy for each project.</li> <li>▪ Beaverton will require that project sponsors use low barrier screening criteria that balances access to target populations, project operations, and community stability. Typical requirements may include less than standard market apartment income-to-rent ratios, reduced credit history requirements, and criminal history requirements that only consider recent convictions that are most directly tied to tenant success. Project sponsors will be required to review appeals to denials of standard screening criteria that take into consideration efforts of applicants that demonstrate stability and potential for tenant success. Project sponsors are also required to review appeals if the disqualifying aspects of a denial are related to a disability and make reasonable accommodations as appropriate.</li> </ul> <p>(See p. 23)</p>
<input type="checkbox"/>	√	Strategies and/or policies, such as goals or competitive criteria related to diversity in contracting or hiring practices, to increase economic opportunities for people of color;	<p><b>MWESB Contracting</b> Bond project sponsors will be required to make good faith efforts to achieve 20% subcontracting participation on the development hard and soft costs to COBID certified MWESBDVs. Specific NOFAs, RFQs or RFPs may have additional goals or requirements. Those responding to Bond offerings will be required to provide documentation of how they intend to meet COBID subcontracting effort requirements, and successful awardees will be required to report their ongoing project participation to the City. In order to reach these goals, the City hopes to assist contractors make connections with agencies who work with the promoting, hiring and development of MWESB-DVs. The City has been proactive in meeting with Trade Associations and attending events to promote upcoming Bond projects in the region.</p> <p><b>Workforce and Apprenticeship Participation.</b> Beaverton is interested in understanding the labor force make-up of each project and encouraging the utilization of apprenticeship programs. The City will track the labor force demographic and hours worked by each apprentice. While specific programs to further this goal are not developed at the time of writing the LIS, staff has engaged in conversation and outreach to pre-apprenticeship programs such as Oregon Tradeswomen, Constructing Hope and Portland Opportunities Industrialization Center. The city will also engage Metro, other implementing jurisdictions, and project sponsors to explore ways to maximize apprenticeship participation.</p> <p>(See p. 22-23)</p>
<input type="checkbox"/>	√	Requirements or competitive criteria for projects to align culturally specific programming and	<p><b>Project selection consideration</b> Beaverton will take into consideration the following factors: Supporting project teams that have a proven track record of:</p>

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		supportive services to meet the needs of tenants.	<ul style="list-style-type: none"> <li>▪ Outreach, engagement, and ensuring participation of minority and women owned contractors in pre-development and construction of the project, as well as the on-going maintenance of the building;</li> <li>▪ Engaging targeted and/or marginalized communities, communities of color as part of its leasing process;</li> <li>▪ Creating an inclusive tenant screening criteria process, minimizing barriers to housing experience by communities of color;</li> <li>▪ Providing culturally specific resources and services. Beaverton recognizes that culturally specific programs can achieve strong outcomes for diverse groups in the community</li> </ul> <p>Beaverton will prioritize projects addressing the historical racism and lack of housing access experienced by communities of color, whether that is represented by projects sponsored by culturally specific organizations, or projects sponsored by partnerships in which culturally specific organizations have a meaningful role in project design and operations, or sponsors provide sufficient proof of their ability to connect with communities of color.</p> <p>Beaverton expects that Resident Service Coordination will be provided at all projects, appropriate to the level of need of the target population. Resident Services will focus on eviction prevention, helping residents' access mainstream services for which they may be eligible, and community building activities</p> <p>(See p. 19)</p>
<input type="checkbox"/>	√	Engagement activities focused on reaching communities of color and other historically marginalized communities, including people with low incomes, seniors and people with disabilities, people with limited English proficiency, immigrants and refugees, and people who have experienced or are experiencing housing instability;	<p><b>Engagement Summary and Outcomes</b></p> <p>Events were hosted in trauma informed spaces and environments to ensure inclusivity. The City of Beaverton also partnered with Washington County and the City of Hillsboro to supplement findings and extend resources for engagement and outreach that resulted in hearing 451 community members and over 100 agencies (See Exhibit 1). The City of Beaverton has established boards and commissions (40% of members self-identify as a person of color) that provide input and feedback in city related activities and initiatives. Staff made presentations to and sought input from the Beaverton Committee for Community Involvement (BCCI), Human Rights Advisory Committee (HRAC), Beaverton Committee on Aging, and the Diversity Advisory Board (DAB).