

# Washington County Local Implementation Strategy Metro Staff Evaluation Worksheet

July 17, 2019

LOCAL IMPLEMENTATION STRATEGY REQUIREMENT CHECKLIST

| Meets requirements?      |              | Local implementation strategy requirements  | Staff Notes  |
|--------------------------|--------------|---|--|
| Committee member review  | Staff review |   |  |
| <input type="checkbox"/> | √            | <p>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> | <p><b>Anticipated Project Types:</b><br/>Portfolio “scenario” describes 13 projects ranging in size from 5-175 units, with an average project size of 64 units. This scenario is labeled as “for illustrative purposes only.” (See pp. 31-32)</p> <p><b>Cost Containment:</b><br/>The Plan states that the “amount of funding allocated to a project will be determined by the number of units at 30% MFI and whether the projects include family-size units” and acknowledges that in order to achieve overall unit production goals the average bond investment per unit will be approximately \$143,000. General strategies and principles for cost containment are described. These include design for energy/water efficiency, durability, and healthy spaces; strategies to leverage a range of funding sources; and a commitment to evaluate projects based on principles identified by Meyer Memorial Trust’s Oct. 2015 Cost Efficiencies Report. (See pp. 12, 22-23)</p> <p><b>Distribution of Family-Sized Units:</b><br/>The LIS expects that most developments will include units with two or more bedrooms. Selection criteria will give preference to projects with 3- and 4-bedroom units. (See p. 12 and p. 20)</p> <p><b>Distribution of 30% AMI Units:</b><br/>The Plan states that most projects will include units for residents with incomes of 30% or less of AMI, and that these units will be targeted to very low income households and may serve low wage earners, people with disabilities or special needs, or people who have experienced homelessness. “With the appropriate non-profit or for-profit organization skilled in delivering supportive housing with services, some projects may be designed exclusively to have 30% MFI units or have high concentrations of 30% MFI units.” (See p. 20).</p> <p><b>Strategy Review</b><br/>The LIS describes a process for reviewing the strategy at 18-24 months and 48-60 months, in anticipation of potential changes to community needs and opportunities. (See p. 29)</p> |
| <input type="checkbox"/> | √            | <p>Consideration for how new bond program investments will complement existing regulated affordable housing supply and pipeline;</p>  | <p><b>Summary of existing need/supply:</b><br/>The LIS summarizes data regarding affordable housing need and existing supply for Washington County and jurisdictions within Washington County. The data show particularly high unmet affordable housing needs in Tigard and Tualatin. (See pp. 12-13)</p> <p><b>Pipeline:</b><br/>The LIS indicates that the majority of Washington County’s focus and resources will be on bond funded projects during the 5-7 year timeframe of their LIS, but that there will likely be at least some federal and state funding resources dedicated to non-bond projects during this time. HAWC will “monitor the pipeline of projects being proposed and funded in the geographic area of this Implementation Strategy and will collaborate with developers to identify the most appropriate funding and other support that can be provided to those projects.” Washington County’s HOME funds have a 15% set-aside for Community Housing Development Organizations (CHDOs) to support their organizational operations. (See p. 19) This aligns with the County’s plan to set-aside bond funding for CHDOs, as discussed in the Project Selection section below (See pp. 16-17).</p>   |

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| <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><br/>The LIS describes leveraging “principles” including maximizing the use of non-competitive and private resources, maximizing local resources, and seeking federal/state/county resources. The County’s Housing Production Opportunity Fund (HPOF) currently has a \$1 million General Fund allocation with unspent funds rolling into the FY19-20 budget, with a recommended addition of \$4 million to be included in next year’s budget. (See pp. 18-19)</p> <p>Local jurisdiction incentives (e.g. SDC/fee waivers) are included in project “evaluation criteria” informing amount of bond funding (See p. 13).</p> <p>The County has committed vouchers to support 124 of its 334 units slated for affordability at 30% AMI and states that some portion of these project based vouchers will be committed to HAWC owned projects and some will be available to other sponsors. (See p. 18).</p> <p><b>Leveraged services:</b><br/>Related to below PSH goal and resident services requirements, the LIS includes a commitment to “work with various agencies, local governments, non-profits and others to develop housing units in conjunction with the provision of services to allow an individual and/or family to be successful and thrive.”</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>PSH:</b><br/>The LIS establishes a goal of achieving 100 PSH units. The County will look for opportunities to leverage existing services with project-based vouchers, and will monitor legislation at the State level regarding permanent supportive housing capital, rental subsidy and service dollars.</p> <p><b>Resident services:</b><br/>The County 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. The County will work closely with its Dept. of Health and Human Services to connect developer-owners to public and private service providers in the community to create needed partnerships.</p> <p>County 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 and community building activities.</p> <p>Washington County will utilize its project-based vouchers in different ways to leverage and support providers who can bring services to housing projects. Additionally, the County is working with social service agencies and other community partners to link supportive services to affordable housing. (See pp. 21-22)</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>Selection process:</b><br/>Development opportunities, needs, and location priorities for housing will drive the selection of projects. Washington County will rely on ongoing relationships with jurisdictional partners and internal information from housing studies conducted by Washington County for the Office of Community Development and the Housing Services Departments to inform decisions. Washington County anticipates primarily selecting projects through regular Notices of Funding Availability (NOFAs) and with targeted Request for Proposals (RFP). (See p. 12)</p> <p>Developers may be selected outside of the RFP or NOFA process under the following conditions, assuming the projects otherwise meet the County’s requirements and criteria:</p> <ul style="list-style-type: none"> <li>• If they are eligible for the CHDO set-aside (see below)</li> <li>• If a developer is proposing an acquisition of an existing building for conversion to regulated affordable housing</li> <li>• If a development site was comprised of adjoining parcels that included one owned by the County and one owned by the developer</li> </ul> <p>(See pp. 12 and 17)</p> <p>When there is opportunity to purchase property for the development of affordable housing, Washington County will consult with the local jurisdiction as well as other affordable housing developers to avoid any unintentional competition for the same sites. Washington County may develop and own the project or select a developer/owner to develop the site. In most instances, the county will use a transparent Request for Proposals (RFP) process to select an affordable housing developer/owner for sites controlled by the county. (See p. 17)</p> |

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|  |  |  | <p><b>CHDO set-aside:</b><br/>The County will set aside \$25 million set aside for Small Non-Profits and Community Housing Development Organizations (CHDOs), which include private nonprofit, community-based service organizations that include community members on their boards and develop housing specifically for the community they serve. The LIS acknowledges that these organizations play an important role in reaching difficult-to-house populations and communities of color. Set-aside utilization will be reviewed at 18-24 months and 48-60 months after adoption (as part of comprehensive LIS review). This funding will be outside of the NOFA and RFP process. (See pp. 16-17)</p> <p><b>Site acquisition prioritization criteria:</b><br/>Washington County will explore purchasing sites for affordable housing development, taking the following factors into consideration:</p> <ul style="list-style-type: none"><li>• Free/discounted land;</li><li>• Opportunities to meet community development goals or provided beneficial service partnerships;</li><li>• Opportunities to maximize use of 4% Low Income Housing Tax Credit (LIHTC) resources.</li></ul> <p><b>Project selection Criteria:</b><br/>Washington County will use seven factors to evaluate housing development and the amount of funding that may come from the Metro Affordable Housing Bond Program.</p> <ul style="list-style-type: none"><li>• Jurisdictional and area partnerships and geographic dispersal</li><li>• Housing needs data and Census tract analysis</li><li>• Land availability and cost</li><li>• Local development partners</li><li>• Major public transportation and transit corridors</li><li>• High opportunity areas, including sites located near transit, jobs, high-performing schools, commercial services, parks and open space, and basic needs services</li><li>• Areas identified by HUD as Qualified Census Tracts (QCTs) or Small Area Difficult to Develop Areas (SADDAs) – designated areas where projects receive a 30% “boost” in LIHTC leverage</li></ul> <p>(See pp. 13-14)</p> <p><b>Threshold requirements:</b><br/>To achieve goals of racial equity and to provide economic opportunities for minority-owned, women-owned or emerging and disabled veteran-owned small businesses, Washington County will apply threshold