</p> <p>To engage the community at large, over 80 community members attended a widely publicized listening session. This listening session included city board and commission members who acted as volunteer facilitators during breakout sessions. At this session, attendees were able to vote electronically after discussing the six listening session questions in small groups to provide live input to staff throughout.</p> <p>At all Beaverton events interpretation/bilingual facilitators was available and actively utilized, childcare was provided, and refreshments were available. Events also utilized live polling to capture in-depth feedback. To make engagement opportunities inclusive and accessible events and presentations were conducted in a variety of locations, languages, and times. Every effort was made to approach all community engagement activities through a lens of equity and inclusion, with special attention paid to reaching historically underrepresented groups. Efforts were made to reach low income community members, people of color, people with limited English proficiency, immigrant and refugees, senior residents and people who have experienced housing instability by hosting targeted opportunities directed towards the Arabic community, Latino parents in the Beaverton School District, and Habitat for Humanity clients and by attending meetings for groups and organizations representing these communities.</p> <p>Through opportunities detailed above, the City of Beaverton was able to hear feedback from <b>over 200 people</b>. 69% percent of those who attended feedback events were people of color, where demographic information was provided. Demographic information was collected at events in table marked with an asterisk. This included 8 presentations, events, and meetings.</p> <p>(See pp. 25-26 and 31)</p>

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<input type="checkbox"/>	√	Summary of key community engagement themes related to local housing needs and priority outcomes for new affordable housing investments, approach to geographic distribution and location strategies, acknowledgement of historic/current inequitable access to affordable housing and opportunities for stakeholders to identify specific barriers to access, and opportunities to advance racial equity through new investments;	<p>5 categories were identified in City of Beaverton Specific Events Engagement Results: barriers, service needs and location.</p> <p><b>Barriers</b></p> <ul style="list-style-type: none"> <li>• Cost (56%)</li> <li>• Screening Criteria (12%)</li> <li>• Navigation (13%)</li> </ul> <p><b>Service needs</b></p> <ul style="list-style-type: none"> <li>• Education (42%)</li> <li>• Service Alignment (46%)</li> <li>• Addictions/Mental Health or other Case Management (8%)</li> </ul> <p><b>Location</b></p> <ul style="list-style-type: none"> <li>• Services (29%)</li> <li>• Safe/Sense of community (48%)</li> <li>• Transit (17%)</li> </ul> <p>(See p. 35-36 for full summary of detail within each category)</p> <p>In the widely publicized listening session, the key take-away from this event included a need to having access to affordable/stable housing, and the challenge of income not keeping up with housing costs/rent increases (See p. 6). Key comments from of three listening sessions with Habitat for Humanity clients, Arabic-speaking event and Latino Family Night was the need for family size housing, including a larger number of 3 and 4 bedroom units, and proximity to good school and other amenities. (See p. 7)</p>
<input type="checkbox"/>	√	Summary of how the above themes are reflected in the Local Implementation Strategy.	<p><b>Local Implementation Strategy Goals</b></p> <ul style="list-style-type: none"> <li>▪ Geographic Goals –During listening sessions and the feedback phase, requests were made for housing with access to schools and amenities. These areas include the emerging downtown, recently annexed areas, and areas where private/public investment is being made to improve the livability of the area. (Location)</li> <li>▪ Target Population Goals – During the Listening phase, the city received reminders of the need for senior housing, family housing (to include three and four-bedroom units), housing accessible to high needs populations, housing that is compliant with the American with Disabilities Act (ADA), and housing for individuals exiting the foster care system. Due to limited resources and the small number of projects to be funded under the bond, addressing all these needs will not be feasible, but the city will strive to assist as many of these needs as possible. (Target Population)</li> </ul> <p>(See p. 18)</p> <ul style="list-style-type: none"> <li>▪ Increasing affordable housing in areas with existing underserved diverse populations, especially in areas that may be subject to displacement (Barriers).</li> <li>▪ Providing new affordable housing in high opportunity neighborhoods and sites. This would include sites that have good access to transit, jobs, quality schools, commercial services, parks &amp; open space, etc. (Location)</li> <li>▪ Supporting project teams that have a proven track record of: <ul style="list-style-type: none"> <li>o Engaging targeted and/or marginalized communities, communities of color as part of its leasing process (Barriers);</li> <li>o Creating an inclusive tenant screening criteria process, minimizing barriers to housing experience by communities of color (Barriers);</li> <li>o Providing culturally specific resources and services. Beaverton recognizes that culturally specific programs can achieve strong outcomes for diverse groups in the community (Service needs).</li> </ul> </li> </ul> <p>(See p. 20)</p>