requirements for all developers and owners of Metro Affordable Housing Bond Program funded housing developments:</p> <ul style="list-style-type: none"><li>• Threshold utilization goal of 15% for firms that have been certified by the State of Oregon as a Minority-Owned Business Enterprise, a Women-Owned Business Enterprise, a Disadvantaged Business Enterprise, or an Emerging Small Business (M/W/DBE/ESB) with an aspirational goal of 20%</li><li>• Requirement that project developers and/or owners make units available to minorities and disadvantaged populations using affirmative marketing, low-barrier screening, and commitments to monitor lease-up outcomes. (See pp. 15-16)</li></ul> <p><b>Competitive criteria:</b></p> <ul style="list-style-type: none"><li>• Workforce participation</li><li>• Permanent Supportive Housing</li><li>• Culturally specific services to facilitate lease-up and ongoing services</li><li>• Universal design principles</li></ul> <p>(See p. 16)</p> <p><b>Anticipated Timing of Solicitations:</b><br/>The first NOFA is intended to be released in late 2019 or early 2020, with a goal to align the county’s NOFA timeline with other resources potentially available at that time. The county is committed to a transparent project selection process and will publicly notify potential housing developers of future NOFAs as they are made available. (See pp. 17-18)</p> |
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|                          |   |  | <p><b>Role of governing/advisory bodies in Project Selection:</b><br/>                 Washington County will approve project selection according to the following process: staff level recommendation to the Housing Advisory Committee (15 members representing real estate, property management, finance, construction, design, planning, social service providers, minority and elderly groups, veterans and public housing residents), followed by a recommendation for approval to the Housing Authority Board of Directors which is comprised of the 5-member Washington County Board of Commissioners, one community member and a public housing resident. (See p. 24)</p>  |
| <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>Evaluation strategy</b><br/>                 Washington County will use seven factors to evaluate housing development: Jurisdictional and Area Partnerships and Geographic Dispersal, Housing Needs Data and Census Tract Analysis, Land Availability and Cost, Local Development Partners, Major Public Transportation and Transit Corridors, High Opportunity Areas and Areas Identified by HUD as Qualified Census Tracts (QCTs) and Small Area Difficult to Develop Areas (SADDAs). (See pp. 13-14)</p>   |
| <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>Fair Housing:</b><br/>                 The Analysis of Impediments to Fair Housing produced jointly with the City of Beaverton in 2012 as a requirement for receiving federal housing and community development funds, identified six strategy areas incorporated in the LIS. (See p. 6)</p> <p><b>Other policies and strategies:</b><br/>                 Washington County will require that project developers and/or owners make units available to minorities and disadvantaged populations using best practice marketing strategies which will require affirmative outreach and marketing to target populations, requiring project sponsors to use low barrier screening criteria, require sponsors to review appeals of denials of standard screening, use project-based voucher (PBV) RFP process to leverage units with low-barrier screening. (See p. 15)</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>Context</b><br/>                 Washington County coordinated an affordable housing developer forum as well as a homeownership developer conference call to receive general feedback as well as to focus on issues of advancing racial equity, permanent supportive housing, and selection criteria. (See p. 11)</p> <p><b>MWESB</b><br/>                 Washington County is requiring a threshold utilization goal of 15% for firms that have been certified by the State of Oregon as a MWESB with an aspiration goal of 20%. (See p. 15)</p> <p><b>Apprenticeship</b></p>   |

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|                          |                                      |  | <p>Washington County will work with WorkSystems and Metro to develop apprenticeship programs that benefit development teams for Metro bond-funded projects as well as participate in Metro’s Construction Careers Pathways Project. (See p. 16)</p>  |
| <input type="checkbox"/> | <p style="text-align: center;">√</p> | <p>Requirements or competitive criteria for projects to align culturally specific programming and supportive services to meet the needs of tenants.</p>  | <p><b>Commitments</b><br/>                 Commitment to work with various stakeholders to develop housing units in conjunction with the provision of services to allow tenants be successful and thrive. County will increase the number of accessible and visitable housing units for individuals of all ages and abilities through the use of universal design principles</p> <p>Washington County will set aside \$25 million in Metro Affordable Housing Bond funds for projects sponsored by small grassroots nonprofit affordable housing developers and/or a CHDO based in Washington County. (See p. 16)</p> <p>Washington County will work closely with its Department of Health and Human Services to connect developer-owners to public and private service providers in the community to create needed partnerships. The County will also look for opportunities to leverage existing services with language in RFPs for project-based vouchers.</p> <p><b>Requirements</b><br/>                 County will require housing developers and sponsors to use marketing and outreach methods to reach communities of color and difficult to house populations. (See p. 16)</p> <p>County will require resident service coordination to be provided at all projects, appropriate to the level of need of the target population. These resident services will focus on eviction prevention, helping residents access mainstream services for which they may be eligible and community building activities.(See p. 21)</p> |
| <input type="checkbox"/> | <p style="text-align: center;">√</p> | <p>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> | <p><b>Focus Communities for Engagement</b><br/>                 Consultation with over 300 community members as well as individuals representing over 50 agencies to understand key issues and suggestions to addressing affordable housing in collaboration with the County, Beaverton and Hillsboro. Attendance to existing community and agency-based meetings to gain as much varied input as possible.</p> <p>Staff heard from included communities of color and individuals with the following lived experiences:</p> <ul style="list-style-type: none"> <li>• Low-income</li> <li>• Seniors</li> <li>• Youth experiencing housing instability</li> <li>• Physical disabilities</li> <li>• Developmental disabilities</li> <li>• Mental health concerns</li> <li>• Addictions issues</li> <li>• Limited English proficiency</li> <li>• Immigrants and refugees</li> <li>• Current or previous experience of housing instability</li> <li>• Residents of low-income housing</li> <li>• Justice-involved</li> <li>• Service providers for people on probation and currently incarcerated</li> <li>• Citizen Participation Organization (CPO) members</li> <li>• Tribal community</li> <li>• Veterans</li> </ul> <p>(See pp. 7-8 and 33)</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><b>Barriers</b><br/>Cost (41%) – affordability of rent; application fees; costs to move; deposits; costs related to past rental history, criminal history, and credit history; and utility costs</p> <ul style="list-style-type: none"> <li>• Screening Criteria (24%) – rental history; criminal history; credit history; citizenship status; and understanding what purpose screening serves and why it is necessary</li> </ul> <p><b>Service needs</b></p> <ul style="list-style-type: none"> <li>• Education (25%) – skills building for self-sufficiency, housing sustainability; vocational training and mentorships; and renter education related to navigating the system, understanding tenant rights, and compliance with rules</li> <li>• Service Alignment (22%) – coordination between community-based organizations, agencies and other service providers; coordination of -services specific to families and seniors;</li> </ul> <p><b>Location</b></p> <ul style="list-style-type: none"> <li>• Services (24%) – proximity to grocery stores, employment, medical providers, and other supportive services</li> <li>• Safe/Sense of community (45%) – good schools; sense of community; and safe, quiet, walkable neighborhood</li> </ul> <p><b>Marketing</b></p> <ul style="list-style-type: none"> <li>• Predominately focused on sharing information through community-based organizations and other word of mouth opportunities as well as communicating information in multiple languages and formats.</li> </ul> <p>(See p. 9 for full summary of detail within each category)</p> |
| <input type="checkbox"/> | √ | Summary of how the above themes are reflected in the Local Implementation Strategy.   | <p><b>Themes</b><br/>The following policies were developed based on the feedback received under the key themes identified above:</p> <ul style="list-style-type: none"> <li>• County’s threshold project requirement of low-barrier screening criteria (Barriers)</li> <li>• Use of universal design as a competitive selection criterion (Barriers)</li> <li>• County’s goal of 100 Permanent Supportive housing (PSH) units (Service needs)</li> <li>• County’s housing development priority related to project in high opportunity areas (Location)</li> <li>• County’s housing development priorities related to projects near major public transportation and transit corridor (Location)</li> <li>• County’s threshold project requirement for affirmative marketing (Marketing)</li> </ul> <p>(See p. 10)</p>  |