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<input type="checkbox"/>	√	Strategies for ensuring that ongoing engagement around project implementation reaches communities of color and other historically marginalized community members, including: people with low incomes, seniors and people with disabilities, people with limited English proficiency, immigrants and refugees, existing tenants in acquired buildings, and people who have experienced or are experiencing housing instability; and	<p>Community engagement opportunities will be organized to allow people to engage across a spectrum of interest levels:</p> <ul style="list-style-type: none"> <li>• <b>Inform Community Members:</b> Some community members will be interested in hearing the highlights about the Local Implementation Strategy for the bond; others will continue to track the process and stay up to date on the latest project news. Staff will use multiple methods of outreach to inform community members about the bond implementation process and major project milestones to ensure community members stay informed. Staff will provide information to assist the public in understanding the decisions made throughout the planning process and implementation information will be made broadly accessible through multiple means, channels, and sources.</li> <li>• <b>Consult Community Members:</b> Some community members will want to make sure the process and outcomes of the LIS broadly address the topics they are interested in. These individuals may desire to weigh in and provide feedback at key points in the process and have their voice be heard. Opportunities for such feedback will be provided via open houses, housing forums, City Council meetings.</li> <li>• <b>Involve Community Members:</b> Some community members, such as the Housing Technical Advisory Group (HTAG), relevant Beaverton Boards &amp; Commissions, and other community groups will want to contribute concerns and directed advice throughout bond implementation on a long-term basis. Staff will engage these groups with timely and direct answers to questions, regular updates, and sit-down meetings when possible to discuss the feedback in greater depth. These groups may also act as “champions” of affordable housing and voice their support throughout project selection and development.</li> </ul> <p>(See p. 25-26)</p> <p><b>Outreach recommendations from City of Beaverton Community Engagement</b> Use the following media outlets:</p> <ul style="list-style-type: none"> <li>▪ Internet</li> <li>▪ Word of Mouth</li> <li>▪ Leveraging Partner Organizations</li> <li>▪ Utilizing Community Locations</li> <li>▪ Cellphone Based</li> <li>▪ Creating Database of housing for renters and landlords</li> <li>▪ Print Media</li> </ul> <p>The internet, using word of mouth outreach through community leaders and networks, leveraging partner organizations, and utilizing well-known community-specific locations (i.e. library, places of worship, etc.) were the main recommendations. However, several people noted that internet access is limited; necessitating continued and expanded print marketing to ensure affordable housing outreach is accessible to all. One idea that came out of this conversation was the need to create a “brand,” so the community would know the availability of housing notice is from a trusted source. (See p. 34)</p> <p>Additionally, the City of Beaverton’s approach to racial equity in project selection will take into consideration supporting project teams that have a proven track record of engaging targeted and/or marginalized community, communities of color as part of its leasing process. (See p. 20)</p>
<input type="checkbox"/>	√	Strategy for ensuring community engagement to shape project outcomes to support the success of future residents.	<p><b>Organizational Plan</b> In-house staff will be responsible for community engagement and outreach, project selection process, project documentation and funding processes, as well as overall program monitoring and reporting. In addition to the city’s General Fund dollars supporting the housing staffing necessary to implement the bond, Metro has also committed \$655,591 over five years to augment Beaverton’s staffing plan for bond implementation. Initially, Beaverton anticipates these funds will support the addition of one full time equivalent position for community engagement, racial equity work, and monitoring restricted covenants via regulatory compliance agreements. City Council approved this new position effective April 1, 2019. (See p. 12)</p>

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			The City of Beaverton is in the process of creating a Housing Technical Advisory Group (HTAG), which will provide feedback to staff and advise the Mayor on affordable housing related manners, including Housing Bond projects. Like many other City of Beaverton advisory groups, every attempt will be made to ensure gender/ethnic diversity as well as industry and end-user expertise. (See p. 13)
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