| <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   | <p><b>Focus</b><br/>Community engagement will target three audiences:</p> <ol style="list-style-type: none"> <li>1. Underrepresent communities- engagement will focus on community members providing advice about how Washington County can address and reduce systemic barriers. Conversations will be conducted via existing meetings, in-person gatherings, storytelling sessions, and may be supported or conducted by nonprofits and community groups that are trusted within the community.</li> <li>2. Neighbors living in the area or adjacent to the new affordable housing developments. Outreach both in-person and online and will be limited to the time before and during which the project is being developed.</li> <li>3. General community members. Engagement will be less intensive than with the first two groups but will be on going during the 5-7 years. Strategies are more likely to be electronic in nature and will focus on project updates and providing access to input mechanisms if desired.</li> </ol> <p>Ongoing community engagement will be based on expressed needs of the potentially impacted communities for each project, identifying preferred methods of engagement and utilize engagement strategies that are flexible and fluid based on community and stakeholder input.<br/>(See p. 26)</p>   |

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|                          |          | <p>people who have experienced or are experiencing housing instability; and</p>   | <p><b>Contracting</b><br/>Washington County will contract with a community engagement practitioner to provide additional capacity to continue efforts to engage under-represented communities, neighborhoods living around new affordable housing developments and the community in general. The community engagement consultant will:</p> <ul style="list-style-type: none"> <li>• Promote, publish and share opportunities and updates widely and in multiple formats and languages as needed. This may include electronically, hard copy, social media, and by telephone (as requested)</li> <li>• Provide trauma informed engagement opportunities and environments</li> <li>• Ensure that engagement opportunities are accessible to all by being held in the evenings</li> <li>• and/or on weekends, in different community locations and places where people naturally</li> <li>• convene, and include community support such as food, child care and translation services</li> </ul> <p>(See p. 26-27)</p>   |
| <input type="checkbox"/> | <p>√</p> | <p>Strategy for ensuring community engagement to shape project outcomes to support the success of future residents.</p> | <p><b>Strategy</b><br/>The completion and approval of the Washington County Local Implementation Strategy will initiate the beginning of Phase Two for community engagement related to the Metro Affordable Housing Bond Program’s implementation. Phase Two is the long-term and ongoing community engagement directly related to planning, identification and development of affordable housing units. (See p. 26)</p> <p>Washington County’s community engagement planning and approach will be sensitive to communities who may not trust that their input will lead to meaningful and/or constructive change and that communities may be fearful engaging with government agencies. Planning efforts will incorporate techniques to address these potential barriers to receiving the community’s input.</p> <p><b>Periodic Review</b><br/>Washington County will review the implementation Strategy at a minimum of twice (18-24 and 48-60 months) during the implementation phase. (See p. 11)</p> <p><b>Housing Advisory Committee</b><br/>As part of the multi-stage review and approval process, before a project is forward to Metro for concept endorsement, the Housing Advisory Committee (HAC) will review the project and provide input to the Housing Authority Board of Directors (HABOD). The Housing Advisory Committee is comprised of 15 members representing real estate, property management, finance, construction, design, planning, social service providers, minority and elderly groups, veterans and public housing services. (See p. 23)</p> <p><b>Evaluation Metrics</b><br/>To gain and maintain public trust, Washington County will make every effort to develop ongoing evaluation measures that allow adjustments in response to expressed community need/wants and expected outcomes as evidenced in participation demographics and quality of participation, as well as tenant demographics and outcomes in future affordable homes. Evaluation metrics include:</p> <ul style="list-style-type: none"> <li>▪ Were you able to successfully reach the intended audience?</li> <li>▪ Did people receive the necessary information they needed to make a relevant response?</li> <li>▪ Did you choose the right type or level of engagement to match the purpose?</li> <li>▪ Was feedback received from the community positive or negative?</li> <li>▪ Did the community feel like they received proper feedback on the results of the engagement?</li> <li>▪ Did they indicate they want to be part of a similar process again?</li> <li>▪ If not, why not? And what could be done differently to make the process better, more inclusive, and more impactful?</li> </ul> <p>(See p. 27)</p> |